STATE BOARD OF EDUCATION MEETING
August 10-11, 2016
Idaho State University
Pond Student Union Building
Ballroom
1065 South 8th Avenue, Bldg. 14
Pocatello, Idaho

Wednesday, August 10, 2016, 10:00 a.m. (Mountain Time)

BOARDWORK

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

PLANNING, POLICY & GOVERNMENTAL AFFAIRS

1. Idaho State University Annual Report and Tour

WORK SESSION

PPGA

A. Board Data Dashboard
B. Higher Education Operational Plan

Thursday, August 11, 2016, 8:00 a.m. (Mountain Time)

OPEN FORUM

CONSENT AGENDA

AUDIT

1. University of Idaho - UI Foundation Agreement

BAHR – SECTION I – Human Resources

2. Boise State University – Multi-Year Contracts – Women's Head Basketball Coach
3. Executive Officers – Employment Agreements

BAHR – SECTION II – Finance

4. University of Idaho – Multi-Year Contract – Swire Coca-Cola USA

IRSA

STATE BOARD OF EDUCATION
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5. Programs and Changes Approved by the Executive Director
6. Higher Education Research Council Appointment

PPGA

7. Lewis-Clark State College – Faculty Constitution Amendment
8. President Approved Alcohol Permits

SDE

9. Professional Standards Commission Appointments
10. Adoption of Computer Applications Curricular Materials
11. Bias and Sensitivity Committee Appointments

PLANNING, POLICY & GOVERNMENTAL AFFAIRS

2. Chairman's Report
3. Northwest Regional Advisory Committee Update
4. Idaho Career Technical Education Annual Report
5. Board Policy I.E., Executive Officers – First Reading
6. Board Policy I.J., Use of Institutional Facilities – First Reading
7. Board Policy - Bylaws – Second Reading
8. Idaho Indian Education Committee – Bylaws
9. Idaho Educator Pipeline Report
10. Accountability Oversight Committee – Statewide Accountability System Recommendations
11. Education Opportunity Resource Committee Appointment
12. Temporary/Proposed Rule IDAPA 08.01.02 – Postsecondary Credit Scholarship Program
13. Temporary/Proposed Rule IDAPA 08.01.04 – Postsecondary Residency Requirements
14. Proposed Rule IDAPA 08.01.09, Rules Governing the Gear Up Idaho Scholarship Program
15. Temporary/Proposed Rule IDAPA 08.02.01.801, Rules Governing Administration – Continuous Improvement Plans
16. Temporary/Proposed Rule IDAPA 08.02.01, Rules Governing Administration – Literacy Growth Targets
17. Temporary/Proposed Rule IDAPA 08.02.01, Rules Governing Administration – Statewide Average Class Size
18. Proposed Rule IDAPA 08.02.02, Rules Governing Uniformity – Teacher Certification Requirements

19. Proposed Rule IDAPA 08.02.03, Rules Governing Thoroughness – Career Technical Education Content Standards

20. Proposed Rule IDAPA 08.02.03.105, Rules Governing Thoroughness –Graduation Requirement- Proficiency

21. Temporary/Proposed Rule IDAPA 08.02.03, Rules Governing Thoroughness – Civics and Government Content Standards Proficiency – Graduation Requirement

22. Proposed Rule IDAPA 08.02.03,.111 – 114, Rules Governing Thoroughness – Comprehensive Assessment Program and Accountability Requirements

23. Proposed Rule IDAPA 08.02.05, Rules Governing Pay for Success Contracting

24. Proposed Rule IDAPA 08.05.01, Rules Governing Seed and Plant Certification

25. Proposed Rule IDAPA 47.01.01, Rules of the Division of Vocational Rehabilitation

26. Proposed Rule IDAPA 47.01.02, Rules and Minimum Standards Governing Extended Employment Services

27. Proposed Rule IDAPA 55.01.03, Rules Governing Career Technical Schools

INSTRUCTION, RESEARCH & STUDENT AFFAIRS

1. Board Policy – Section III.O. Course Placement – First Reading
2. Five-Year Program Plan
3. Annual Program Prioritization Report
4. Boise State University – Online Graduate Certificate in Educational Gaming and Simulation
5. EPSCOR Annual Report
6. Chairman's Report

BUSINESS AFFAIRS & HUMAN RESOURCES

Section I – Human Resources

1. Amendment to Board Policy – Section II.F. – Regarding Non-classified Employees – First Reading

2. Idaho State University – Reclassification of Provost to Executive Vice President and Provost

Section II – Finance

1. FY 2018 Line Items

2. FY 2018 Capital Budget Requests

3. Intercollegiate Athletic Reports - NCAA Academic Progress Rate (APR) Scores

4. Idaho National Laboratory – Board Sponsorship

5. Boise State University - Oracle HCM Cloud Application Licensing Agreement

6. Idaho State University - Land Use

7. Idaho State University Disposal of Real Property - O'Neall Property in McCammon, Idaho

8. Idaho State University - Ground Lease – Idaho College of Osteopathic Medicine
9. Idaho State University - Online Program Fee – Community Paramedic Academic Certificate Program
10. Eastern Idaho Technical College – Right of Way Agreement with City of Idaho Falls

DEPARTMENT OF EDUCATION

1. Superintendents Update
2. Proposed Rule IDAPA 08.02.03.004.01, Idaho Content Standards
3. Temporary and Proposed Rule IDAPA 08.02.03.106, Advanced Opportunities

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

2. Minutes Approval

BOARD ACTION

I move to approve the minutes from the June 2, 2016 special Board meeting and the June 15-16, 2016 regular Board meeting, as submitted.

3. Rolling Calendar

BOARD ACTION

I move to set August 16-17, 2017 as the date and Idaho State University as the location for the August 2017 regularly scheduled Board meeting.

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Idaho 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 Career-Technical Education

DRAFT MINUTES
IDAHO STATE BOARD OF EDUCATION

June 2, 2016
Office of the State Board of Education
Len B. Jordan Building
650 W. State Street, 3rd Floor
Boise, Idaho

A special meeting of the State Board of Education was held June 2, 2016. It originated from the Large Conference Room of the State Board of Education Office in the Len B. Jordan Building in Boise, Idaho. Board President Don Soltman presided and called the meeting to order at 3:30 p.m. Mountain Time. A roll call of members was taken.

Present:
Don Soltman, President
Emma Atchley, Vice President
Bill Goesling, Secretary
Richard Westerberg
Linda Clark
Debbie Critchfield

Absent:
Sherri Ybarra, State Superintendent
Dave Hill

EXECUTIVE SESSION (Closed to the Public)

M/S (Atchley/Goesling): **To meet in executive session pursuant to Section 74-206(1)(b) Idaho Code, "To consider the evaluation, dismissal or disciplining of . . . a public officer, employee, staff member or individual agent, or public school student."** A roll call vote was taken and the motion carried unanimously 5-0. Board members entered into Executive Session shortly after 3:30 p.m. Mountain Time.

M/S (Westerberg/Critchfield): To go out of executive session and adjourn the meeting. The motion carried unanimously 5-0. The group exited Executive Session and adjourned the meeting at 3:52 p.m. Mountain Time.

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Idaho 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 Career-Technical Education

DRAFT MINUTES
IDAHO STATE BOARD OF EDUCATION

June 15-16, 2016
Eastern Idaho Technical College
Rooms 6163/6164
Idaho Falls, Idaho

A regularly scheduled meeting of the State Board of Education was held June 15-16, 2016 at Eastern Idaho Technical College, Rooms 6163/6164, in Idaho Falls, Idaho.

Present:

Don Soltman, President	Richard Westerberg
Emma Atchley, Vice President	Dave Hill
Bill Goesling, Secretary	Debbie Critchfield
Linda Clark	Sherri Ybarra, State Superintendent

Wednesday, June 15, 2016

Board President Don Soltman presided and called the meeting to order at 11:00 a.m. Mountain Time, and thanked President Aman and Eastern Idaho Technical College their hospitality.

BOARDWORK

1. Agenda Review / Approval

BOARD ACTION

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

2. Minutes Review / Approval

BOARD ACTION

M/S (Atchley/Goesling): To approve the minutes from the April 13-14, 2016 Regular Board Meeting, the May 18-19, 2016 Board Retreat, and the June 2, 2016 Special Board meeting as submitted. The motion carried unanimously.

3. Rolling Calendar

BOARD ACTION

M/S (Atchley/Goesling): I move to set June 21-22, 2017 as the date and North Idaho College as the location for the June 2017 regularly scheduled Board meeting. The motion carried unanimously.

PLANNING, POLICY AND GOVERNMENTAL AFFAIRS

1. Eastern Idaho Technical College (EITC) – Annual Report and Tour

As part of President Aman's progress report to the Board, the report included a tour of key areas on EITC's campus. Specific details regarding the institutions progress toward meeting its strategic plan goals may be found in the attached report.

WORKSESSION

Planning, Policy and Governmental Affairs (PPGA)

1. 60% College Completion Goal – Data

Mr. Carson Howell, Director of Research at the Board office, provided a report on how the Board uses multiple sources and measures to track progress on the Board's 60% goal. Mr. Howell reported on the progress made to date toward that goal and the measures used to gauge progress toward the benchmark.

The educational attainment measure data is based on the American community survey. Dr. Hill asked many questions about the margin of error in the quantitative data. He and Mr. Howell agreed upon about a 3-4% level of uncertainty.

Mr. Howell reported on Idaho's data, in relation to national data in that Idaho is at national levels. Additional measures used for determining progress toward Idaho's educational attainment goal include dual credit, retention rates, remediation, and degree production. Related to dual credit, there is a 71% go-on rate for students who take dual credit courses, as compared to 45% of students who don't take dual credit courses. Data indicates that students who take dual credit courses also maintain a higher grade point average (GPA). Dual credit by institution generated questions surrounding why or how some institutions have been more successful at getting students to take dual credit courses. North Idaho College in particular has been especially successful with dual credit students taking courses on campus rather than at the high school. Dr. Clark asked to see a breakdown of the dual credit courses by core versus elective.

Related to retention rates at 4-year institutions, the current benchmark is 85% and Idaho is trending upward, but the institutions individually show different results. This appears to be particularly related to populations at each of the institutions, and the differences between institutions on how they handle student retention. Related to remediation, Mr. Howell reported on the SAT benchmarks on reading and writing, where the benchmark is now at 480 rather than at 500 (last year the test was different). He reported 62.4% of Idaho students met the statewide SAT benchmark; 35.4% of students meet the Math benchmark.

One area the Board is focused on is moving students directly on from high school to college. There is concern about students taking a “gap year” before going on to college. Based on high school feedback reports and postsecondary progress as of March 2015, one in two students go on to college. If students took a one year break or “gap year”, the go-on rate dropped to one in ten students going on to college. This indicates a tremendous need in getting students to go to college right after high school. The Board hopes direct admissions will have an effect on this situation. Mr. Howell reported on growth in degree production from 2010 to 2015 which shows promise. However, the growth in degree production doesn’t appear to be influencing the 60% educational attainment goal. Staff research shows growth in STEM fields and graduate mobility; many STEM students are graduating from an Idaho institution and then leaving the state. The question is why are they leaving? Data shows wages play a large part of influencing students, with Idaho’s wages at 56% of the average. In comparison to Oregon, Idaho’s wages are much lower.

Related to scholarships, Mr. Howell reported that for 2016 (FY17) the Opportunity Scholarship 3,763 students applied, and 2,289 have accepted; those students have an average GPA of 3.56. Related to tuition and fees Mr. Howell reported the average debt of Idaho graduates with four-year degrees is around $26K. He noted the proportion of students graduating from Idaho institutions with debt is one of the highest in the country; about 72%. He pointed out that Lewis-Clark State College (LCSC) had the least amount of debt for graduates. Keeping tuition and fees low for the benefit of students has been instrumental, and the Board is working on reducing time-to-completion which would also help drive down debt for college graduates. Mr. Howell reported on future policy initiatives, adding outcomes based funding should also help incentivize institutions.

Ms. Ybarra asked about student feedback and what staff found from the student surveys. Mr. Howell reported that the responses were broad, but overall summarized the need for better college counseling, that some students just need a push to gain confidence and encouragement, and effective communication to make sure students know they have the opportunity to go on and that guidance is available.

Policy initiatives the Board and staff are working on include a common application, and adults returning to higher education initiatives. Mr. Howell reviewed a chart of college attendance by age group. It emphasized the need for 20-24 year olds to return to higher education to move the needle on the Board's goal. The other age group areas included 25-34, 35-44, and 45-54, and all showed a gap between where they are presently and 60%, indicating the need for higher education in all age groups. Only the 55 and over age group came in at over 60% having a degree or certificate. Mr. Howell reiterated that the initiatives of the Board are all intended to improve educational attainment, regardless of the age range.

There was discussion about the 60% goal and the data presented. Dr. Goesling asked about the go-on rates for some of the sub populations in Idaho. Mr. Howell didn't have exact data, but remarked that the go-on rates for sub populations in Idaho are very poor. Dr. Goesling requested that the Board look at those populations and consider strategies for those groups. Dr. Clark pointed out an area of concern is not necessarily the go-on rate, but the completion rate – which is extremely low. Getting students to finish and remediation issues are areas where the Board needs to continue focus in order to move the needle. There was discussion about how Idaho compares nationally with go-on rates. Mr. Howell responded the national average was 62% in 2012 and Idaho is on the lower end at around 51-52%; the number one state is Mississippi.

EXECUTIVE SESSION

BOARD ACTION

M/S (Atchley/Goesling): To go into executive session pursuant to Section 74-206(1)(b) and (d) Idaho Code to consider the evaluation, dismissal or disciplining of a public officer, employee, staff member or individual agent and to consider records that are exempt from disclosure as provided in chapter 1, title 74, Idaho Code. A roll call vote was taken and the motion carried 7-0. Superintendent Ybarra was absent from voting.

Thursday June 16, 2016, 8:00 a.m., Eastern Idaho Technical College, Rooms 6163/6164, Idaho Falls, Idaho.

Board President Soltman called the meeting to order at 8:00 a.m. Mountain Time for regularly scheduled business. There was one participant for Open Forum.

OPEN FORUM

Mr. Suketu Gandhi addressed the Board about including quality text books in education. He felt some of the text books approved by the Board should not be used, and that the Board should reject poor quality text books, especially in math. He reported they are not useful to students and quality, challenging exercises are missing. He recommended using upper math high quality text books in grade and middle schools, and also recommended involving university professors in determining board policies when it comes to education. He pointed out students in chemistry are not required to take upper division courses such as physical chemistry and quantum mechanics, both of which are foundational. By not taking these courses it renders them unsuitable to teach the subject. He added that foundational studies of new student education are missing for new grads, and pointed out a number of other deficiencies in upper division studies resulting in a disservice to the student. Mr. Gandhi felt this can be avoided by including university professors and knowledgeable people on the subject matter in the formulation of board policies. He felt this would be instrumental in removing inequality among students and districts through quality teaching by having the Board change the way it sets policy. He provided a handout for the Board.

CONSENT AGENDA

BOARD ACTION

M/S (Atchley/Hill): To approve the Consent Agenda as amended. The motion carried unanimously.

Ms. Atchley asked for unanimous consent to pull Tab 12, Idaho State University Teacher Preparation Program Review, from the Consent Agenda and to consider it during the Department's portion of the agenda. There were no objections to the request.

BAHR

Section I – Human Resources

1. University of Idaho – Five Year Employment Agreement – Clinical Law Instructor and Director of External Programs

BOARD ACTION

By unanimous consent to approve the request by the University of Idaho to approve a five year contract renewal for clinical law instructor and Associate Dean for Boise Programs, Lee Dillion, and to authorize the University's Vice President for Finance to execute the contract in substantial conformance to the form submitted in Attachment 1.

Section II – Finance

2. Boise State University – Revised Purchasing Policy

BOARD ACTION

By unanimous consent to approve Boise State University's proposed revised purchasing policy as submitted in Attachment 1 and to find it substantially consistent with Title 67, Chapter 92 Idaho Code; and authorize the University to implement the revised purchasing policy effective July 1, 2016.

IRSA

3. State General Education Committee Appointments

BOARD ACTION

By unanimous consent to appoint Ms. Jana McCurdy, representing the College of Western Idaho; Dr. Margaret Johnson representing Idaho State University; and Dr. Kenton Bird, representing the University of Idaho to the General Education Committee, effective immediately.

4. EPSCoR Idaho Committee Appointment

BOARD ACTION
By unanimous consent to appoint Dr. Beierschmitt to the Idaho Experimental Program to Stimulate Competitive Research Idaho Committee as a representative of the Idaho National Laboratory effective immediately.

PPGA

5. Data Management Council Appointments

BOARD ACTION
By unanimous consent to approve the reappointment of Georgia Smith, Don Coberly, Chris Campbell, Matthew Rauch, and Shari Ellertson and appointment of Connie Black to the Data Management Council for terms starting on July 1, 2016 – June 30, 2018.

6. Accountability Oversight Committee Appointment

BOARD ACTION
By unanimous consent to approve the appointment of Rob Sauer to the Accountability Oversight Committee for a term of 2 years commencing July 1, 2016 and ending on June 30, 2018.

7. President Approved Alcohol Permits

This item was included for informational purposes.

SDE

8. Requests to Transport Students Less Than One and One-Half Miles in 2015-2016 School Year

BOARD ACTION
By unanimous consent to approve the requests by ninety eight (98) school districts and thirteen (13) charter schools for approval to transport students less than one and one-half miles as submitted in Attachment 1.

9. Student Transportation Funding Cap Waivers

BOARD ACTION
By unanimous consent to approve the request by Garden Valley School District for a waiver of the 103% transportation funding cap, at a new cap percentage rate

for the fiscal year 2016 of 133%, for a total of $53,799 in additional funds from the public school appropriation.

BOARD ACTION
By unanimous consent to approve the request by Highland School District for a waiver of the 103% transportation funding cap, at a new cap percentage rate for the fiscal year 2016 of 143%, for a total of $11,952 in additional funds from the public school appropriation.

BOARD ACTION
By unanimous consent to approve the request by Meadows Valley School District for a waiver of the 103% transportation funding cap, at a new cap percentage rate for the fiscal year 2016 of 128%, for a total of $21,402 in additional funds from the public school appropriation.

BOARD ACTION
By unanimous consent to approve the request by Moscow School District for a waiver of the 103% transportation funding cap, at a new cap percentage rate for the fiscal year 2016 of 115.5%, for a total of $47,528 in additional funds from the public school appropriation.

BOARD ACTION
By unanimous consent to approve the request by Mountain View School District for a waiver of the 103% transportation funding cap, at a new cap percentage rate for the fiscal year 2016 of 116%, for a total of $41,182 in additional funds from the public school appropriation.

BOARD ACTION
By unanimous consent to approve the request by Orofino View School District for a waiver of the 103% transportation funding cap, at a new cap percentage rate for the fiscal year 2016 of 116%, for a total of $19,011 in additional funds from the public school appropriation.

BOARD ACTION
By unanimous consent to approve the request by St. Maries School District for a waiver of the 103% transportation funding cap, at a new cap percentage rate for the fiscal year 2016 of 112.5%, for a total of $22,021 in additional funds from the public school appropriation.

BOARD ACTION
By unanimous consent to approve the request by Lapwai School District for a waiver of the 103% transportation funding cap, at a new cap percentage rate for the fiscal year 2016 of 139%, for a total of $4,299 in additional funds from the public school appropriation.

10. Mathematics Curricular Materials

BOARD ACTION
By unanimous consent to approve the adoption of the Mathematics curricular materials and related instructional materials as recommended by

11. Professional Standards Commission Appointments

BOARD ACTION
By unanimous consent to appoint Kathleen Davis as a member of the Professional Standards Commission for a three-year term beginning July 1, 2016, and ending June 30, 2019, representing Secondary Classroom Teachers.

BOARD ACTION
By unanimous consent to appoint Steve Copmann as a member of the Professional Standards Commission for a three-year term beginning July 1, 2016, and ending June 30, 2019, representing Secondary School Principals.

BOARD ACTION
By unanimous consent to appoint Mike Wilkinson as a member of the Professional Standards Commission for a three-year term beginning July 1, 2016, and ending June 30, 2019, representing School Counselors.

BOARD ACTION
By unanimous consent to appoint Mark Gorton as a member of the Professional Standards Commission for a three-year term beginning July 1, 2016, and ending June 30, 2019, representing Secondary Classroom Teachers.

BOARD ACTION
By unanimous consent to reappoint Tony Roark as a member of the Professional Standards Commission for a three-year term beginning July 1, 2016, and ending June 30, 2019, representing Public Higher Education (Letters and Sciences Representation).

BOARD ACTION
By unanimous consent to appoint Taylor Raney as a member of the Professional Standards Commission for a three-year term effective July 1, 2016, and ending June 30, 2019, representing Public Higher Education.

BOARD ACTION
By unanimous consent to appoint Mark Neill as a member of the Professional Standards Commission for the remainder of the three-year term which began July 1, 2014, and will end June 30, 2017, representing Public Higher Education.

BOARD ACTION
By unanimous consent to reappoint Virginia Welton as a member of the Professional Standards Commission for a three-year term effective July 1, 2016, and ending June 30, 2019, representing Exceptional Child Education.

13. Northwest Nazarene University Program Review

BOARD ACTION
By unanimous consent adopt the recommendations by the Professional Standards Commission and to accept the State Team Report for Northwest Nazarene University as submitted.

PLANNING, POLICY & GOVERNMENTAL AFFAIRS

2. Presidents' Council Report

Dr. Tony Fernandez, current chair of the President's Council, summarized the details from the April 5 and June 7th President's Council meetings. He reported that at the April meeting presidents were apprised of the new presidential evaluation template and process. Interest was expressed by the College of Idaho, Northwest Nazarene University, and Treasure Valley Community College on being included in direct admissions, and collectively the presidents were not supportive of requests from out of state or non-public institutions, but understand those entities may develop a similar initiative of their own. They reviewed highlights from the 2016 legislative session related to higher education, and discussed outcomes based funding. Presidents discussed gun legislation and how it affects campuses, community college trustee zoning, and how student health insurance is being implemented at Boise State University. They also discussed Title IX policy, guidelines, timelines for the budget development process.

For the June 7th President's Council meeting, President Staben recommended the Board discuss several topics at future Council meetings such as direct admissions, medical education task force, diversity go-on rates, and a long term legislative agenda. There was consensus that these topics and applicable national trends could be discussed at future Council meetings. Board staff briefed the presidents on several timing and process improvements for direct admissions that also includes a radio and television campaign beginning in late summer. They were briefed about Title IX and issues surrounding trans-gender concerns; new signage is being considered and institutions would like uniform signage. They discussed a letter received by each of the institutions on ADA compliance which requested payment for legal services. They determined the letter appeared to be a broadcast letter and institutions have chosen not to respond. President Fernandez reported that they were briefed on a meeting at the Governor's office that included the Board president and Executive Director regarding DFM's involvement with CEC; the Governor was supportive of DFM's actions and future discussions on the matter are planned. The four-year institutions were notified that the Board is going to engage an external firm to conduct 360 evaluations. He concluded by saying the July Council meeting was cancelled, and the next meeting will be August 7th.

Dr. Fox, President of the College of Southern Idaho (CSI), recognized this as Dr. Dunlap's last meeting; Dr. Dunlap is retiring from North Idaho College (NIC) at the end of June. Dr. Fox publically thanked him for his work at NIC. Dr. Fernandez also recognized Dr. Fox as the incoming chairman of the President's Council. Board member Critchfield thanked

Dr. Fernandez for this service as chairman of the Council and for his clear and thorough reports.

3. Idaho Public Television (IPTV), Annual Report

Mr. Ron Pisaneschi, General Manager of the Idaho Public Television, provided an overview of IPTV's progress in carrying out the agency's strategic plan. He invited the Board members to tour the station in Boise and to see IPTV in action. He proceeded with an overview of their content and services, the budget, statewide delivery systems, and challenges facing IPTV. He pointed out that PTV is the most trusted broadcaster in the nation, reporting that public television is an educational resource for all ages. Mr. Pisaneschi discussed preschool services and programs with early education content, reporting that IPTV's programming content has demonstrated outcomes for early learners. He reviewed examples of secondary, post-secondary, and lifelong learning services, pointing out IPTV has partnered with the Board office on the *Journey to College* initiative through the College Access Challenge Grant (CACG), and are an integral part of the EPSCoR project. Additional postsecondary services include student training and internships, broadcast and on-line telecourses, and searchable videos to name a few.

Mr. Pisaneschi reported IPTV is the most watched public station per capita in the nation serving more than 460,000 viewers each week. He pointed out that their programming both nationally and locally is available on all the new platforms including cell phone and desktop. He reviewed the critical need for the transmitters and funding. He recapped IPTV's local productions and the major awards they received; IPTV was nominated for 11 Emmy's this year which included an Emmy for *Outdoor Idaho*. He clarified that high quality programming encourages an increase in giving by private donors which contributes to the longevity of public television.

Mr. Pisaneschi reviewed the FY17 budget and its highlights. Appropriated funding for FY17 is $9.3 million and he expressed gratitude toward the Governor and legislature for a 30% increase in their budget. He pointed out, however, that still more than 2/3 of their funding comes from private contributions and grants. In comparison to their peer groups, Idaho Public Television still receives the fewest dollars. Their FY18 line item requests include two educational outreach positions and related expenses. He reviewed issues with the transmitters and equipment, and the significant costs associated. Additionally, they will see an increase in lease payments on equipment because it has reached "end of life". He expressed great concern with the FCC repackaging and explained how the transmitters and the translators work together, and the problems with not having enough translators – the big problem is there may not be enough channels to go around. They are working with the congressional delegation to address this concern.

Dr. Clark thanked Mr. Pisaneschi for the exemplary work accomplished on their strategic plan.

4. 2017 Legislative Ideas

BOARD ACTION

M/S (Critchfield/Goesling): To approve the legislative ideas as submitted in Attachment 1 and to authorize the Executive Director to submit these and additional proposals as necessary through the Governor's legislative process. The motion carried unanimously.

Ms. Critchfield indicated there was a detailed, itemized list of legislative ideas provided in the Board's agenda materials and provided a brief summary of the legislative process. She asked if there were particular items for discussion by the Board.

Dr. Goesling expressed concern about the Professional Standards Commission (PSC) item and felt a member of the Indian Education Committee should have a seat on the PSC. He provided some historical background on why he feels it necessary for a member of one of Idaho's five American Indian Tribes or someone from the Indian Education Committee to have a seat designated on the PSC.

Mr. Soltman asked if there were other legislative ideas Board members would like to discuss today. Mr. Westerberg indicated the list of legislative items did not include outcomes based funding. Ms. Bent clarified that the list of legislative ideas are only those things that require legislation and does not include things like outcomes based funding that only go through the legislative budget process. Mr. Westerberg was comfortable with the explanation.

Returning to the PSC recommendation, Ms. Bent clarified what is in statute for the membership of the PSC and where the nominations come from. She clarified that the Native American Indian Tribal groups were not excluded and further clarified Idaho Code is very specific to not exclude groups from the PSC. She recommended that communications to all interested groups be clear and nominations to the PSC be encouraged. She also pointed out there have been a number of years when the PSC has not had enough members. Dr. Goesling recommended making an American Indian Educator one of the seats. Board member Hill pointed out there is an administrative rather than legislative solution to the matter. Dr. Clark added that the Board is particularly sensitive to the inputs and representation of the Tribes throughout its committees. After additional discussion the consensus was to proceed through some sort of administrative process and by working directly with the Department of Education to seek nominations from the Native American Tribes for the PSC, starting with the next cycle of appointments. Dr. Goesling recommended sending a letter to the three Tribal chairmen from the Board President on what was discussed today.

5. Institution/Agency Strategic Plans

BOARD ACTION

M/S (Critchfield/Clark): To approve the Institution, Agency, and Special/Health programs strategic plans as submitted in attachments 1 through 22. The motion carried unanimously.

Ms. Critchfield noted the institutions are starting a process shortly to review their mission statements which would be available next April. Mr. Westerberg complemented the institutions and agencies on their work on the strategic plans.

6. Early Literacy Assessment Working Group Report

BOARD ACTION

M/S (Critchfield/Clark): To adopt the recommendations from the Early Literacy Assessment Working Group to replace the current statewide Idaho reading assessment with an electronically-administered, computer adaptive assessment and to forward the request for proposal provided as part of Attachment 1 to the Department of Education for initiation of the request for proposal process subject to appropriation. The motion carried unanimously.

Ms. Critchfield pointed out the motion and recommendations before the Board today are additional items that it had not previously been considered. These include: (i) that the current statewide reading assessment (Idaho Reading Indicator) be replaced with an electronically-administered, computer adaptive assessment; and (ii) that the Request for Proposal (RFP) contained in the report be forwarded to the Department of Education for initiation of the RFP process. As reported, the Working Group consulted with the Division of Purchasing to create a Request for Information (RFI). The RFI was distributed through the Division of Purchasing process and from the responses to the RFI the RFP was developed. Ms. Critchfield pointed out the legislature appropriated approximately $10 million towards literacy intervention and there was current ongoing funding for the IRI. Ms. Ybarra responded the money appointed for literacy was a huge step, but there was not enough funding in the appropriation for the IRI. She clarified that the new money appropriated would be going straight to the districts and if we were to get a new IRI we would need to ask the legislature for additional money over what is currently funded.

7. Amendment to Board Policy – Bylaws

BOARD ACTION

M/S (Critchfield/Goesling): To approve the first reading of Board policy - Bylaws as submitted in Attachment 1. The motion carried unanimously.

Ms. Critchfield pointed out this amendment would clarify the time period for which Board approval on a given item is relevant and when items need to be brought back to the Board for reconsideration. The recommended period is one year.

8. Amendment to Board Policy – Section I.P. – Idaho Indian Education committee – Second Reading

BOARD ACTION

M/S (Critchfield/Goesling): To approve the second reading of amendments to Board Policy I.P. Idaho Indian Education Committee, as presented in Attachment 1. The motion carried unanimously.

Ms. Critchfield pointed out this amendment will streamline policy language and provides greater definition to the roles of committees and members.

9. Amendment to Board Policy – Section I.Q. – Accountability Oversight Committee – Second Reading

BOARD ACTION

M/S (Critchfield/Hill): To approve the second reading of amendments to Board Policy I.Q. Accountability Oversight Committee as submitted in Attachment 1. The motion carried unanimously.

Ms. Critchfield reported this amendment allows the committee more flexibility in appointment the chair.

10. Amendment to Board Policy - Section I.T. – Title IX Policy – Second Reading

BOARD ACTION

M/S (Critchfield/Clark): To approve the second reading of Board Policy I.T. Title IX as submitted in Attachment 1. The motion carried unanimously.

Ms. Critchfield indicated there were no changes between first and second reading.

11. Amendment to Board Policy – Section IV.B. – State Department of Education, Standards Setting – Second Reading

BOARD ACTION

M/S (Critchfield/Hill): To approve the second reading of Board Policy IV.B. State Department of Education as submitted in Attachment 1. The motion carried unanimously.

Ms. Critchfield indicated this policy is facilitating the process for review of various minimum subject matter content standards.

12. Career Technical Education – Content Standards

BOARD ACTION

M/S (Critchfield/Clark): To approve the career technical secondary program content standards as submitted in Attachments 1 through 6. The motion carried unanimously.

Ms. Critchfield indicated the motion would approve the career technical secondary program content standards.

13. Boise State University - Alcohol Permit for 2016 Home Football Games – Pre Game Events at Caven Williams Sports Complex

BOARD ACTION

M/S (Critchfield/Westerberg): To reject the request for a waiver of Board policy Section I.J.2.c.i. and approve the request by Boise State University to establish a secure area under the conditions set forth in this request contingent on attendees receiving a written invitation (a game ticket does not constitute a written invitation) and in full compliance with all provisions set forth in Board policy Section I.J. for the purpose of allowing alcohol service for the 2016 football season, famous Idaho Potato Bowl, the 2017 spring game, post-season bowl game, and if applicable, the conference championship game, with a post-season report brought back to the Board. The motion carried 7-1. Dr. Hill voted nay on the motion.

Ms. Critchfield indicated this item is a request to waive Board policy for the purpose of allowing alcohol service at BSU in a secure area for the 2016-2017 home football season.

Dr. Hill asked for some background on the item. Board President Soltman provided background and that at the June 2015 Board meeting, the Board approved pregame alcohol service for the University of Idaho (UI), Idaho State University (ISU) and Boise State University (BSU). Later, the Board waived a portion of Board policy I.J. to allow for the expanded alcohol service on a one-year basis with additional caveats which included a restriction on underage children entering the alcohol service area.

Dr. Hill commented that as a matter of procedure the Board should not continue to waive policy, but he was concerned about the process used to discontinue the waiver. There was additional discussion on the concerns of the policy and alcohol service during the games. Ms. Bent clarified that the motion does not discontinue alcohol service, but returns the practice to what it was previously, and went on to provide background on Idaho law regarding alcohol service and allowances pursuant to Board policy.

14. Boise State University – Alcohol Permit for 2016 Home Football Games – Pre Game Events at Stueckle Sky Center

BOARD ACTION

M/S (Critchfield/Westerberg): To approve the request by Boise State University to allow alcohol service in Stueckle Sky Center during the 2016 home football season, Famous Idaho Potato Bowl, the 2017 spring game, and if applicable, the conference championship game in full compliance with Board policy section I.J. The motion carried unanimously.

15. Idaho State University - Alcohol Permit for 2016 Home Football Games

BOARD ACTION

M/S (Critchfield/Goesling): To approve the request by Idaho State University to establish secure areas as specified in Attachment 1 and 2 for the purpose of allowing alcohol service during pre-game activities under the conditions outlined in Board policy I.J. subsection 2.c. for the 2016 football season. The motion carried unanimously.

Ms. Critchfield pointed out Idaho State University's request is for one secure area on the east side of Holt arena.

16. University of Idaho - Alcohol Permit for 2016 Home Football Games – Pre Game Events

BOARD ACTION

M/S (Critchfield/Westerberg): To reject the request for a waiver of Board policy Section I.J.2.c.i. and approve the request by the University of Idaho to establish a secure area under the conditions set forth in this request contingent on attendees receiving a written invitation (a game ticket does not constitute a written invitation), not under the legal drinking age is admitted into the alcohol service and consumption area of the event, and in full compliance with all provisions set forth in Board policy Section I.J. for the purpose of allowing alcohol service for the 2016 football season, the 2017 spring game, post-season bowl game, and if applicable, the conference championship game, with a post-season report brought back to the Board. The motion carried unanimously.

17. University of Idaho – Alcohol Permit for 2016 Home Football Game – Suite Club Seating

BOARD ACTION

M/S (Critchfield/Goesling): To approve the request by the University of Idaho to allow alcohol service during the 2016 football season and during the spring 2017 football scrimmage, in the Litehouse Center/Bud and June Ford Club Room located in the ASUIKibbie Activity Center under the conditions outlined in Board Policy I.J. subsection 2. The motion carried unanimously.

18. Community College Trustee Zones

BOARD ACTION

M/S (Critchfield/Clark): To approve the community college district trustee zones legal description submitted by the College of Southern Idaho as submitted in Attachment 1. The motion carried unanimously.

M/S (Critchfield/Goesling): To approve the community college district trustee zones legal description submitted by the North Idaho College as submitted in Attachment 2. The motion carried unanimously.

M/S (Critchfield/Clark): To approve the community college district trustee zones legal description submitted by the College of Western Idaho as submitted in Attachment 3. The motion carried unanimously.

Ms. Critchfield indicated today's motions would approve the community college trustee zones.

BUSINESS AFFAIRS & HUMAN RESOURCES

Section I – Human Resources

1. Chief Executive Officer Employment Agreements/Terms

The Board's Executive Director has completed the performance evaluations for the administrators of the Division of Career-Technical Education and the Division of Vocational Rehabilitation. Salary recommendations for these positions are based on the evaluations and the individual agencies' Division of Financial Management approved compensation plans.

BOARD ACTION

M/S (Westerberg/Goesling): To approve an hourly rate of $69.60 (annual salary of $144,768.00) for Matt Freeman as Executive Director of the State Board of Education, effective June 5, 2016. The motion carried unanimously.

AND

M/S (Westerberg/Clark): To approve an hourly rate of $54.47 (annual salary of $113,297.60) for Dwight Johnson as Administrator of the Division of Career-Technical Education, effective June 5, 2016. The motion carried unanimously.

AND

M/S (Westerberg/Hill): To approve an hourly rate of $49.49 (annual salary of $102,939.20) for Jane Donnellan as Administrator of the Division of Vocational Rehabilitation, effective May 8, 2016. The motion carried unanimously.

AND

M/S (Westerberg/Atchley): To approve an hourly rate of $51.55 (annual salary of $107,224.00) for Ron Pisaneschi as General Manager of Idaho Public Television, effective June 5, 2016. The motion carried unanimously.

AND

M/S (Westerberg/Goesling): To approve an annual salary for Dr. Robert Kustra as President of Boise State University in the amount of $396,561.73, effective June 5, 2016. The motion carried unanimously.

AND

M/S (Westerberg/Hill): To approve an annual salary for Dr. Art Vailas, as President of Idaho State University, in the amount of $381,521.19, effective June 5, 2016. The motion carried unanimously.

AND

M/S (Westerberg/Atchley): To approve an annual salary for Dr. Chuck Staben, as President of the University of Idaho, in the amount of $374,010.00, effective June 5, 2016. The motion carried unanimously.

AND

M/S (Westerberg/Clark): To approve an annual salary for Dr. Tony Fernandez as President of Lewis-Clark State College in the amount of $218,628.47, effective June 5, 2016. The motion carried unanimously.

2. Amendment to Board Policy – Sections II.B., II.F. and II.H. – Coaches and Athletic Directors – Second reading

BOARD ACTION

M/S (Westerberg/Atchley): To approve the second reading of the proposed amendments to Board Policy Section II.H "Coaches and Athletic Directors"; Board Policy Section II.B "Appointment Authority and Procedures"; and Board Policy Section II.F "Policies Regarding Non-classified Employees" as provided in Attachments 1, 2 and 3. The motion carried unanimously.

And

M/S (Westerberg/Goesling): To approve the amendments to the single-year and multi-year model contracts as provided in Attachments 4 and 5. The motion carried unanimously

Mr. Westerberg indicated there have been no substantial changes between first and second reading.

3. University of Idaho – Multi-Year Employment Agreement – Men's Football Team Head Coach

BOARD ACTION

M/S (Westerberg/Goesling): To approve the request by the University of Idaho to enter into a four and one-half year employment agreement with Paul Petrino, as Head Men's Football Coach, for a fixed term expiring December 31, 2020 with an annual base salary of $178,526.40 and such contingent base salary increases, annual media payments, and incentive/supplemental compensation provisions as set forth in Attachment 2. The motion carried unanimously.

Mr. Westerberg pointed out the motion extends the contract to four and one half years with essentially the same contract terms.

Section II – Finance

1. Amendment to Board Policy – Section V.X. – Intercollegiate Athletics – Second reading

BOARD ACTION

M/S (Westerberg/Atchley): To approve the second reading of proposed amendments to Board policy Section V.X., Intercollegiate Athletics, as presented in Attachment 1. The motion carried unanimously.

Mr. Westerberg indicated there were no changes between first and second reading.

2. FY 2017 Operating Budgets

BOARD ACTION

M/S (Westerberg/Atchley): To approve the FY 2017 operating budgets for the Office of the State Board of Education, Idaho Public Television, Division of Vocational Rehabilitation, College and Universities, Postsecondary Professional-Technical Education, Agricultural Research & Extension Service, Health Education Programs and Special Programs, as presented. The motion carried unanimously.

Mr. Westerberg indicated this motion approves the FY17 operating budgets. Mr. Chet Herbst reviewed the process for developing the operating budgets and the amount of work that goes into them by the institutions and agencies. This year they also accounted for the 27th payroll and program prioritization has also played an important role in how the budget is developed.

3. FY 2018 Line Items

BOARD ACTION

M/S (Westerberg/Hill): To direct the Business Affairs and Human Resources Committee to review the FY 2018 budget line items as listed on the Line Items Summary at Tab 3 pages 3-4, and to bring recommendations back to Board for its consideration at the regular August 2016 Board meeting. The motion carried unanimously.

4. Idaho National Laboratory – Lease Expansions Update

Mr. Westerberg indicated this informational update complements yesterday's visit to the INL facilities and viewing of potential construction sites for the proposed buildings. Mr. Chet Herbst provided some additional information on the item and reintroduced Mr. Van Briggs to review any additional details for the Board. Mr. Herbst reviewed the key points for the Board to consider, including the climate of the present bond market. The Idaho State Building Authority would provide construction management of the project and also oversee the financing of the project. The facilities would increase opportunities for Idaho students and support leading-edge research missions of the institutions, and have a positive economic impact for Idaho and its education system. Mr. Herbst reviewed next steps for the Board and outlined the formation of a working group/coordination team to support BAHR and the Board in exploration of the project. Members of the working group would include Board members and staff, INL, ISBA, institutional representatives, Governor's office and legislative officers.

Mr. Westerberg felt it the options developed by the work group would be ready to be considered by the Board at the August meeting. Mr. Soltman requested that Board members Atchley and Hill participate as members on the working group and develop recommendations for the August meeting. Dr. Hill reminded the group of the expeditious nature of this item. Dr. Hill was appointed as the chairman of the working group and enthusiastically accepted the assignment.

Dr. Clark asked for a prioritization of the site options. Mr. Briggs recapped those preferences and that "Site Option 3" was preferred, followed by site options 1, 2, and 4. He did clarify, though, that any of the site options would work. Dr. Hill requested Mr. Briggs get a requested site preference in order by the INL. Ms. Atchley asked for more information regarding the financing be made available to the Board. Dr. Goesling brought up the overall security of the facility. Mr. Briggs responded that there are a number of systems, alarms, and security measures for the facilities in place, specifically for the safety of the occupants, adding that the security budget from the Department of Energy is well over $110 million.

5. Idaho State University – Tuition Lock Initiative

BOARD ACTION

M/S (Westerberg/Atchley): To approve the request by Idaho State University to implement its proposed Tuition Lock initiative, as described above, beginning in the 2016-2017 academic year and continuing in subsequent years until such time as the University requests restructuring or termination of the initiative. The base tuition for eligible students in each new cohort of the University's Tuition Lock initiative will continue to be set annually by the Board. The motion carried unanimously.

Mr. Westerberg indicated this provides the detail for final approval for ISU's proposed tuition lock initiative.

6. University of Idaho – Marketing Agreement for Intercollegiate Athletics – Learfield Communications

BOARD ACTION

M/S (Westerberg/Atchley): To authorize the University of Idaho to complete negotiations on a contract with Learfield Communications, Inc. for Intercollegiate Athletic promotions, sponsorships and corporate rights; and, upon completion of contract negotiations, to authorize the Executive Director of the Board to approve the final contract before execution by the University. The motion carried unanimously.

Mr. Westerberg indicated this is a request from the University of Idaho for a contract with Learfield Communications for promotion and multi-media rights for athletic promotions.

7. University of Idaho – Disposal of Real Property – Aberdeen Research and Extension Center

BOARD ACTION
M/S (Westerberg/Hill): To approve the request by the University of Idaho to dispose of the 0.7 acres of farm land referenced in Attachment 2 for the appraised value of $1,000; and further to authorize the University's Vice President for Infrastructure to execute all necessary transaction documents for conveying this real property. The motion carried unanimously.

Mr. Westerberg indicated this item is requesting the disposal of some real property at Aberdeen Research and Extension Center and provided history on the property. The property's effective separation from UI's use ever when the fence was originally constructed makes it poorly suited either for research or any other economic use by UI. Approval of the request will allow the UI to dispose of the referenced property.

8. Lewis-Clark State College – Spalding Hall Construction Project

BOARD ACTION

M/S (Westerberg/Clark): To approve the request by Lewis-Clark State College to proceed with planning and design for the upgrade of Spalding Hall, under project management provided by the Division of Public Works, for a projected cost of $4,000,000 funded through Agency and Permanent Building Fund, as described in Attachments 1 and 2. The motion carried unanimously.

AND

M/S (Westerberg/Goesling): To approve the revision to the FY2017 portion of Lewis-Clark State College's six-year capital plan as submitted in Attachment 4. The motion carried unanimously.

Mr. Herbst provided that LCSC is requesting Board approval to proceed with planning and design of an expanded-scope renovation project for the Spalding Hall facility on the College's Normal Hill campus in Lewiston. He provided details of the expanded scope of the project and that LCSC has been working with the Division of Public Works (DPW) on it. An updated capital plan will be submitted to the Board in August and when the planning and design is complete, it will also come before the Board for approval to proceed with construction.

At this time they moved to the IRSA portion of the agenda before proceeding with the Department's portion of the agenda.

INSTRUCTION, RESEARCH & STUDENT AFFAIRS

1. Amendment to Board Policy – Section III.T. Student Athletes – Second Reading

BOARD ACTION

M/S (Hill/Atchley): To approve the second reading of amendment to Board policy III.T.6, as presented in Attachment 1. The motion carried unanimously.

Dr. Hill indicated there has been one technical change to the policy which is the insertion of the word "shall". The proposed amendments expand the reporting requirements from incidents that led to a conviction to those that are likely to lead to a legal investigation, and should improve the responsiveness and timeliness of reports on student athletic conduct issues to the Board and better reflect the capabilities of current communication modes.

2. Boise State University – Master of Science in Biomolecular Sciences

BOARD ACTION

M/S (Hill/Clark): To approve the request by Boise State University to create a new academic program that will award a Master of Science in Biomolecular Sciences

in substantial conformation to the proposal submitted in Attachment 1. The motion carried unanimously.

Dr. Hill indicated BSU proposes to create a new program that will award a Master of Science (MS) degree in Biomolecular Sciences. The proposed program will be offered face-to-face in BSU's regional service area, and will require no additional resources because it will make use of existing courses already being taught in the existing Ph.D. in Biomolecular Sciences program.

3. Boise State University – Ph.D. in Computing

BOARD ACTION

M/S (Hill/Westerberg): To approve the request by Boise State University to create a new academic program that will award a Ph.D. in Computing in substantial conformance to the program proposal submitted as Attachment 1. The motion carried unanimously.

Dr. Hill indicated BSU proposes to create a new interdisciplinary program that will award a Ph.D. in Computing. He pointed out the importance of such programs, and that this proposed program will be offered face-to-face in BSU's regional service area. Investment in the creation of a Ph.D. in Computing will yield a wide range of substantial benefits such as training interdisciplinary scientists to use computing theories and engineering principles to contribute to research and solve applied problems.

4. Boise State University – Online, Bachelor of Applied Science Program

BOARD ACTION

M/S (Hill/Westerberg): To approve the request by Boise State University to create an online option for their existing, degree-completion program that will award an online Bachelor of Applied Science in substantial conformance with the program proposal provided as Attachment 1. The motion carried unanimously,

M/S (Hill/Westerberg): To approve the request by Boise State University to designate an online program fee for the Bachelor of Applied Science of $297 per credit. The motion carried unanimously.

Dr. Hill indicated BSU proposes to create an online option for its existing, degree-completion program that awards a Bachelor of Applied Science (BAS) degree. Dr. Mathias reported that this would be the first online option for this program and it has been reviewed by the Technical Deans Council. Students will enter the program with a technical associate's degree (an AAS), and will graduate with an academic baccalaureate degree that builds on the foundation of the technical associate's degree. Dr. Schimpf added this is part of BSU's e-campus initiative designed to bring more undergraduate degree programs fully online to broaden access.

5. Boise State University – Online, Bachelor of Arts, Multidisciplinary Studies

BOARD ACTION

M/S (Hill/Atchley): To approve the request by Boise State University to create a new online, degree-completion program that will award a Bachelor of Arts in Multidisciplinary Studies in substantial conformance to the program proposal submitted as Attachment 1. The motion carried unanimously.

M/S (Hill/Goesling): To approve the request by Boise State University to designate an online program fee for the Bachelor of Arts in Multidisciplinary Studies in the amount of $297 per credit in conformance with the program budget submitted to the Board in Attachment 1. The motion carried unanimously.

Dr. Hill indicated BSU proposes to create an online option for its existing, degree-completion program that awards a Bachelor of Arts in Multidisciplinary Studies. Dr. Clark applauded BSU for targeting adult learners.

6. College of Western Idaho (CWI) – Construction Technology

BOARD ACTION

M/S (Hill/Atchley): To approve the request by the College of Western Idaho to offer a new Construction Technology program in substantial conformance to the proposal provided in Attachment 1. The motion carried unanimously.

Dr. Shellberg from CWI introduced the program which is a new Construction Technology program offering an AAS degree and an Intermediate Technical Certificate to students upon completion of program requirements. He reported on the market demand for the industry and that they are estimating over the next 3-5 years a need for 7,000 workers in the construction field. He indicated they are repurposing funds from a less successful program to begin this new program in the Fall of 2017.

7. North Idaho College – Aerospace Technology Substantive Program Changes

BOARD ACTION

M/S (Hill/Atchley): To approve the request by North Idaho College to make substantive changes to the Aerospace Technology program in substantial conformance to those specified in Attachment 1. The motion carried unanimously.

Ms. Lita Burns from NIC provided background on the program which began in 2014. After some initial cohorts went through the program they realized some changes were necessary. Ms. Burns summarized changes to the program which included reducing the total number of credits required for the AAS degree from 62 to 60. The courses have been made more efficient and provide more opportunities for students to customize their training in this area to meet specific industry needs. Additionally some of the courses are able to be taught as dual credit courses in the high schools.

At this time they returned to the Department's portion of the agenda.

DEPARTMENT OF EDUCATION (SDE, Department)

1. Superintendent's Update

Superintendent Ybarra provided an update on some recent work of the Department, reporting on the success of the *Idaho Challenge* which relates to the standards in English Language Arts (ELA) and Math. Overall stakeholder feedback indicated 86% support in ELA and 90% in Math. She reported that related to legislation, they intend to stay focused on rural schools. She also reported they have a new Chief Policy liaison, Duncan Robb, joining the Department soon. Superintendent Ybarra discussed challenges with the teacher shortage, which is a national issue, and strategies to help teachers. She reported on scores in ELA and Math, and that Math is not where they would like it to be and ELA is making gains. The budgeting process will begin in July and they will start meeting with stakeholders and the Governor's office, and she provided highlights on the Departments focus areas.

Mr. Freeman reminded the Board and Superintendent related to the teacher shortage situation of the resources in the Troops to Teachers program.

2. Proposed Rule – IDAPA 08.02.02.004.02, Standards for Idaho School Buses and Operations

BOARD ACTION

M/S (Ybarra/Goesling): To approve the revisions to the Standards for Idaho School Buses and Operations as submitted in Attachment 2. The motion carried unanimously.

M/S (Ybarra/Atchley): To approve the Proposed Rule amendment to IDAPA 08.02.02.004.02, Rules Governing Uniformity, Standards for Idaho School Buses and Operations, as submitted in Attachment 1. The motion carried unanimously.

Ms. Ybarra indicated this proposed rule reflects a new approval date of the Standards for Idaho School Buses and Operations by the Board.

3. Proposed Rule – IDAPA 08.02.02.004.03, Operating Procedures for Idaho Public Driver Education Programs

BOARD ACTION

M/S (Ybarra/Clark): To approve the proposed changes to the Operating Procedures for Idaho Public Driver Education Programs as submitted in Attachment 2. The motion carried unanimously.

M/S (Ybarra/Hill): To approve the Proposed Rule amendment to IDAPA 08.02.02.004.03, Rules Governing Uniformity, Incorporation by Reference, as submitted in Attachment 1. The motion carried unanimously.

4. Proposed Rule – IDAPA 08.02.02.004, .015, .022, .023, and .024, Idaho Standards for the Initial Certification of Professional School Personnel

BOARD ACTION

M/S (Ybarra/Hill): To approve the proposed revisions to the Idaho Standards for Initial Certification of Professional School Personnel as submitted in Attachment 2. The motion carried unanimously.

M/S (Ybarra/Hill): To approve the proposed rule amendments to IDAPA 08.02.02.004, .015, .022, .023, and .024, Rules Governing Uniformity, as submitted in Attachment 1. The motion carried unanimously.

Ms. Ybarra indicated this proposed rule is for the Idaho Standards for Initial Certification of Professional School Personnel.

Ms. Atchley asked if we feel these standards are set high enough. Ms. Ybarra responded they went through a lengthy and rigorous process in setting the standards. Ms. Lisa Colon reviewed the process they exercised with the PSC in reviewing and revising the standards. Dr. Clark commented supportively of the process and work reflected in the standards.

5. Proposed Rule – IDAPA 08.02.02.111, Bullying, Harassment and Intimidation

BOARD ACTION

M/S (Ybarra/Goesling): To approve the Proposed Rule amendment to IDAPA 08.02.02, creating a new section 111, Rules Governing Uniformity, Bullying, Harassment and Intimidation Prevention, as submitted in Attachment 1. The motion carried unanimously.

Ms. Ybarra introduced the proposed rule which is related to bullying, harassment, and intimidation. She added that this proposed rule was vetted through the negotiated rulemaking process in which they conducted six meetings throughout the state in April 2016. The limited feedback received was either for clarification or in favor of the rule. Mr. Matt McCarter was available for questions.

6. Proposed Rule – IDAPA 08.02.03.004.01 and 08.02.03.109, Special Education Revisions

BOARD ACTION

M/S (Ybarra/Atchley): To approve the revised Idaho Special Education Manual as submitted in Attachment 2. The motion carried unanimously

M/S (Ybarra/Critchfield): To approve the Proposed Rule amendment to IDAPA 08.02.03.004 and 08.02.03.109, Rules Governing Thoroughness, as submitted in Attachment 1. The motion carried unanimously.

Ms. Ybarra introduced the proposed rule which is related to revisions to the Idaho Special Education manual and other special education language in rule. Dr. Charlie Silva from the Department was available for questions.

7. Proposed Rule – IDAPA 08.02.03.110, Alternative Secondary Programs

BOARD ACTION

M/S (Ybarra/Critchfield): To approve the Proposed Rule amendment to IDAPA 08.02.03.110, Rules Governing Thoroughness, Alternative Secondary Programs, as submitted in Attachment 1. The motion carried unanimously.

Ms. Ybarra indicated this proposed rule change will update the rules governing Alternative Secondary Programs and relates to at-risk students and helps to better identify and give support to those students. Mr. Tim McMurtrey was available for questions.

At this time the meeting returned to the item pulled from the Consent Agenda and added to the Department's agenda, which deals with Idaho State University.

DEPARTMENT OF EDUCATION (from Consent Agenda)

12. Idaho State University Program Review

BOARD ACTION

M/S (Ybarra/Critchfield): To adopt the recommendation by the Professional Standards Commission and to accept the State Team Report for Idaho State University as submitted, and to grant Conditional Approval based on the additional documentation submitted by Idaho State University for their English, English as a New Language, and Economics programs. And I move to direct ISU to provide an update on improvements to their teacher preparation program, as discussed, at the August 2017 Board meeting. The motion carried unanimously.

Ms. Critchfield clarified the reasoning for pulling the item from consent agenda, pointing out that ISU is refreshing their College of Education and exploring how they can improve their program. She offered an amended motion that includes a conditional approval based on what was submitted, and includes a request to provide the Board with an update on the improvements and changes. She commended ISU for reviewing its programs.

Dr. Woodworth-Ney provided that ISU has been working to review all of the programs at the College of Education and have transitioned their leadership team at the College of Education as well. They indicated they plan to bring forward a comprehensive report in August of 2017 relative to the college and the transition of programs. She added this was one of the recommendations from the National Council for Accreditation of Teacher Education (NCATE).

ELECTION OF OFFICERS

BOARD ACTION

M/S (Westerberg/Hill): To appoint Emma Atchley as Board President, Linda Clark as Vice President, and Debbie Critchfield as Secretary. The motion carried unanimously. The positions of the new officers take effect immediately.

Mr. Westerberg remarked on behalf of the Board, offering thanks to Mr. Soltman for the exceptional job guiding the Board through the last year. Mr. Soltman also recognized that this is the last meeting for Dr. Bill Goesling who has completed his five year term on the Board. Mr. Soltman presented Dr. Goesling with a plaque presented in appreciation of his passionate and dedicated service to the Board, and for his steadfast support of Indian Education and Veterans in Idaho. Dr. Goesling thanked the other Board members, staff, and institution staff for their good work and the privilege of working with them.

OTHER BUSINESS

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

M/S (Atchley/Critchfield): To adjourn the meeting at 11:45 a.m. The motion carried unanimously.

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TAB	DESCRIPTION	ACTION
A	**PPGA – DATA DASHBOARD DISCUSSION**	Information Item
B	**PPGA – HIGHER EDUCATION ACTION PLAN**	Information Item

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SUBJECT

Data Dashboard Discussion

REFERENCE

January 2016	Release of the 2015 IPEDS Data Feedback Reports.
April 2016	Each year, the state of Idaho pays for every public high school junior to take the SAT in April.
July 2016	Release of the April SAT test day results.

BACKGROUND/DISCUSSION

This item will provide an opportunity for the Board to discuss potential data points that would be available in an Idaho Education dashboard. Staff will discuss examples of two specific data sources to help frame the discussion, the Integrated Postsecondary Education Data System (IPEDS) data feedback reports and SAT test day data.

The IPEDS reports are put together by the National Center for Education Statistics who compare the institution to the institution's selected peers. The peers included in this example report exclude the aspirational peers of Idaho State University (ISU). The IPEDS Data Feedback Report offers a comparative look for measures including enrollment, completion, tuition and fee rates, net price, and graduation rates, and is available for each of our institutions.

This item also includes a presentation of the 2016 April SAT test day data and patterns found in the data. This discussion will cover:

- The SAT data dashboard
- Patterns in SAT test scores by gender
- Patterns in SAT test scores by region
- Patterns in SAT test scores by urbanicity
- Future use of SAT test scores

Examples of data dashboards created by other education boards will be presented and discussed.

IMPACT

Public-facing data dashboards allow state policy makers, parents, students, school administrators, and institution staff access to reports produced using data collected in the Statewide Longitudinal Data System (SLDS). These dashboards will assist in determining the overall "health" of the education system or specific schools or institutions through a transparent tool.

ATTACHMENTS

Attachment 1 – 2015 IPEDS Data Feedback Report – ISU Page 3

STAFF COMMENTS AND RECOMMENDATIONS

This item will give the Board an opportunity to discuss what data the Board would like to have published in data dashboards for Idaho.

BOARD ACTION

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

NATIONAL CENTER FOR EDUCATION STATISTICS

IPEDS DATA FEEDBACK REPORT 2015

What Is IPEDS?

The Integrated Postsecondary Education Data System (IPEDS) is a system of survey components that collects data from about 7,500 institutions that provide postsecondary education across the United States. IPEDS collects institution-level data on student enrollment, graduation rates, student charges, program completions, faculty, staff, and finances.

These data are used at the federal and state level for policy analysis and development; at the institutional level for benchmarking and peer analysis; and by students and parents, through the College Navigator (http://collegenavigator.ed.gov), an online tool to aid in the college search process. For more information about IPEDS, see http://nces.ed.gov/ipeds.

What Is the Purpose of This Report?

The Data Feedback Report is intended to provide institutions a context for examining the data they submitted to IPEDS. The purpose of this report is to provide institutional executives a useful resource and to help improve the quality and comparability of IPEDS data.

What Is in This Report?

As suggested by the IPEDS Technical Review Panel, the figures in this report provide selected indicators for your institution and a comparison group of institutions. The figures are based on data collected during the 2014-15 IPEDS collection cycle and are the most recent data available. This report provides a list of pre-selected comparison group institutions and the criteria used for their selection. Additional information about these indicators and the pre-selected comparison group are provided in the Methodological Notes at the end of the report.

Where Can I Do More with IPEDS Data?

Each institution can access previous Data Feedback Reports as far back as 2005 and customize this latest report by using a different comparison group and IPEDS variables of its choosing. To download archived reports or customize the current Data Feedback Report (DFR), please visit our web site at http://nces.ed.gov/ipeds/Home/UseTheData.

Idaho State University
Pocatello, ID

COMPARISON GROUP

Comparison group data are included to provide a context for interpreting your institution's statistics. If your institution did not define a custom comparison group for this report by July 17, NCES selected a comparison group for you. (In this case, the characteristics used to define the comparison group appears below.) The Customize Data Feedback Report functionality on the IPEDS Data Center (http://nces.ed.gov/ipeds/datacenter/) can be used to reproduce the figures in this report using different peer groups.

The custom comparison group chosen by Idaho State University includes the following 13 institutions:

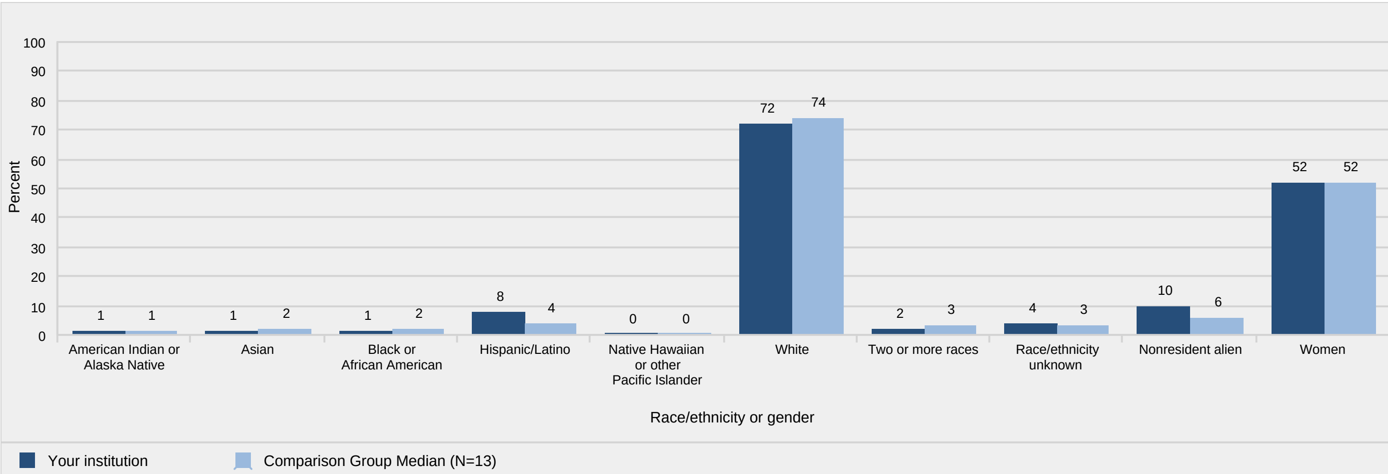
- Kent State University at Kent (Kent, OH)
- Montana State University (Bozeman, MT)
- North Dakota State University-Main Campus (Fargo, ND)
- Northern Arizona University (Flagstaff, AZ)
- Northern Illinois University (Dekalb, IL)
- South Dakota State University (Brookings, SD)
- The University of Montana (Missoula, MT)
- University of Nevada-Reno (Reno, NV)
- University of North Dakota (Grand Forks, ND)
- University of Oregon (Eugene, OR)
- University of South Dakota (Vermillion, SD)
- University of Wyoming (Laramie, WY)
- Wichita State University (Wichita, KS)

The figures in this report have been organized and ordered into the following topic areas:

1) Admissions (only for non-open-admissions schools),
2) Student Enrollment,
3) Awards,
4) Charges and Net Price,
5) Student Financial Aid,
6) Military Benefits*,
7) Retention and Graduation Rates,
8) Finance,
9) Staff, and
10) Libraries*.

*These figures only appear in customized Data Feedback Reports (DFR), which are available through Use the Data portal on the IPEDS website.

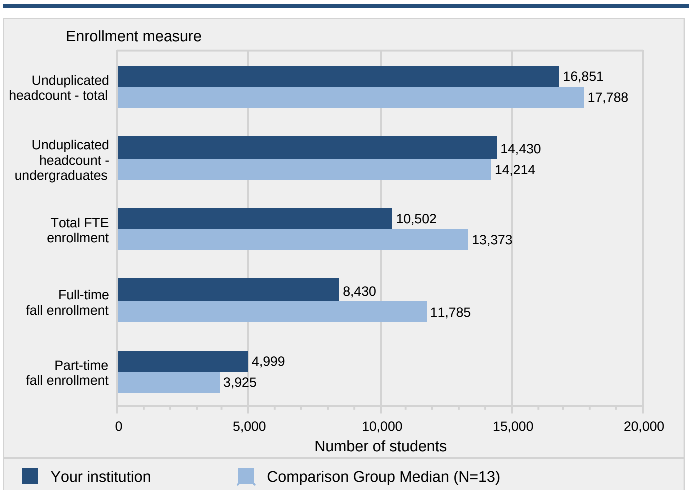
Figure 1. Percent of all students enrolled, by race/ethnicity, and percent of students who are women: Fall 2014



NOTE: For more information about disaggregation of data by race and ethnicity, see the Methodological Notes. Median values for the comparison group will not add to 100%. See "Use of Median Values for Comparison Group" for how median values are determined. N is the number of institutions in the comparison group.

SOURCE: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS): Spring 2014, Fall Enrollment component.

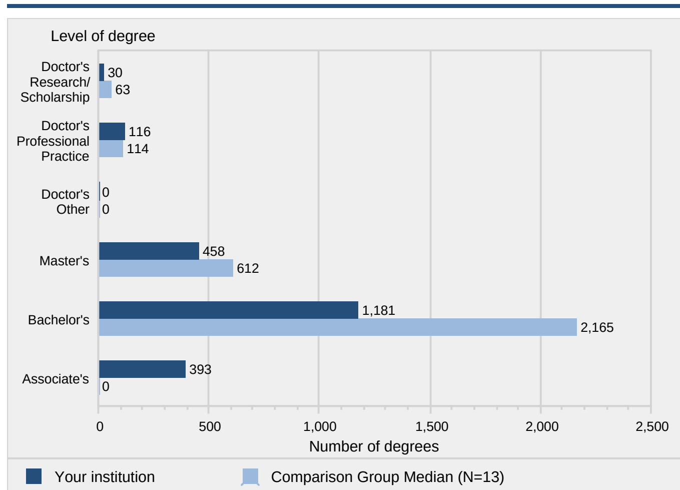
Figure 2. Unduplicated 12-month headcount of all students and of undergraduate students (2013-14), total FTE enrollment (2013-14), and full- and part-time fall enrollment (Fall 2014)



NOTE: For details on calculating full-time equivalent (FTE) enrollment, see Calculating FTE in the Methodological Notes. Total headcount, FTE, and full- and part-time fall enrollment include both undergraduate and postbaccalaureate students, when applicable. N is the number of institutions in the comparison group.

SOURCE: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS): Fall 2014, 12-month Enrollment component and Spring 2015, Fall Enrollment component.

Figure 3. Number of degrees awarded, by level: 2013-14

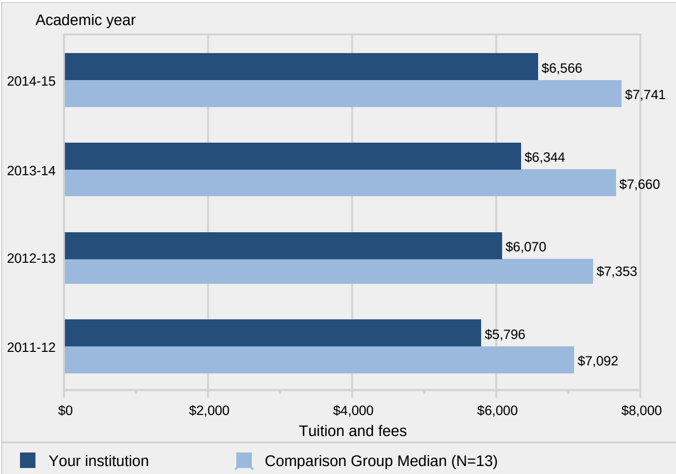


NOTE: For additional information about postbaccalaureate degree levels, see the Methodology Notes. N is the number of institutions in the comparison group.

SOURCE: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS): Fall 2014, Completions component.

IPEDS DATA FEEDBACK REPORT

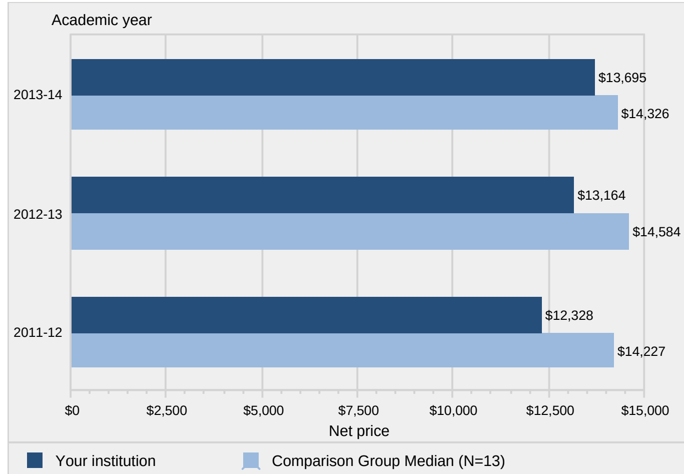
Figure 4. Academic year tuition and required fees for full-time, first-time degree/certificate-seeking undergraduates: 2011-12 to 2014-15



NOTE: The tuition and required fees shown here are the lowest reported from the categories of in-district, in-state, and out-of-state. N is the number of institutions in the comparison group.

SOURCE: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS): Fall 2014, Institutional Characteristics component.

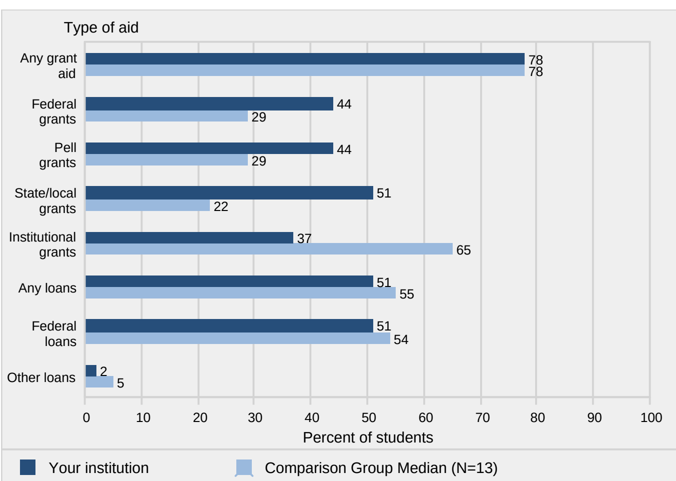
Figure 5. Average net price of attendance for full-time, first-time degree/certificate-seeking undergraduate students receiving grant or scholarship aid: 2011-12 to 2013-14



NOTE: Average net price is for full-time, first-time degree/certificate-seeking undergraduate students and is generated by subtracting the average amount of federal, state/local government, and institutional grant and scholarship aid from the total cost of attendance. Total cost of attendance is the sum of published tuition and required fees, books and supplies, and the average room and board and other expenses. For details, see the Methodological Notes. N is the number of institutions in the comparison group.

SOURCE: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS): Fall 2014, Institutional Characteristics component; Winter 2014-15, Student Financial Aid component.

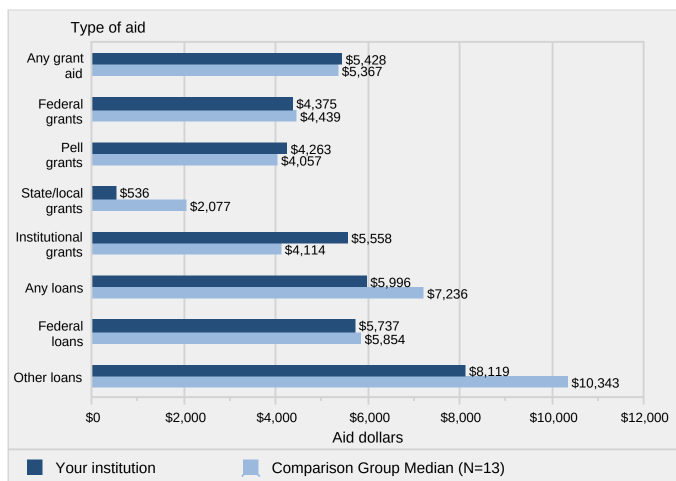
Figure 6. Percent of full-time, first-time degree/certificate-seeking undergraduate students who received grant or scholarship aid from the federal government, state/local government, or the institution, or loans, by type of aid: 2013-14



NOTE: Any grant aid above includes grant or scholarship aid from the federal government, state/local government, or the institution. Federal grants includes Pell grants and other federal grants. Any loans includes federal loans and other loans to students. For details on how students are counted for financial aid reporting, see Cohort Determination in the Methodological Notes. N is the number of institutions in the comparison group.

SOURCE: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS): Winter 2014-15, Student Financial Aid component.

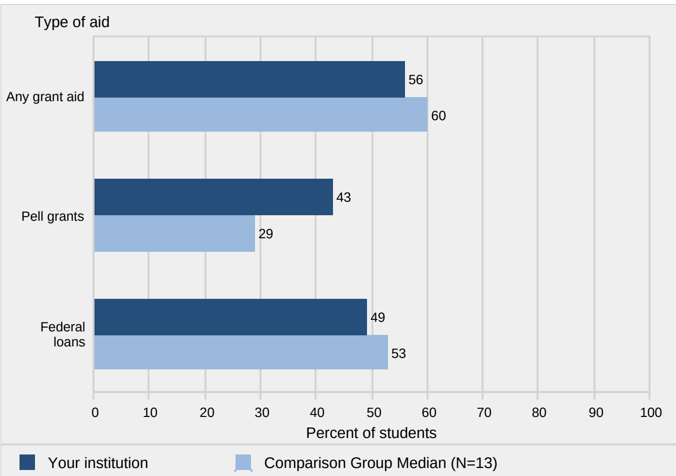
Figure 7. Average amounts of grant or scholarship aid from the federal government, state/local government, or the institution, or loans received for full-time, first-time degree/certificate-seeking undergraduate students, by type of aid: 2013-14



NOTE: Any grant aid above includes grant or scholarship aid from the federal government, state/local government, or the institution. Federal grants includes Pell grants and other federal grants. Any loans includes federal loans and other loans to students. Average amounts of aid were calculated by dividing the total aid awarded by the total number of recipients in each institution. N is the number of institutions in the comparison group.

SOURCE: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS): Winter 2014-15, Student Financial Aid component.

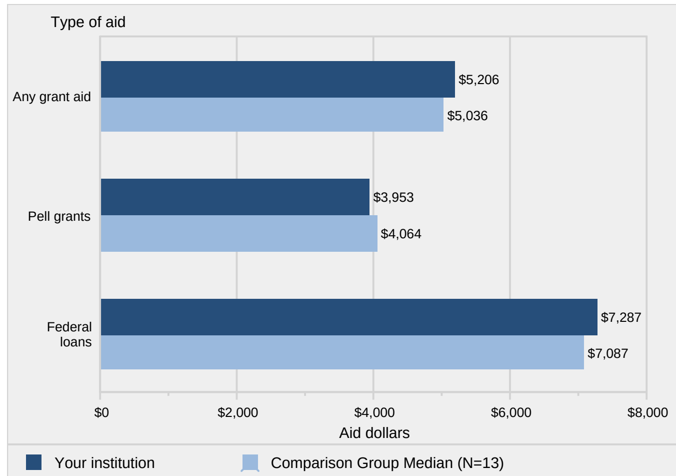
Figure 8. Percent of all undergraduates receiving aid, by type of aid: 2013-14



NOTE: Any grant aid above includes grant or scholarship aid from the federal government, state/local government, the institution, or other sources. Federal loans includes only federal loans to students. N is the number of institutions in the comparison group.

SOURCE: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS): Winter 2014-15, Student Financial Aid component.

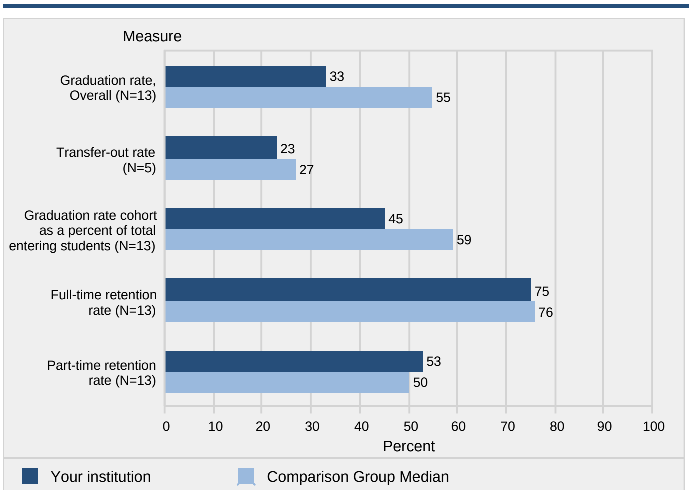
Figure 9. Average amount of aid received by all undergraduates, by type of aid: 2013-14



NOTE: Any grant aid above includes grant or scholarship aid from the federal government, state/local government, the institution, or other sources. Federal loans includes federal loans to students. Average amounts of aid were calculated by dividing the total aid awarded by the total number of recipients in each institution. N is the number of institutions in the comparison group.

SOURCE: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS): Winter 2014-15, Student Financial Aid component.

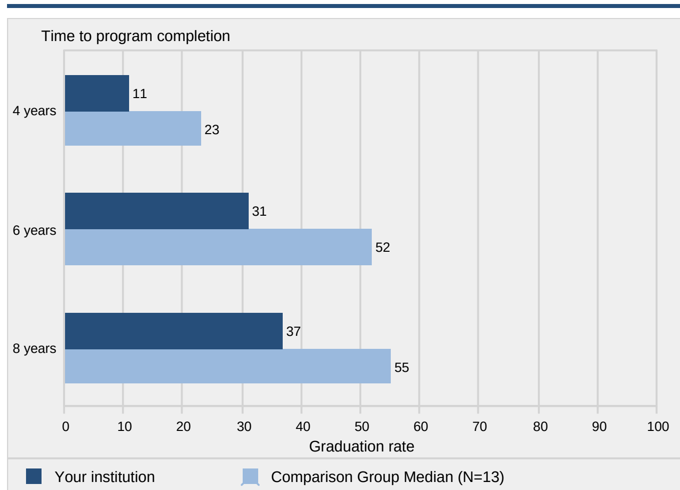
Figure 10. Graduation rate and transfer-out rate (2008 cohort); graduation rate cohort as a percent of total entering students and retention rates of first-time students (Fall 2014)



NOTE: Graduation rate cohort includes all full-time, first-time degree/certificate-seeking undergraduate students. Graduation and transfer-out rates are the Student Right-to-Know rates. Only institutions with mission to prepare students to transfer are required to report transfer out. Retention rates are measured from the fall of first enrollment to the following fall. Four-year institutions report retention rates for students seeking a bachelor's degree. For more details, see the Methodological Notes. N is the number of institutions in the comparison group.

SOURCE: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS): Winter 2014-15, Graduation Rates component and Spring 2014, Fall Enrollment component.

Figure 11. Bachelor's degree graduation rates of full-time, first-time degree/certificate-seeking undergraduates within 4 years, 6 years, and 8 years: 2006 cohort

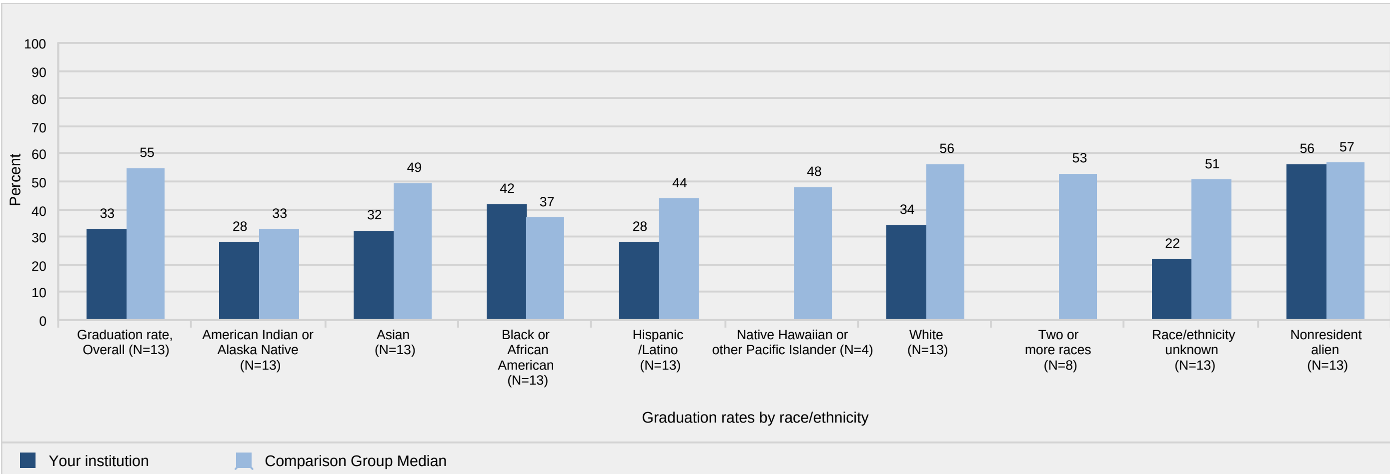


NOTE: The 6-year graduation rate is the Student Right-to-Know (SRK) rate; the 4- and 8-year rates are calculated using the same methodology. For details, see the Methodological Notes. N is the number of institutions in the comparison group.

SOURCE: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS): Winter 2014-15, 200% Graduation Rates component.

IPEDS DATA FEEDBACK REPORT

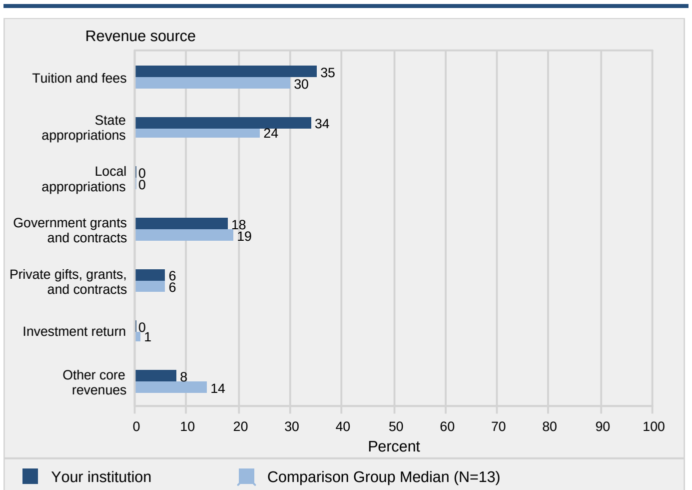
Figure 12. Graduation rates of full-time, first-time degree/certificate-seeking undergraduates within 150% of normal time to program completion, by race/ethnicity: 2008 cohort



NOTE: For more information about disaggregation of data by race and ethnicity, see the Methodological Notes. The graduation rates are the Student Right-to-Know (SRK) rates. Median values for the comparison group will not add to 100%. N is the number of institutions in the comparison group.

SOURCE: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS): Winter 2014-15, Graduation Rates component.

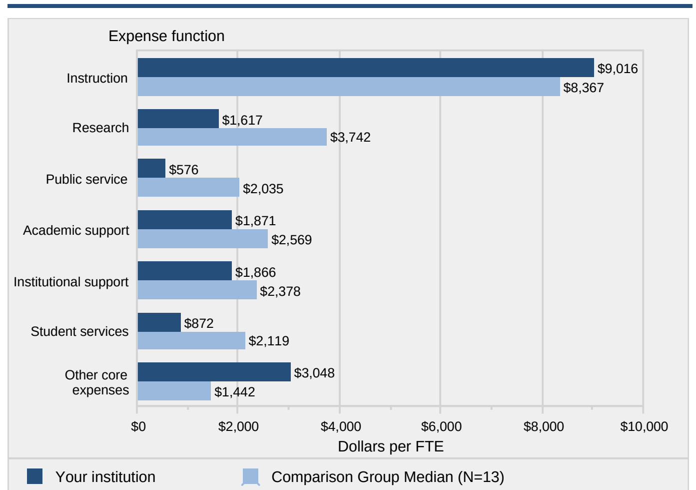
Figure 13. Percent distribution of core revenues, by source: Fiscal year 2014



NOTE: The comparison group median is based on those members of the comparison group that report finance data using the same accounting standards as the comparison institution. For a detailed definition of core revenues, see the Methodological Notes. N is the number of institutions in the comparison group.

SOURCE: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS): Spring 2014, Finance component.

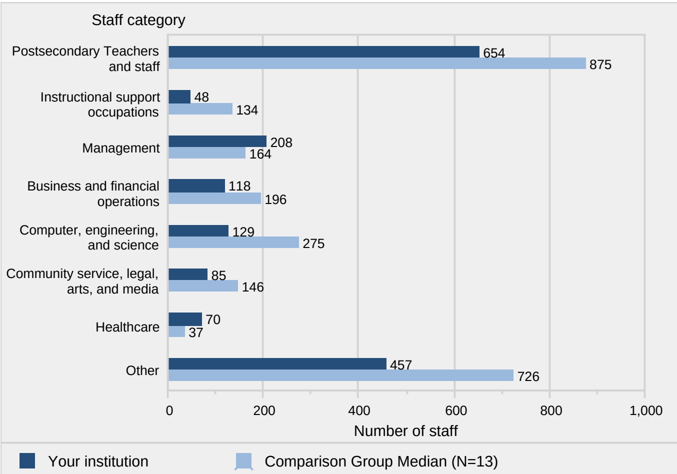
Figure 14. Core expenses per FTE enrollment, by function: Fiscal year 2014



NOTE: Expenses per full-time equivalent (FTE) enrollment, particularly instruction, may be inflated because finance data includes all core expenses while FTE reflects credit activity only. For details on calculating FTE enrollment and a detailed definition of core expenses, see the Methodological Notes. N is the number of institutions in the comparison group.

SOURCE: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS): Fall 2014, 12-month Enrollment component and Spring 2015, Finance component.

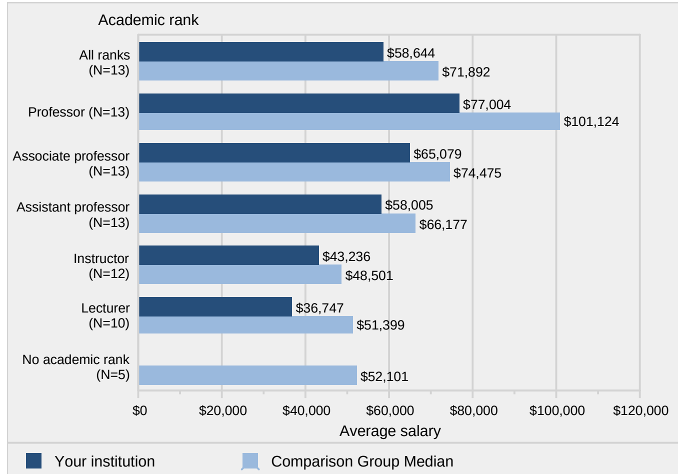
Figure 15. Full-time equivalent staff, by occupational category: Fall 2014



NOTE: Graduate assistants are not included. For calculation details, see the Methodological Notes. N is the number of institutions in the comparison group.

SOURCE: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS): Spring 2014, Human Resources component.

Figure 16. Average salaries of full-time instructional non-medical staff equated to 9-month contracts, by academic rank: Academic year 2014-15



NOTE: Average salaries of full-time instructional non-medical staff equated to 9-month contracts was calculated by multiplying the average monthly salary by 9. The average monthly salary was calculated by dividing the total salary outlays by the total number of months covered by staff on 9, 10, 11 and 12-month contracts.

SOURCE: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS): Spring 2014, Human Resources component.

IPEDS DATA FEEDBACK REPORT

METHODOLOGICAL NOTES

Overview

This report is based on data supplied by institutions to IPEDS during the 2014-15 data collection year. Response rates exceeded 99% for most surveys. Detailed response tables are included in IPEDS First Look reports, which can be found at http://nces.ed.gov/pubsearch/getpubcats.asp?sid=010.

Use of Median Values for Comparison Group

The value for the comparison institution is compared to the median value for the comparison group for each statistic included in the figure. If more than one statistic is presented in a figure, the median values are determined separately for each indicator or statistic. Medians are not reported for comparison groups with fewer than three values. Where percentage distributions are presented, median values may not add to 100%. To access all the data used to create the figures included in this report, go to 'Use the Data' portal on the IPEDS website (http://nces.ed.gov/ipeds).

Missing Statistics

If a statistic is not reported for your institution, the omission indicates that the statistic is not relevant to your institution and the data were not collected. Not all notes may be applicable to your report.

Use of Imputed Data

All IPEDS data are subject to imputation for total (institutional) and partial (item) nonresponse. If necessary, imputed values were used to prepare your report.

Data Confidentiality

IPEDS data are not collected under a pledge of confidentiality.

Disaggregation of Data by Race/Ethnicity

When applicable, some statistics are disaggregated by race/ethnicity. Data disaggregated by race/ethnicity have been reported using the 1997 Office of Management and Budget categories. Detailed information about the race/ethnicity categories can be found at http://nces.ed.gov/ipeds/reic/resource.asp.

Cohort Determination for Reporting Student Financial Aid and Graduation Rates

Student cohorts for reporting Student Financial Aid and Graduation Rates data are based on the reporting type of the institution. For institutions that report based on an academic year (those operating on standard academic terms), student counts and cohorts are based on fall term data. Student counts and cohorts for program reporters (those that do not operate on standard academic terms) are based on unduplicated counts of students enrolled during a full 12-month period.

Description of Statistics Used in the Figures

Admissions and Test Score Data
Admissions and test score data are presented only for institutions that do not have an open admission policy, and apply to first-time, degree/certificate-seeking undergraduate students only. Applicants include only those students who fulfilled all requirements for consideration for admission and who were notified of one of the following actions: admission, non-admission, placement on a wait list, or application withdrawn (by applicant or institution). Admitted applicants (admissions) include wait-listed students who were subsequently offered admission. Early decision, early action, and students who began studies during the summer prior to the fall reporting period are included. For customized Data Feedback Reports, test scores are presented only if they are required for admission.

Average Institutional Net Price

Average net price is calculated for full-time, first-time degree/certificate-seeking undergraduates who were awarded grant or scholarship aid from the federal government, state/local government, or the institution anytime during the full aid year. For public institutions, this includes only students who paid the in-state or in-district tuition rate. Other sources of grant aid are excluded. Average net price is generated by subtracting the average amount of federal, state/local government, and institutional grant and scholarship aid from the total cost of attendance. Total cost of attendance is the sum of published tuition and required fees, books and supplies, and the average room and board and other expenses.

For the purpose of the IPEDS reporting, aid received refers to financial aid that was awarded to, and accepted by, a student. This amount may differ from the aid amount that is disbursed to a student.

Core Revenues

Core revenues for public institutions reporting under GASB standards include tuition and fees; state and local appropriations; government grants and contracts; private gifts, grants, and contracts; sales and services of educational activities; investment income; other operating and non-operating sources; and other revenues and additions (federal and capital appropriations and grants and additions to permanent endowments). Core revenues for private, not-for-profit institutions (and a small number of public institutions) reporting under FASB standards include tuition and fees; government appropriations (federal, state, and local); government grants and contracts; private gifts, grants, and contracts (including contributions from affiliated entities); investment return; sales and services of educational activities; and other sources. Core revenues for private, for-profit institutions reporting under FASB standards include tuition and fees; government appropriations, grants, and contracts (federal, state, and local); private grants and contracts; investment income; sales and services of educational activities; and other sources. At degree-granting institutions, core revenues exclude revenues from auxiliary enterprises (e.g., bookstores, dormitories), hospitals, and independent operations. Nondegree-granting institutions do no report revenue from auxiliary enterprises in a separate category. These amounts may be included in the core revenues from other sources.

Core Expenses

Core expenses include expenses for instruction, research, public service, academic support, institutional support, student services, scholarships and fellowships (net of discounts and allowances), and other expenses. Expenses for operation and maintenance of plant, depreciation, and interest are allocated to each of the other functions. Core expenses at degree-granting institutions exclude expenses for auxiliary enterprises (e.g., bookstores, dormitories), hospitals, and independent operations. Nondegree-granting institutions do not report expenses for auxiliary enterprises in a separate category. These amounts may be included in the core expenses as other expenses.

Equated Instructional Non-Medical Staff Salaries

Institutions reported total salary outlays by academic rank and gender, and the number of staff by academic rank, contract length (9-, 10-, 11-, and 12-month contracts), and gender. The total number of months covered by salary outlays was calculated by multiplying the number of staff reported for each contract length period by the number of months of the contract, and summing across all contract length periods. The weighted average monthly salary for each academic rank and gender was calculated by dividing the total salary outlays by the total number of months covered. The weighted average monthly salary was then multiplied by 9 to determine an equated 9-month salary for each rank.

FTE Enrollment

The full-time equivalent (FTE) enrollment used in this report is the sum of the institution's FTE undergraduate enrollment and FTE graduate enrollment (as calculated from or reported on the 12-month Enrollment component). Undergraduate and graduate FTE are estimated using 12-month instructional activity (credit and/or contact hours). See "Calculation of FTE Students (using instructional activity)" in the IPEDS Glossary at http://nces.ed.gov/ipeds/glossary/.

FTE Staff

The full-time-equivalent (FTE) of staff is calculated by summing the total number of full-time staff and adding one-third of the total number of part-time staff. Graduate assistants are not included.

Graduation Rates and Transfer-out Rate

Graduation rates are those developed to satisfy the requirements of the Student Right-to-Know Act and Higher Education Act, as amended, and are defined as the total number of individuals from a given cohort of full-time, first-time degree/certificate-seeking undergraduates who completed a degree or certificate within a given percent of normal time to complete all requirements of the degree or certificate program before the ending status date of August 31, 2014; divided by the total number of students in the cohort of full-time, first-time degree/certificate-seeking undergraduates minus any allowable exclusions. Institutions are permitted to exclude from the cohort students who died or were totally and permanently disabled; those who left school to serve in the armed forces or were called up to active duty; those who left to serve with a foreign aid service of the federal government, such as the Peace Corps; and those who left to serve on an official church mission. Transfer-out rate is the total number of students from the cohort who are known to have transferred out of the reporting institution (without earning a degree/award) and subsequently re-enrolled at another institution within the same time period; divided by the same adjusted cohort (initial cohort minus allowable exclusions) as described above. Only institutions with a mission that includes providing substantial preparation for students to enroll in another eligible institution are required to report transfers out.

Retention Rates

Full-time retention rates is a measure of the rate at which students persist in their educational program at an institution, expressed as a percentage. For four-year institutions, this is the percentage of first-time bachelors (or equivalent) degree-seeking undergraduates from the previous fall who are again enrolled in the current fall. For all other institutions this is the percentage of first-time degree/certificate-seeking students from the previous fall who either re-enrolled or successfully completed their program by the current fall. The full-time retention rate is calculated using the percentage of full-time, first-time degree/certificate-seeking undergraduates, while the part-time rate is calculated using the percentage of part-time, first-time degree/certificate-seeking undergraduates.

Total Entering Undergraduate Students

Total entering students are students at the undergraduate level, both full- and part-time, new to the institution in the fall term (or the prior summer term who returned in the fall). This includes all first-time undergraduate students, students transferring into the institution at the undergraduate level, and non-degree/certificate-seeking undergraduates entering in the fall. Only degree-granting, academic year reporting institutions provide total entering student data.

Tuition and Required Fees

Tuition is defined as the amount of money charged to students for instructional services, and required fees are those fixed sum charges to students for items not covered by tuition that are required of such a large proportion of all students that the student who does not pay the charge is an exception. The amounts used in this report are for full-time, first-time degree/certificate-seeking undergraduates and are those used by the financial aid office to determine need. For institutions that have differential tuition rates for in-district or in-state students, the lowest tuition rate is used in the figure. Only institutions that operate on standard academic terms will have tuition figures included in their report.

Additional Methodological Information

Additional methodological information on the IPEDS components can be found in the publications available at http://nces.ed.gov/pubsearch/getpubcats.asp?sid=010.
Additional definitions of variables used in this report can be found in the IPEDS online glossary available at http://nces.ed.gov/ipeds/glossary/.

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Idaho State University
IPEDS Data Feedback Report

August 10, 2016

Idaho State Board of Education

ISU Peers

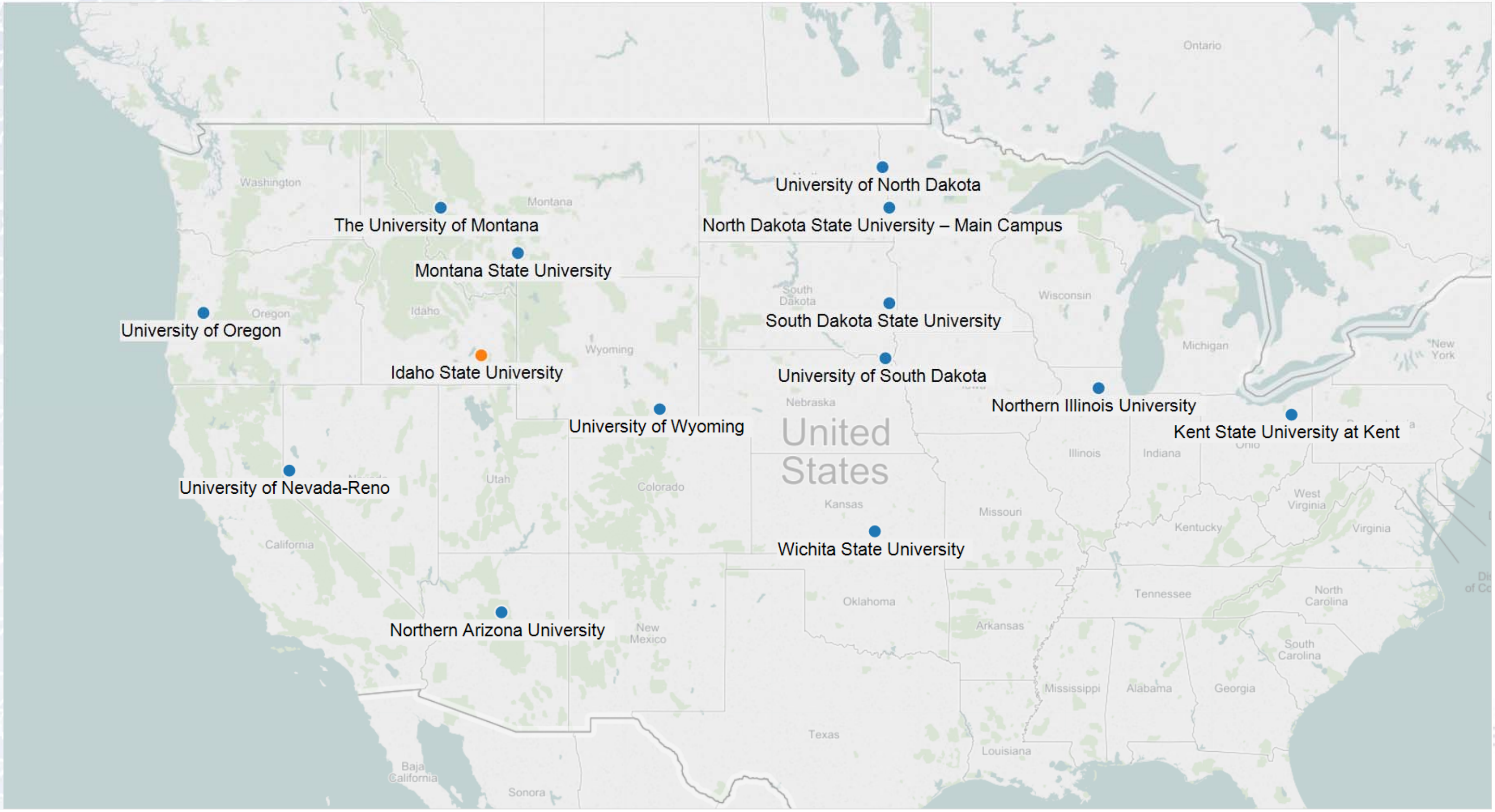
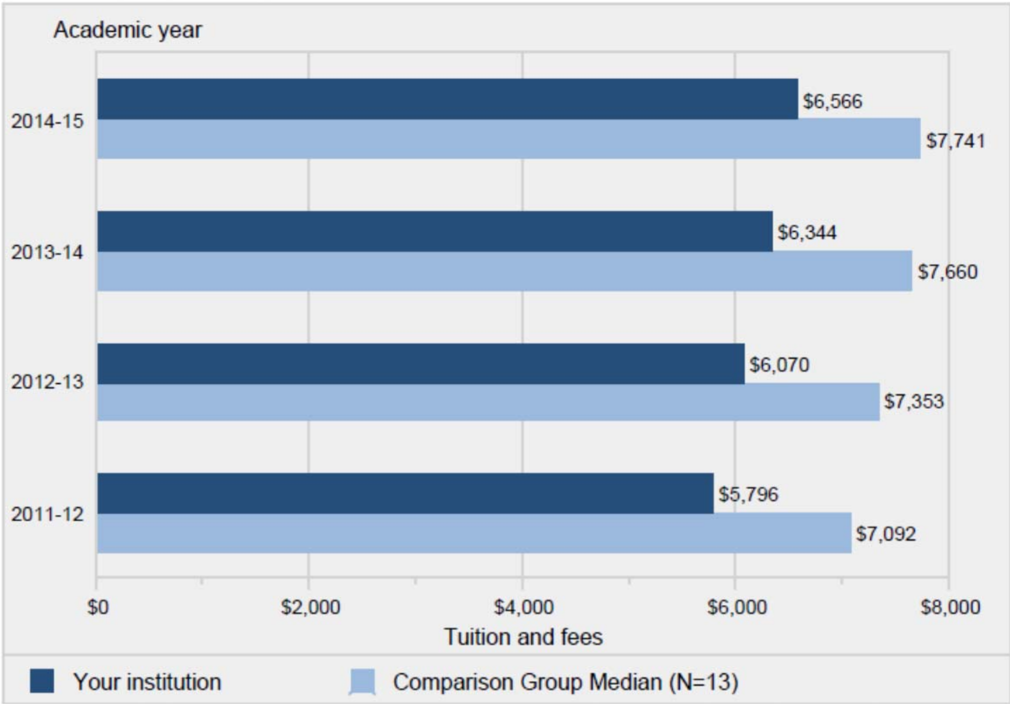

University of North Dakota
The University of Montana
North Dakota State University – Main Campus
Montana State University
University of Oregon
South Dakota State University
Idaho State University
University of South Dakota
Northern Illinois University
Kent State University at Kent
University of Wyoming
United States
University of Nevada-Reno
Wichita State University
Northern Arizona University

Figure 4: Academic year tuition and required fees for full-time, first-time degree/certificate-seeking undergraduates: 2011-12 to 2014-15



Source: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS): Fall 2014, Institutional Characteristics component

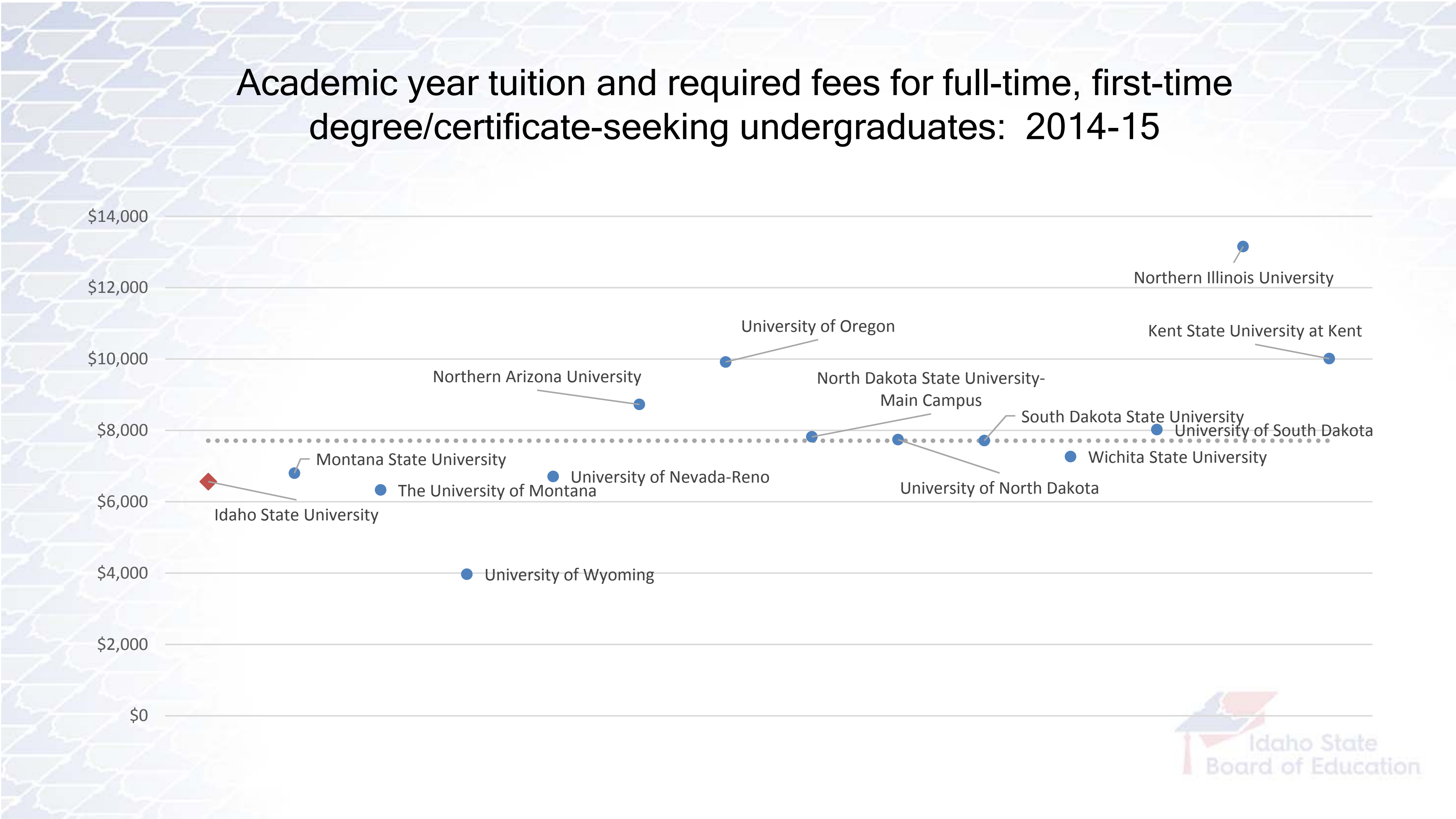
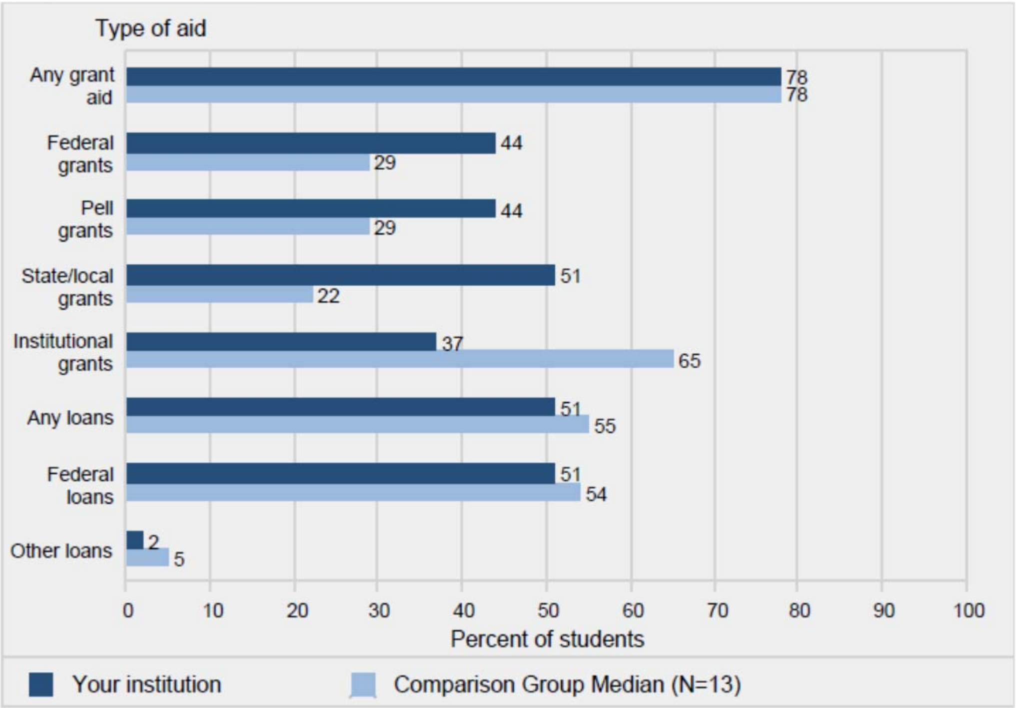

Academic year tuition and required fees for full-time, first-time degree/certificate-seeking undergraduates: 2014-15
$14,000
$12,000
$10,000
$8,000
$6,000
$4,000
$2,000
$0
Northern Illinois University
University of Oregon
Kent State University at Kent
Northern Arizona University
North Dakota State University-Main Campus
South Dakota State University
University of South Dakota
Wichita State University
Montana State University
University of Nevada-Reno
The University of Montana
University of North Dakota
Idaho State University
University of Wyoming
Idaho State Board of Education

Figure 6: Percent of full-time, first-time degree/certificate-seeking undergraduate students who received grant or scholarship aid from the federal government, state/local government, or the institution, or loans, by type of aid: 2013-2014



Source: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS): Winter 2014-15, Student Financial Aid Component

Idaho State Board of Education

Percent of full-time, first-time degree/certificate-seeking undergraduate students who received grant or scholarship aid from the federal government, state/local government, or the institution, or loans, by type of aid: 2013-2014

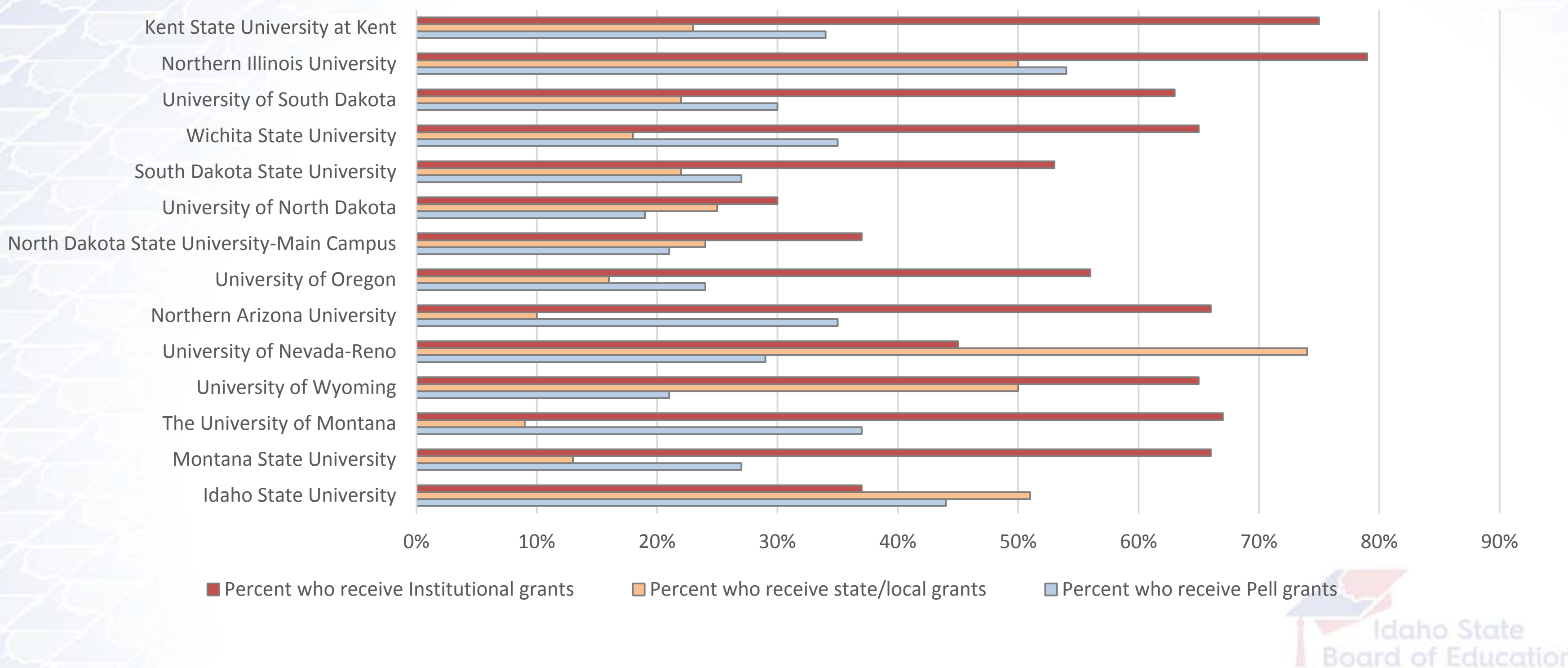
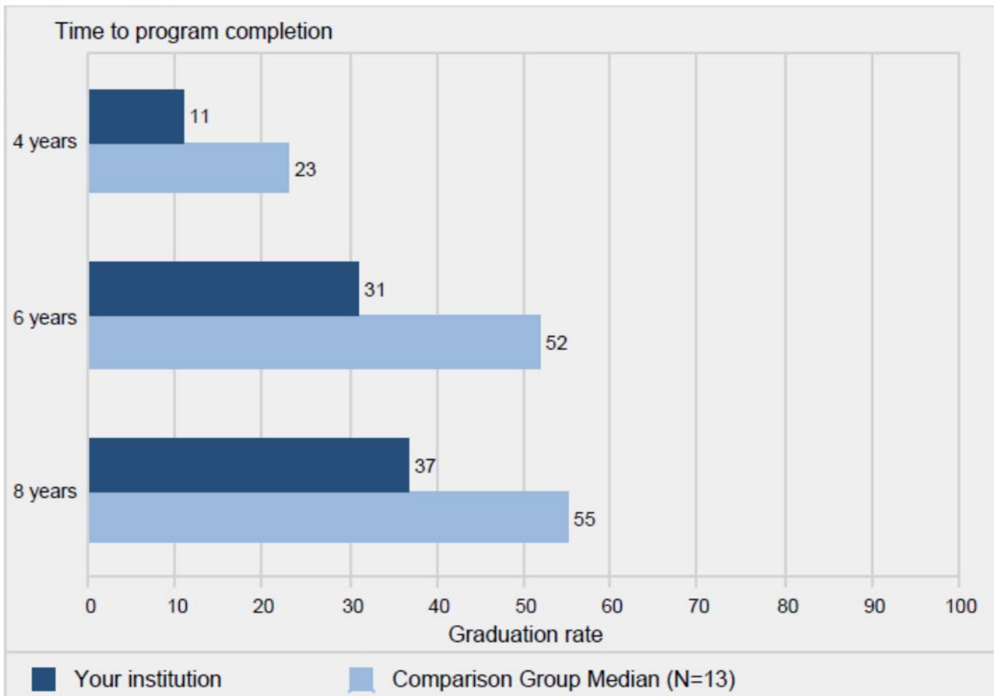


Figure 11: Bachelor's degree graduation rates of full-time, first-time degree/certificate-seeking undergraduates within 4 years, 6 years, and 8 years: 2006 cohort



Source: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS): Winter 2014-15, 200% Graduate Rates component

Bachelor's degree graduation rates of full-time, first-time degree/certificate-seeking undergraduates within 4 years, 6 years, and 8 years: 2006 cohort

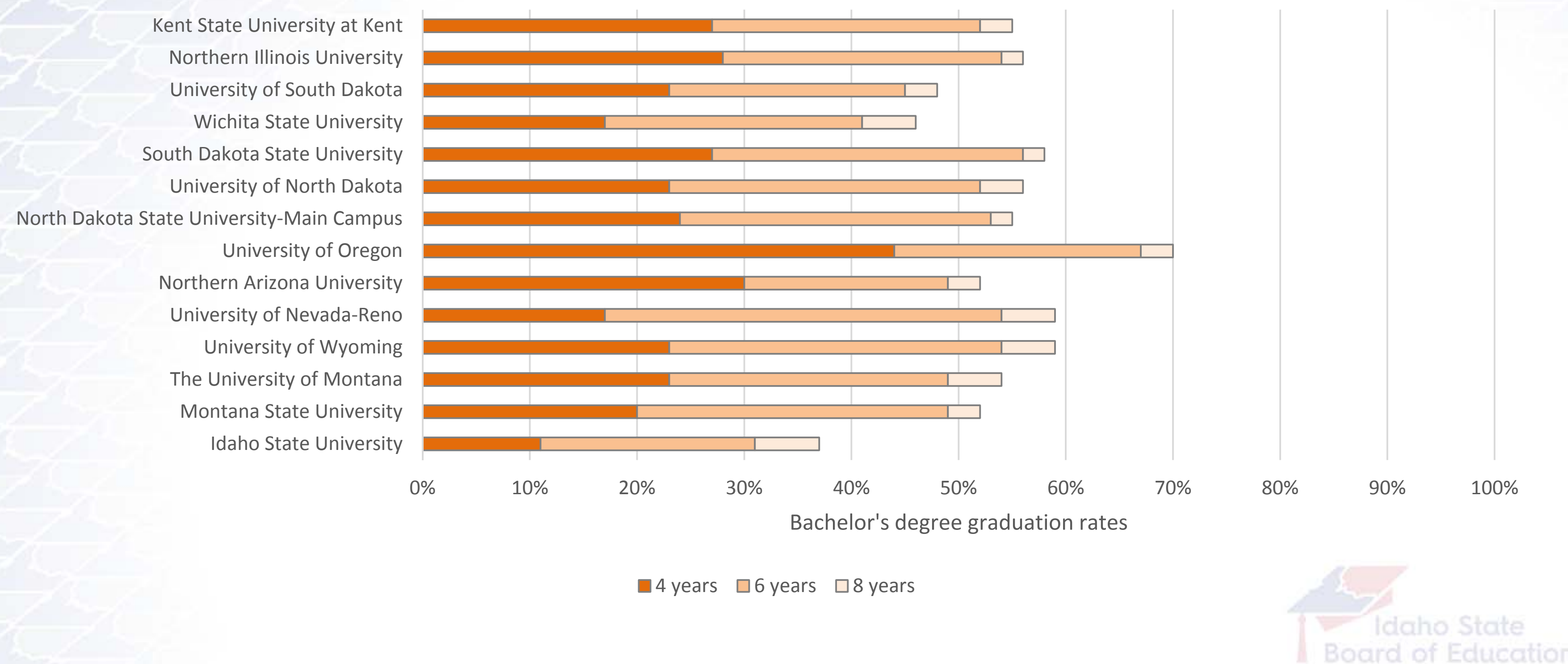
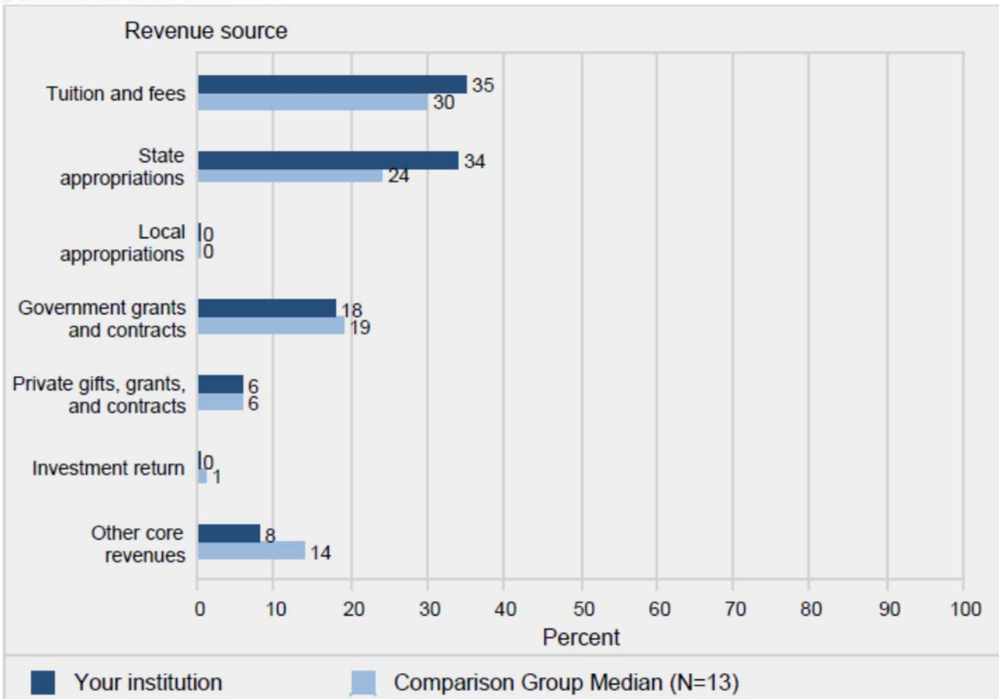


Figure 13: Percent distribution of core revenues, by source: Fiscal year 2014



Source: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS): Spring 2014, Finance component

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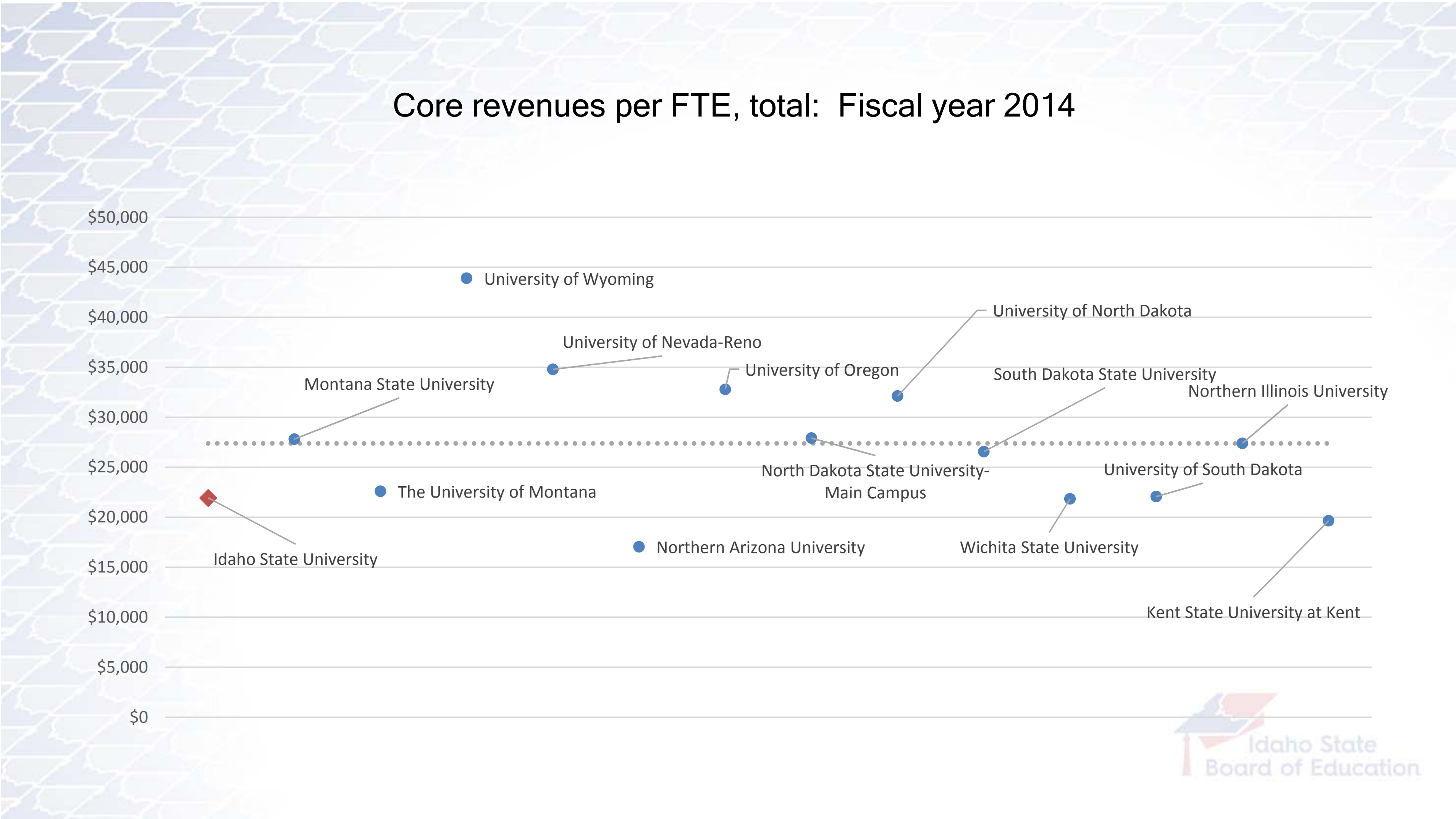
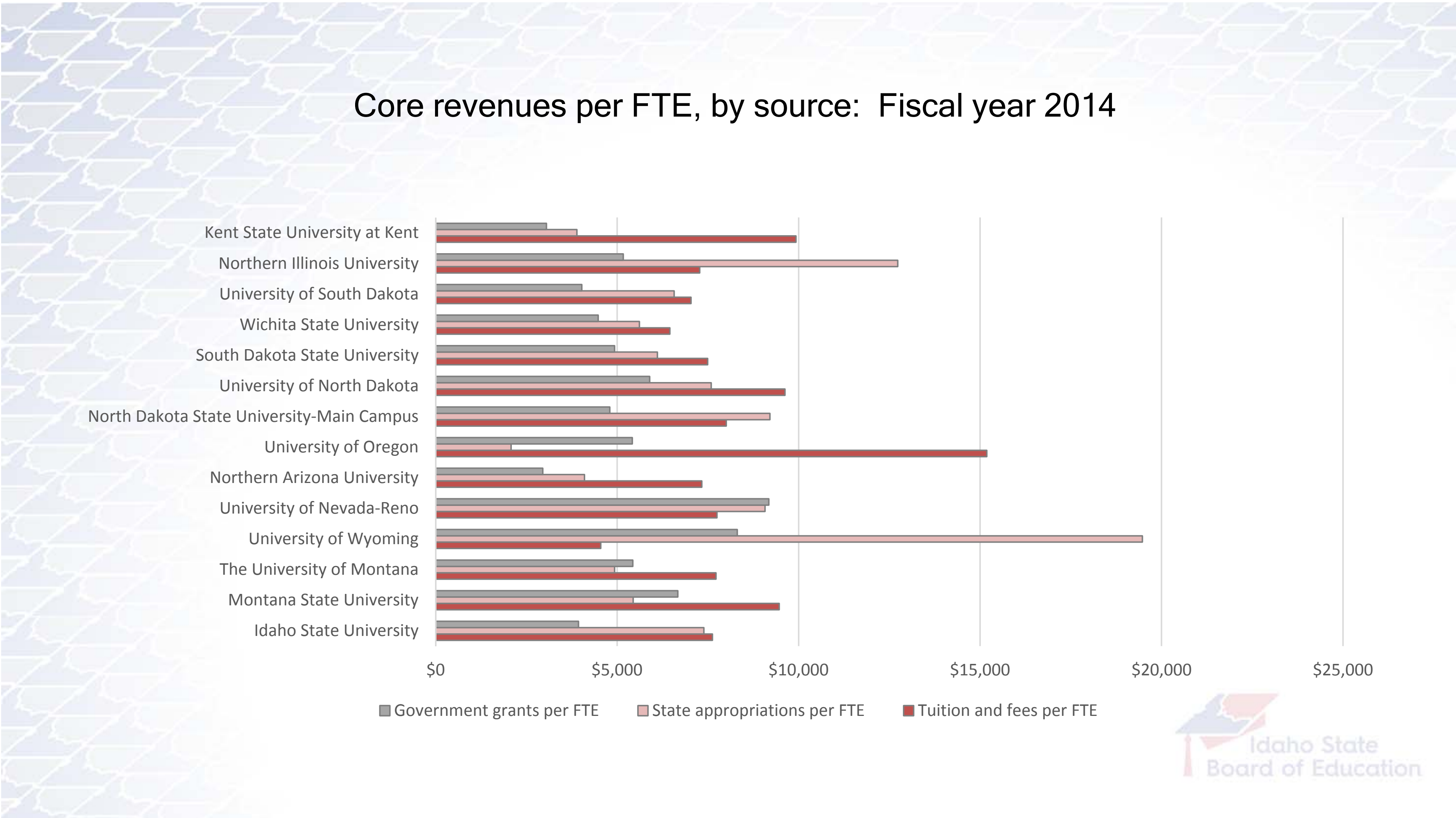
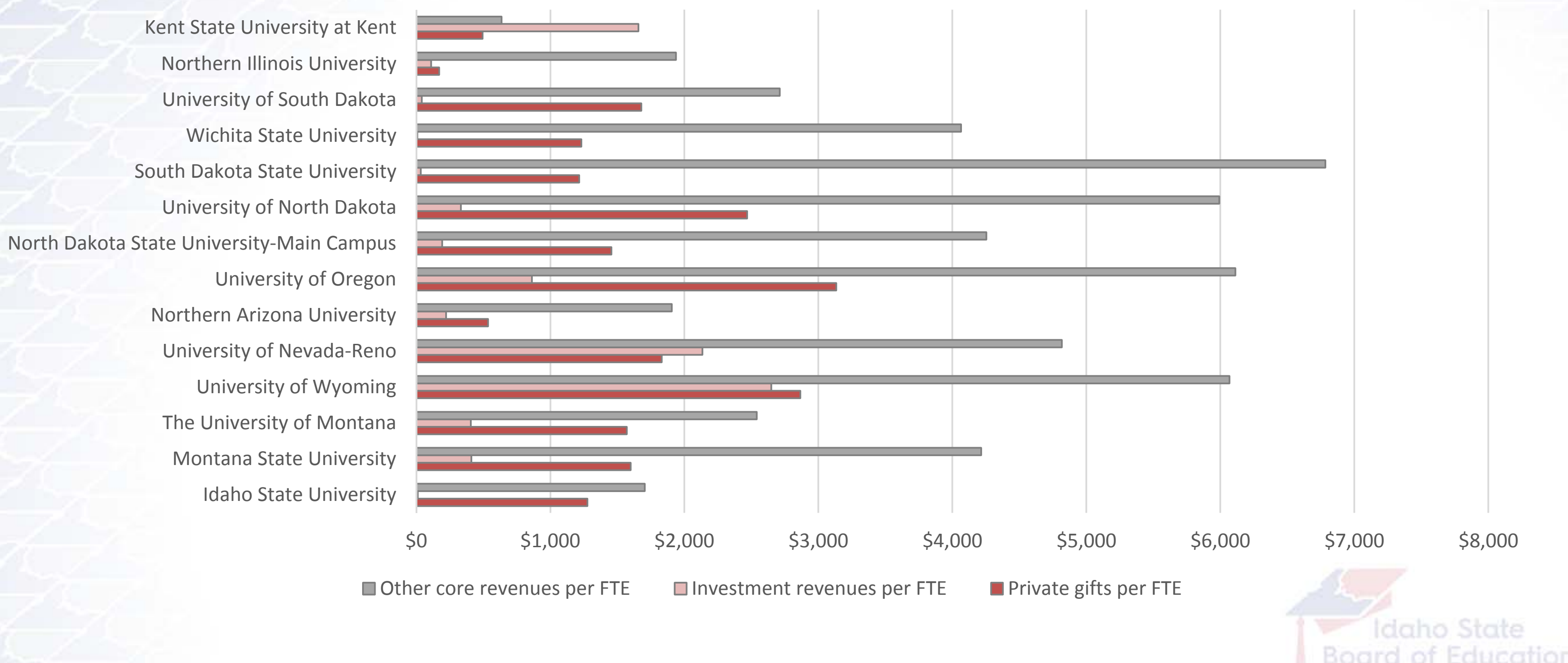
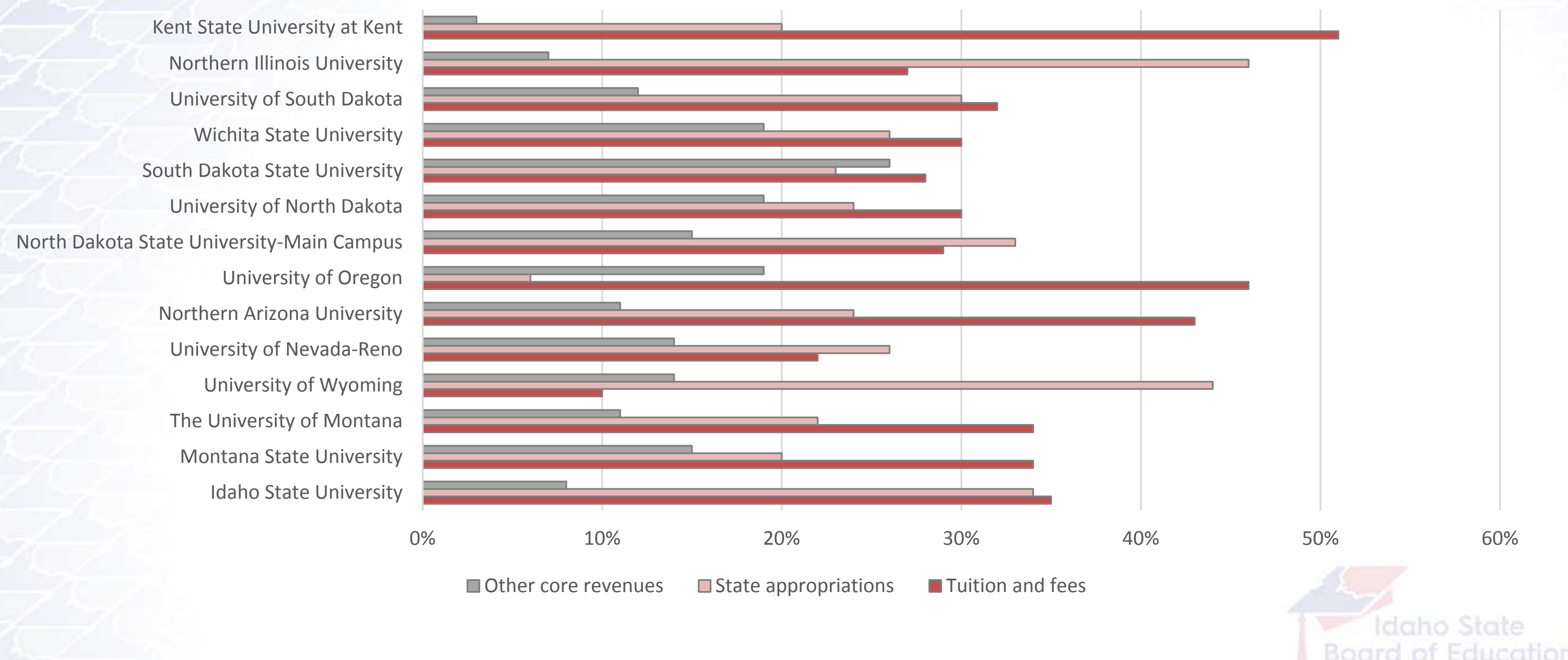

Core revenues per FTE, total: Fiscal year 2014
$50,000
$45,000
$40,000
$35,000
$30,000
$25,000
$20,000
$15,000
$10,000
$5,000
$0
University of Wyoming
University of North Dakota
University of Nevada-Reno
University of Oregon
South Dakota State University
Montana State University
Northern Illinois University
North Dakota State University-Main Campus
University of South Dakota
The University of Montana
Idaho State University
Northern Arizona University
Wichita State University
Kent State University at Kent
Idaho State Board of Education


Core revenues per FTE, by source: Fiscal year 2014
Kent State University at Kent
Northern Illinois University
University of South Dakota
Wichita State University
South Dakota State University
University of North Dakota
North Dakota State University-Main Campus
University of Oregon
Northern Arizona University
University of Nevada-Reno
University of Wyoming
The University of Montana
Montana State University
Idaho State University
$0
$5,000
$10,000
$15,000
$20,000
$25,000
Government grants per FTE
State appropriations per FTE
Tuition and fees per FTE
Idaho State Board of Education

Core revenues per FTE, by source: Fiscal year 2014



Percent distribution of core revenues, by source: Fiscal year 2014



Percent distribution of core revenues, by source: Fiscal year 2014

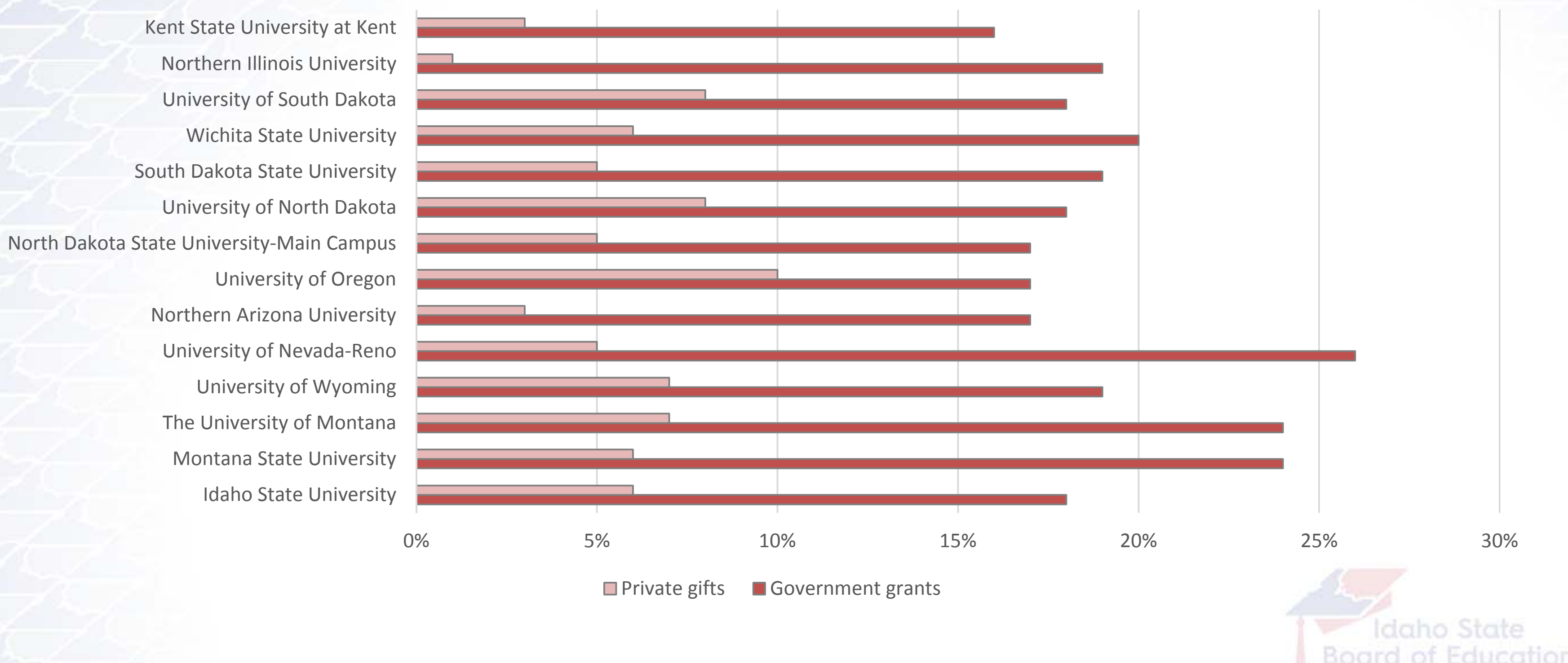
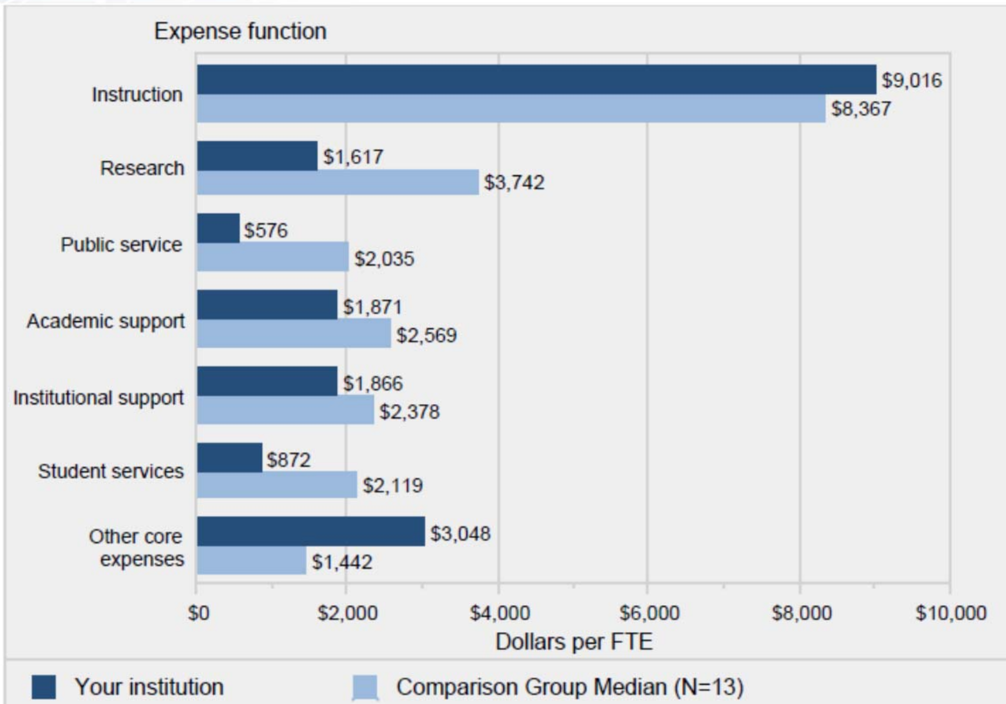
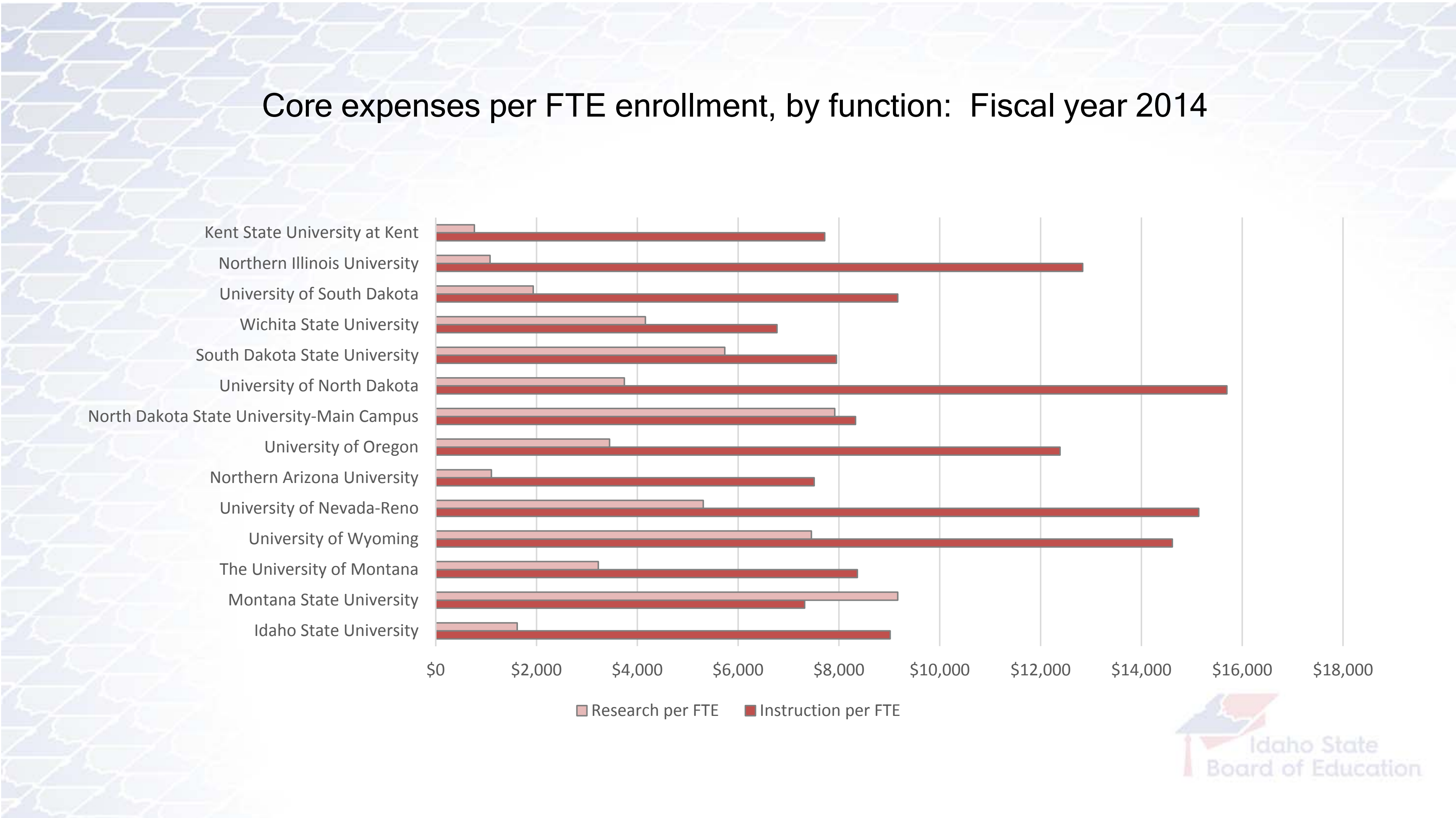


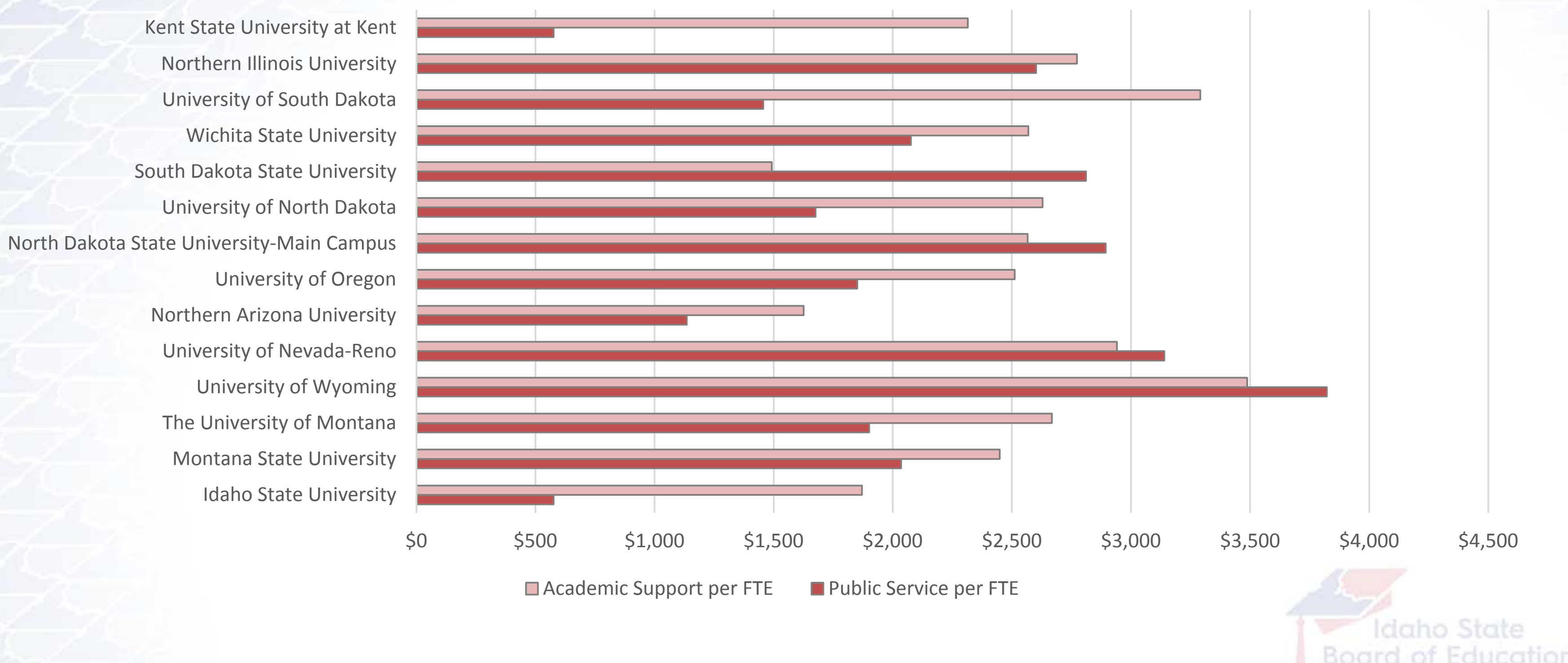
Figure 14: Core expenses per FTE enrollment, by function: Fiscal year 2014



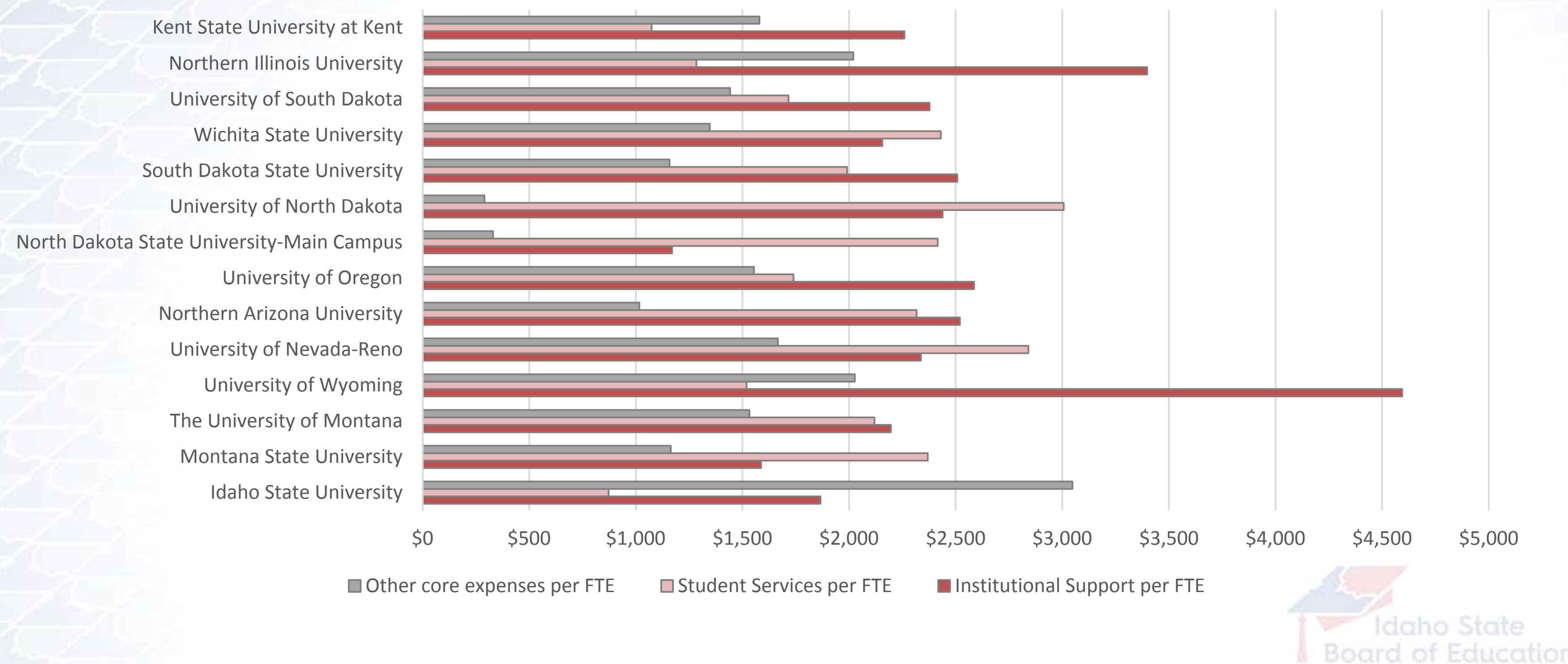
Source: U.S. Department of Education, National Center for Education Statistics, Integrated Postsecondary Education Data System (IPEDS): Fall 2014, 12-month Enrollment component and Spring 2015, Finance component


Core expenses per FTE enrollment, by function: Fiscal year 2014
Kent State University at Kent
Northern Illinois University
University of South Dakota
Wichita State University
South Dakota State University
University of North Dakota
North Dakota State University-Main Campus
University of Oregon
Northern Arizona University
University of Nevada-Reno
University of Wyoming
The University of Montana
Montana State University
Idaho State University
$0
$2,000
$4,000
$6,000
$8,000
$10,000
$12,000
$14,000
$16,000
$18,000
Research per FTE
Instruction per FTE
Idaho State
Board of Education

Core expenses per FTE enrollment, by function: Fiscal year 2014



Core expenses per FTE enrollment, by function: Fiscal year 2014

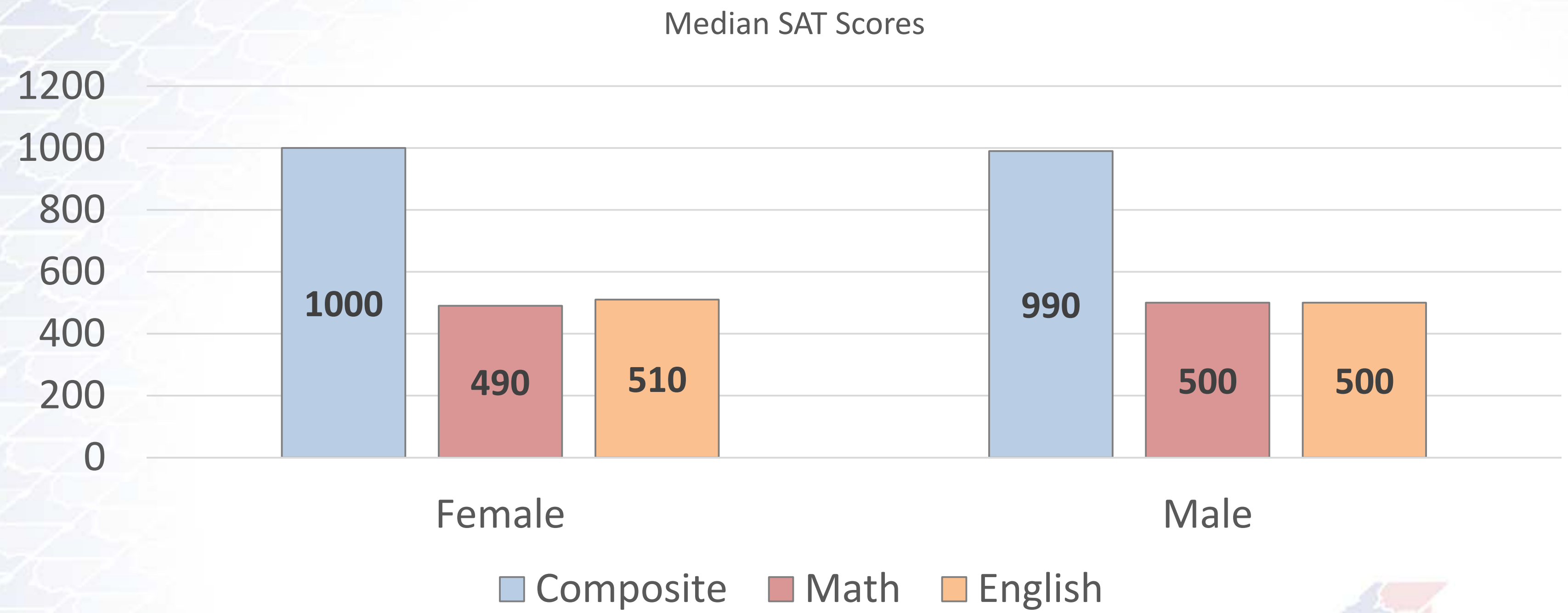


SAT Data Dashboard

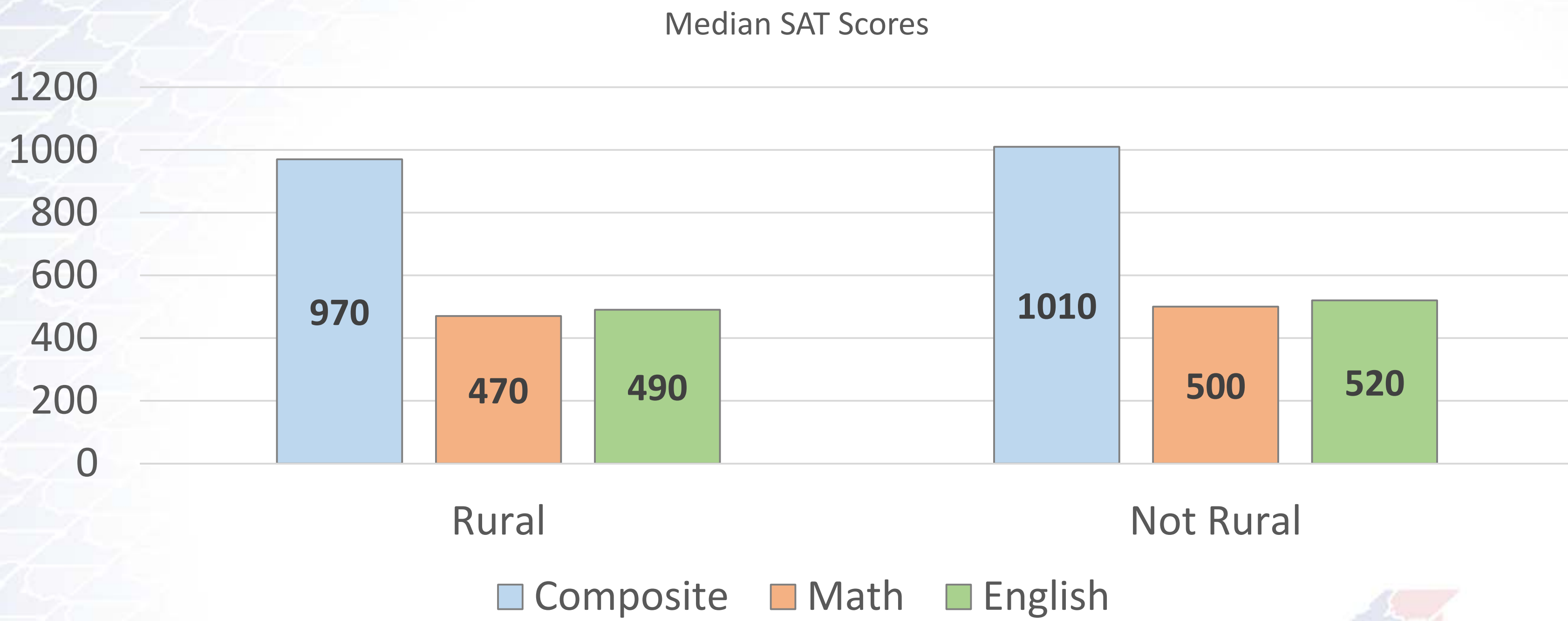
August 10, 2016

Idaho State
Board of Education

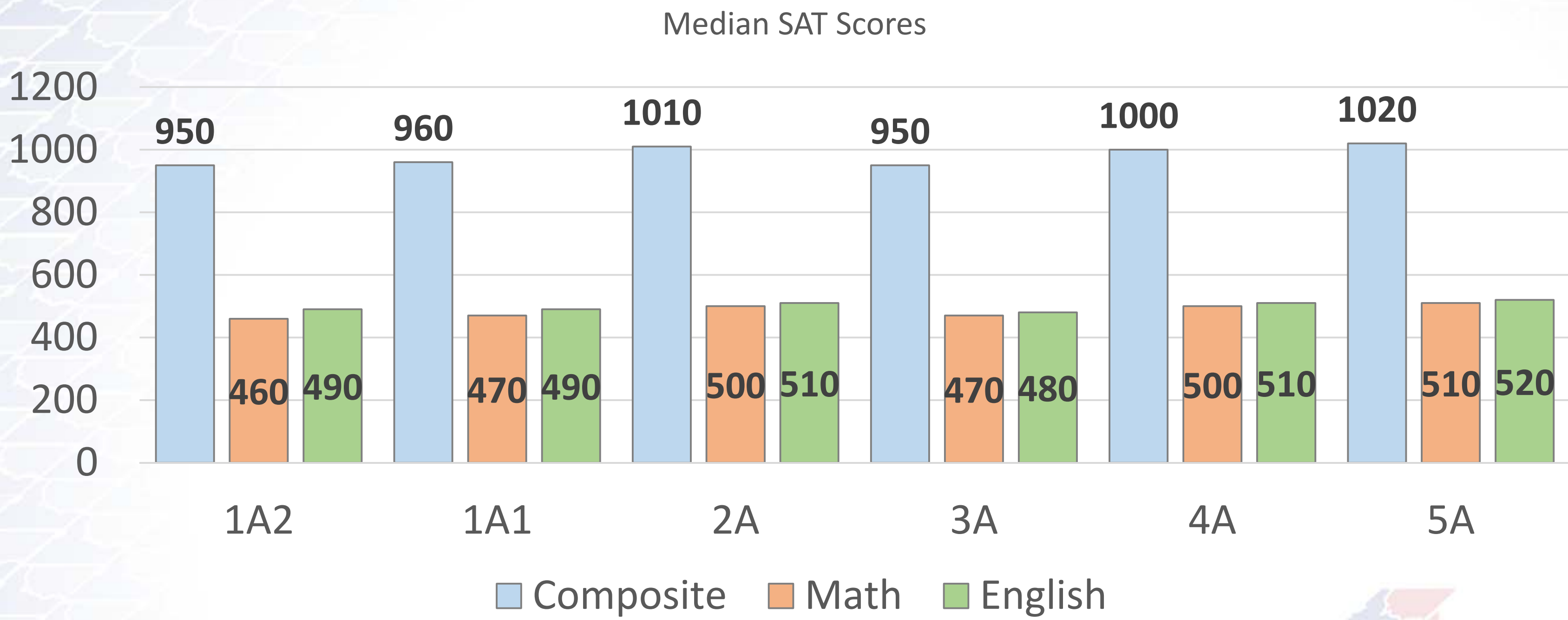
SAT results by gender



SAT scores by rural indicator

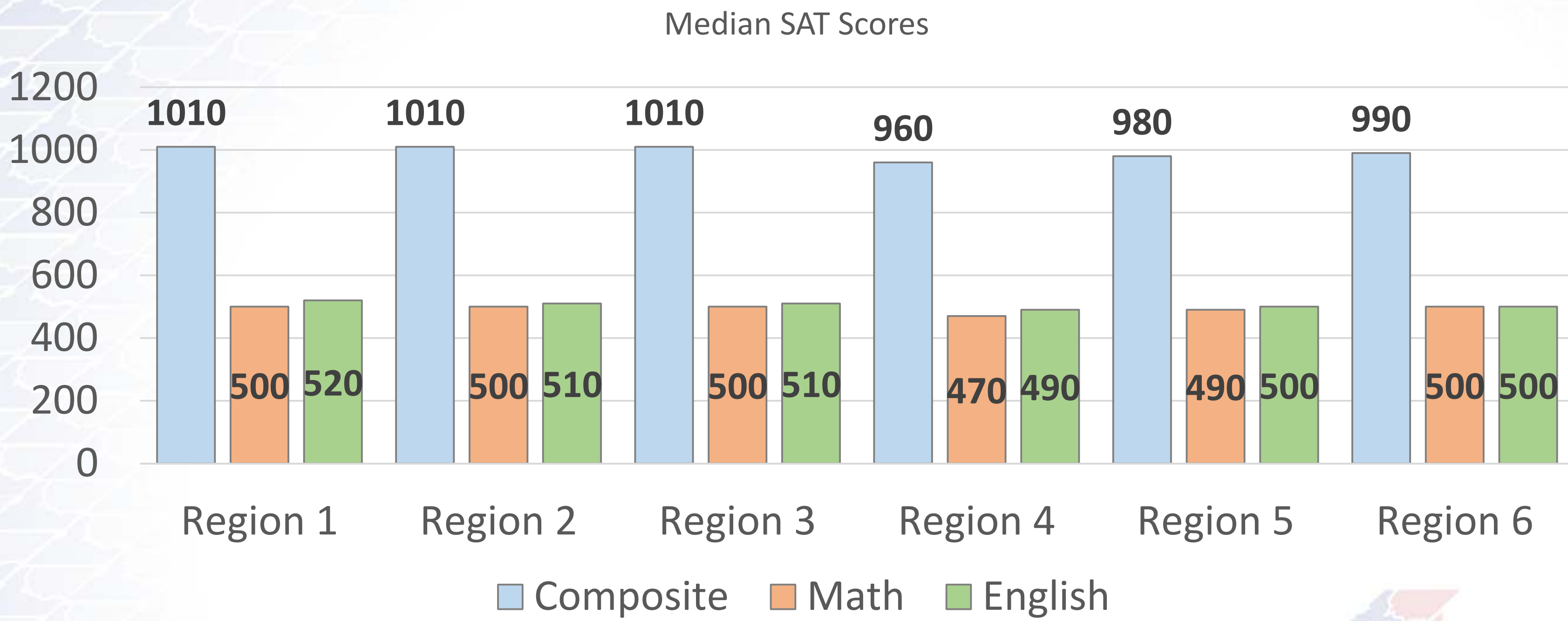


SAT score by athletic classification



Idaho State Board of Education

SAT scores by region



Idaho State Board of Education

Examples of Dashboards

August 10, 2016

Idaho State
Board of Education

Kentucky Center for Education & Workforce Statistics

- Highschool feedback reports

https://kcews.ky.gov/Reports/HSFeedback/HSFeedbackReports.aspx

- Teacher preparation feedback reports

https://kcews.ky.gov/Reports/TPFeedback/TeacherPrep.aspx

Florida College Access Network

Data and research – http://www.floridacollegeaccess.org/research-and-data/

Idaho State Board of Education

Colorado SchoolView

https://www.cde.state.co.us/schoolview

Idaho State
Board of Education

Texas Higher Education Data

http://www.txhighereddata.org/

Idaho State
Board of Education

SUBJECT

Five Year Plan for Higher Education

REFERENCE

December 2015	Board approved its 2016-2020 (FY17-FY21) Strategic Plan

APPLICABLE STATUTE, RULE, OR POLICY

Idaho State Board of Education Governing Policies & Procedures, Section I.M.1.
Idaho Code §67-1903

BACKGROUND/DISCUSSION

Earlier this summer the Governor asked the Board to develop a five year plan for higher education. The Board's Strategic Plan (Plan) is in fact a five year plan for public education (inclusive of secondary and postsecondary); but fulfilling the Governor's request will require the Board to identify specific activities by which to operationalize the Plan. To that end, Board staff have mapped the Plan's goals and objectives to Board activities and initiatives, and categorized them as: "Proposed", "In Progress", and "Operational." For example, outcomes-based funding is "Proposed," while Direct Admissions is "Operational."

IMPACT

The Governor has indicated he wants "to work with the Board and the Legislature to providing meaningful, long-term support for higher education." His support, however, is predicated on getting buy-in from "a broad base of people and organizations …. [for] all the components of the plan for higher education."

An Operational Plan would serve as an advocacy piece for the 2017 Legislation Session.

ATTACHMENTS

Attachment 1 – Operational Plan	Page 3

STAFF COMMENTS AND RECOMMENDATIONS

The Board will have the opportunity to discuss the discrete activities and initiatives identified in the Operational Plan, and provide feedback to staff for incorporation into the Operational Plan document.

In the interest of time, staff recommends the Board authorize staff to convene a group of stakeholders to review the Operational Plan (as amended if applicable) and provide recommendations back to the Board at its regular October meeting.

BOARD ACTION

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

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Idaho State Board of Education
650 W. State Street • Suite 307 • Boise, ID • 83702
P.O. Box 83720 • Boise, ID • 83720-0037

OPERATIONAL PLAN

Mapped to Board-approved Strategic Plan
(FY 2017-2021)

GOAL 1: A WELL EDUCATED CITIZENRY

Idaho's P-20 educational system will provide opportunities for individual advancement across Idaho's diverse population

Objective A: Access - Set policy and advocate for increasing access to Idaho's educational system for all Idahoans, regardless of socioeconomic status, age, or geographic location.

- Adult Degree Completion Scholarship — Status: Proposed
- College and Career Advising — Status: Implementation
- Eastern Idaho Community College — Status: Proposed
- Expanding Online program offerings — Status: Operational & Expanding
- Direct Admissions — Status: Operational
- Idaho Common College Application — Status: In Progress
- Open Education Resources (OER) — Status: Proposed
- Advanced Opportunities — Status: Operational & Expanding
- Next Steps website — Status: Operational & Expanding
- Opportunity Scholarship expansion — Status: Operational
- ISU Tuition Lock — Status: Operational
- Medical Education & Residency expansion — Status: Operational & Expanding

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

- Prior Learning Assessment — Status: Operational & Expanding
- English and Math Corequisite Remediation — Status: In Progress
- Adult Degree Completion Scholarship — Status: Proposed
- Articulation and Transfer (portal) — Status: In Progress
- Badges/SkillStack — Status: In Progress

Objective C: Higher Level of Educational Attainment – Increase successful progression through Idaho's educational system.

- College & Career Advising — Status: Implementation
- Outcomes-based Funding* — Status: Proposed
- Direct Admissions — Status: Operational
- Idaho Common College Application — Status: In Progress
- Advanced Opportunities — Status: Operational & Expanding
- GED Direct Admissions — Status: Proposed

Objective D: Quality Education – Deliver quality programs that foster the development of individuals who are entrepreneurial, broadminded, critical thinkers, and creative.

- Program Prioritization — Status: Operational
- Program Inventory Database — Status: In Progress
- Teacher Prep Programs Improvement — Status: In Progress
- Low performing schools — Status: In Progress

Objective E: Education to Workforce Alignment – Deliver relevant education that meets the needs of Idaho and the region.

- EASI K-20/Workforce WICHE data — Status: Operational & Expanding
- Badges/SkillStack — Status: In Progress

GOAL 2: Innovation and Economic Development

The educational system will provide an environment that facilitates the creation of practical and theoretical knowledge leading to new ideas.

Objective A: Workforce Readiness – Prepare students to efficiently and effectively enter and succeed in the workforce.

- Work Scholars (LCSC), Career Path Internship (ISU) — Status: Operational
- Computer Science Co-Op Program — Status: Proposed
- CTE program horizontal and vertical alignment — Status: In Progress
- Career Atlas — Status: In Progress
- Badges/SkillStack — Status: In Progress

Objective B: Innovation and Creativity – Increase creation and development of new ideas and solutions that benefit society.

- INL-BSU Cybersecurity Lab — Status: In Progress
- INL development project — Status: Proposed
- HERC programs — Status: Operational
- Educational Analytics System of Idaho (EASI) Portal — Status: Proposed

Objective C: Economic Growth – *New objective currently under development*.

- Higher Ed impact on employability and lifetime earning potential?

GOAL 3: Effective and Efficient Educational System – Ensure educational resources are coordinated throughout the state and used effectively.

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

- Educational Analytics System of Idaho (EASI) Status: Operational & Expanding

Objective B: Quality Teaching Workforce – Develop, recruit and retain a diverse and highly qualified workforce of teachers, faculty, and staff.

- Career Ladder Performance Evaluation audits Status: In Progress
- Charter performance certificates Status: Operational
- Teacher Prep Programs Improvement Status: In Progress
- Identifying Low Performing Programs Status: In Progress
- Educational Analytics System of Idaho (EASI) Status: Operational & Expanding

Objective C: Alignment and Coordination – Facilitate and promote the articulation and transfer of students throughout the education pipeline (Secondary School, Technical Training, 2yr, 4yr, etc.)

- Prior Learning Assessment Status: In Progress
- CTE horizontal & vertical alignment Status: In Progress
- 2+2 Programs (AA to BA) Status: Operational & Expanding
- Articulation and Transfer (portal) Status: In Progress
- Common Course numbering Status: Proposed
- English and Math Corequisite Remediation Status: In Progress

Objective D: Productivity and Efficiency – Apply the principles of program prioritization for resource allocation and reallocation.

- Program Prioritization Status: Operational
- Outcomes-based Funding* Status: Proposed
- Graduate programs audits Status: Operational

Objective E: Advocacy and Communication – Educate the public and their elected representatives by advocating the value and impact of the educational system.

- Direct Admissions media campaign Status: In Progress
- Nextsteps.idaho.gov Status: Operational & Expanding
- Regional Superintendents meetings (1-2x/yr) Status: Operational
- Legislative advocacy Status: Operational
- Stakeholder (IASA/ISBA/IEA) meetings (monthly) Status: Operational
- Social media Status: Operational
- Tableau/Dashboards Status: Operational & Expanding

* Includes colleges, universities and CTE

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UNIVERSITY OF IDAHO

SUBJECT

Approval of amended terms for Operating Agreement with the University of Idaho Foundation.

REFERENCE

October 2008	Idaho State Board of Education (Board) consideration and approval of Foundation agreements for Boise State University, Idaho State University and the University of Idaho.
August 2009	Board consideration and approval of amended Operating Agreement with University of Idaho Foundation.
June 2016	Audit Committee reviewed proposed amendment to Operating agreement and agreed to forward document to Board with recommendation to approve.

APPLICABLE STATUTE, RULE, OR POLICY

Idaho State Board of Education Governing Policies & Procedures, Section V.E. Gifts and Affiliated Foundations

BACKGROUND/DISCUSSION

The University of Idaho (UI) and the University of Idaho Foundation (Foundation) have been successfully operating under the Operating Agreement approved by the State Board of Education (Board) in August 2009, and effective as of August 31, 2009. At this time the Operating Agreement is before the Board for periodic review and approval in accordance with Board Policy V.E.2.c. The parties have taken this opportunity to update the Operating Agreement with minor revisions, described below. In addition, the Exhibits have all been updated to include the most recent version of the original Exhibit.

Document Revisions

a. Article VIII.E. regarding Board review of the Agreement is modified to provide that Board review will be as required by Board policy or as requested by the Board. This will allow for continued consistency between the Agreement and Board policy. The current policy states that the Agreement will be submitted to the Board for review and approval every three (3) years, or as otherwise requested by the Board.

b. The First Addendum to Operating Agreement between UI and the Foundation, entered into on August 31, 2009 is eliminated. This addendum addressed transition and timing issues related to transferring functions from UI to the Foundation in compliance with the Agreement. The transition is now complete making the First Addendum moot.

IMPACT

As anticipated in 2009, the parties have worked diligently to move functions from the UI to the Foundation. The parties now have split cash management functions, and currently the Foundation has eleven loaned employees who perform the functions transferred from UI to the Foundation.

UI does not anticipate a material financial impact on the UI or the Foundation. The proposed changes to the Agreement are minor and represent the continuation of current operations within current budgets.

UI will continue to monitor the efficacy of the operational structure and consider potential changes based on their experience. Any material changes will be presented to the Regents prior to implementation.

ATTACHMENTS

STAFF COMMENTS AND RECOMMENDATIONS

The proposed amendments to the Operating Agreement bring the document into alignment with current Board policy. There are no significant changes to the agreement terms previously approved by the Board during its 2009 review. The Audit Committee has reviewed the proposed amendments and has forwarded the agreement to the Board with a recommendation for approval. Staff recommends approval.

BOARD ACTION

I move to approve the agreement between the University of Idaho and the University of Idaho Foundation, as submitted in Attachment 2.

Moved by __________ Seconded by __________ Carried Yes _____ No _____

OPERATING AGREEMENT
THE UNIVERSITY OF IDAHO AND
THE UNIVERSITY OF IDAHO FOUNDATION, INC.

This agreement ("Operating Agreement") is entered into effective the ___ day of ____________ ~~2009~~ 2016 by and between the University of Idaho ("University") and the University of Idaho Foundation, Inc. ("Foundation"), as amended, it is a continuation and restatement of the Operating Agreement entered into on August 31, 2009, which it fully replaces. The University and the Foundation are sometimes collectively referred to herein separately as a "Party" and collectively as the "Parties."

WHEREAS, the Foundation is a nonprofit corporation incorporated on September 23, 1970, pursuant to the Idaho Nonprofit Corporation Act;

WHEREAS, the Foundation has been recognized as a tax-exempt entity under Section 501(c)(3) of the Internal Revenue Code;

WHEREAS, the Foundation's mission includes the management and distribution of private support to enhance the growth and development of the University;

WHEREAS, the Foundation and the University desire to set forth in writing various aspects of their relationship with respect to matters such as the solicitation, receipt, management, transfer and expenditure of funds;

WHEREAS, the Idaho State Board of Education and the Board of Regents of the University of Idaho (collectively the "State Board") have promulgated Policies and Procedures to be effective as of July of 2008 ("State Board's Policies and Procedures") which are attached hereto as Exhibit "A";

WHEREAS, Section V.E.2.c. of the State Board's Policies and Procedures requires the University to enter into a written operating agreement with the Foundation that sets forth their operating relationship; and

WHEREAS, the Foundation and the University intend for this agreement to be the written operating agreement required by Section V.E.2.c. of the State Board's Policies and Procedures.

NOW THEREFORE, in consideration of the mutual covenants and undertakings herein, the University and the Foundation hereby agree as follows:

ARTICLE I

FOUNDATION'S PURPOSES

The Foundation is the primary affiliated foundation responsible for assisting the University in soliciting, managing and distributing private support for the University. Accordingly, to the extent consistent with the Foundation's Articles of Incorporation and By-Laws, and the State Board's Policies and Procedures, the Foundation shall: (1) assist in the solicitation of, receive and accept gifts, devises, bequests and other direct or indirect contributions of money and other property made for the benefit of the University from the general public (including individuals, corporations, other entities and other sources); (2) manage and invest the money and property it receives for the benefit of the University; and (3) support and assist the University in fundraising and donor relations.

In carrying out its purposes the Foundation shall not engage in activities that conflict with (1) federal or state laws, rules and regulations (including, but not limited to all applicable provisions of the Internal Revenue Code and corresponding Federal Treasury Regulations); (2) applicable polices of the State Board; or (3) the role and mission of the University.

ARTICLE II

FOUNDATION'S ORGANIZATIONAL DOCUMENTS

The Foundation shall provide copies of its current Articles of Incorporation and Bylaws to the University. All amendments of such documents shall also be provided to the University. Furthermore, the Foundation shall, to the extent practicable, provide the University with an advance copy of any proposed amendments to the Foundation's Articles of Incorporation and Bylaws.

ARTICLE III

UNIVERSITY RESOURCES AND SERVICES

A. *University Employees*.

1. *Liaison*: The University's Vice President for University Advancement shall serve as the University's liaison to the Foundation (the "Liaison"). The duties and responsibilities of the Liaison are as follows:

a. The Liaison shall be responsible for communicating with the Foundation regarding the University's fundraising efforts and for coordinating any administrative support provided by the University to the Foundation.

b. The Liaison or the Liaison's designee shall attend each meeting of the Foundation's Board of Directors and shall report on behalf of the University to the Foundation's Board of Directors regarding the University's fundraising efforts. The Liaison may also report other information to the Foundation's Board of Directors that is pertinent to the common goals of the University and the Foundation.

2. *Executive Director*: The Executive Director of the Foundation is an employee of the University who is loaned to the Foundation. All of the Executive Director's services shall be provided directly to the Foundation as follows:

a. The Executive Director shall be responsible for the supervision and control of the day-to-day operations of the Foundation. More specific duties of the Executive Director may be set forth in a written job description prepared by the Foundation and attached to the Loaned Employee Agreement described in subparagraph c below. The Executive Director shall be subject to the control and direction of the Foundation.

b. The Executive Director shall be an employee of the University and entitled to University benefits to the same extent and on the same terms as other full-time University employees of the same classification as the Executive Director. The Foundation shall reimburse the University for all costs incurred by the University in connection with the University's employment of the Executive Director including such expenses as salary, payroll taxes, and benefits.

c. The Foundation and the University shall enter into a written agreement, substantially in the form of Exhibit "B" hereto, establishing that the Executive Director is an employee of the University but subject to the direction and control of the Foundation (generally a "Loaned Employee Agreement"). The Loaned Employee Agreement shall also set forth the relative rights and responsibilities of the Foundation and the University with respect to the Executive Director.

d. In the event the Executive Director resigns, is terminated according to the terms of the Loaned Employee Agreement, or otherwise leaves the employ of the University, hiring of the subsequent Executive Director shall be done in accordance with Foundation procedures, University procedures (including University equal employment procedures), and applicable law (including laws applicable to the University). The Foundation shall have the ability to terminate the Loaned Employee Agreement upon notice to the University as further set forth in the Loaned Employee Agreement. The Foundation must provide the University with prior approval to hire any employee that the Foundation and University intend to be a loaned employee before the University employs such individual.

e. The University and the Foundation may elect to enter into additional agreements for the loaning of additional employees to the Foundation by the University pursuant to terms substantially similar to the Loaned Employee Agreement attached as Exhibit “B.” The additional loaned employees shall report to either the Foundation Board or the Executive Director of the Foundation, in either case as determined by the Foundation Board and as specified in the additional loaned employee agreements. Such loaned employees shall have no function at the University other than to act in their capacity as employees loaned to the Foundation.

f. Termination of the Executive Director in accordance with the Loaned Employee Agreement shall constitute grounds for a termination proceeding by the University or for non-renewal of the Executive Director's contract with the University, if any.

3. *Limited Authority of University Employees*. Notwithstanding the foregoing provisions, no University employee other than an employee loaned to the Foundation shall be permitted to have responsibility or authority for Foundation policy making, financial oversight, spending authority, investment decisions, or the supervision of Foundation employees.

B. *Support Staff Services*. The University shall provide administrative support in financial, accounting, investment and development services to the Foundation, as set forth in the Service Agreement attached hereto as Exhibit "C" ("Service Agreement"). Except as specifically provided otherwise herein, all University employees who provide support services to the Foundation shall remain University employees under the direction and control of the University, unless it is agreed that the direction and control of any such employee will be vested with the Foundation in a Loaned Employee Agreement. The Foundation will pay directly to the University the portion of the overhead costs associated with the services provided to the Foundation pursuant to the Service Agreement or as otherwise determined by the agreement of the Parties.

C. *University Facilities and Equipment*. The University shall provide the use of the University's office space, equipment and associated services to the Foundation's employees upon the terms agreed to by the University and the Foundation. The terms of use (including amount of rent) of the University's office space, equipment and associated services shall be as set forth in the Service Agreement.

D. *No Foundation Payments to University Employees*. Notwithstanding any contrary provision of this Agreement to the contrary, the Foundation shall not make any payments directly to a University employee in connection with any resources or services provided to the Foundation pursuant to this Article.

ARTICLE IV

MANAGEMENT AND OPERATION OF FOUNDATION

A. *Gift Solicitation*.

1. *Form of Solicitation*. Any and all Foundation gift solicitations shall make clear to prospective donors that (1) the Foundation is a separate legal and tax entity organized for the purpose of encouraging voluntary, private gifts, trusts, and bequests for the benefit of the University; and (2) responsibility for the governance of the Foundation, including the investment of gifts and endowments, resides in the Foundation's Board of Directors.

2. *Foundation is Primary Donee*. Absent unique circumstances, prospective donors shall be requested to make gifts directly to the Foundation rather than to the University.

B. *Acceptance of Gifts*.

1. *Approval Required Before Acceptance of Certain Gifts*. Before accepting contributions or grants for restricted or designated purposes that may require administration or direct expenditure by the University, the Foundation shall obtain the prior written approval of the University. Similarly, the Foundation shall also obtain the University's prior written approval of the acceptance of any gift or grant that would impose a binding financial or contractual obligation on the University. Prior to any approval by the University, the University shall obtain approval of the State Board where State Board policy requires such approval.

2. *Acceptance of Gifts of Real Property*. The Foundation shall conduct due diligence on all gifts of real property that it receives. All gifts of real property that are intended solely by the donor to be developed for the University's use or to otherwise house facilities of any kind for the University's use shall be approved by the State Board before such gifts are accepted by either the University or the Foundation. The University shall be responsible for obtaining this approval by the State Board. In cases where the real property is intended to be used by the University in connection with carrying out its proper functions, the real property may be conveyed directly to the University, in which case the University and not the Foundation shall be responsible for the due diligence obligations for such property.

3. *Processing of Accepted Gifts*. All gifts received by the University or the Foundation shall be delivered (if cash) or reported (if any other type of property) to the Foundation's designated Gift Administration Office (a unit of the University's Trust and Investment Office) in accordance with the Service Agreement.

C. *Fund Transfers*. The Foundation agrees to transfer funds, both current gifts and income from endowments, to the University on a regular basis as agreed to by the Parties. The Foundation's Treasurer or other individual to whom such authority has been delegated by the Foundation's Board of Directors shall be responsible for transferring funds as authorized by the Foundation's Board of Directors. All transfers and expenditures noted in this Section must comply with Section 501(c)(3) of the Internal Revenue Code and be consistent with the Foundation's sole mission to support the University.

1. *Restricted Gift Transfers*. The Foundation may transfer restricted gifts to the University. Any such transferred restricted gifts will only be expended by the University pursuant to the terms of such restrictions. The Foundation shall inform the University officials into whose program or department restricted gifts are transferred of all restrictions on the use of such gifts and provide such officials with access to any relevant documentation concerning such restrictions. Such University officials shall account for such restricted gifts separate from other program and department funds in accordance with applicable University policies and shall notify the Foundation on a timely basis regarding the uses of such restricted gifts.

2. *Unrestricted Gift Transfers*. The Foundation may utilize any unrestricted gifts it receives for any use consistent with the Foundation's purposes as generally summarized in

Article I of this Operating Agreement. The Foundation may make unrestricted donations to the University. Such donated funds will be expended under the oversight of the University President in compliance with state law and University policies. If the Foundation elects to use unrestricted gifts to make grants to the University, such grants shall be made at such times and in such amounts as the Foundation's Board of Directors may determine in such Board's sole discretion.

D. *Foundation Expenditures and Financial Transactions*.

1. *Signature Authority*. The Foundation designates the Foundation Chairman and Treasurer as the individuals with signature authority for the Foundation in all financial transactions. The Foundation's Treasurer may also delegate signature authority on a temporary basis consistent with the Foundation's Bylaws to another Foundation employee, an employee loaned to the Foundation, or a Foundation Board member who is not a University employee. In no event may the person with Foundation signature authority for financial transactions be a University employee, unless such individual is an employee who is loaned to the Foundation.

2. *Expenditures*. All expenditures of the Foundation shall be (1) consistent with the purposes of the Foundation, and (2) not violate restrictions imposed by the donor or the Foundation as to the use or purpose of the specific funds.

E. *University Report on Distributed Funds*. On a regular basis, which shall not be less than annually, the University shall report to the Foundation on the use of restricted and unrestricted funds transferred to the University. This report shall specify the restrictions on any restricted funds and the uses of such funds.

F. *Transfer of University Assets to the Foundation*. No University funds, assets, or liabilities may be transferred directly or indirectly to the Foundation without the prior approval of the State Board except when:

1. A donor inadvertently directs a contribution to the University that is intended for the Foundation in which case such funds may be transferred to the Foundation so long as the documents associated with the gift indicate the Foundation was the intended recipient of the gift. In the absence of any such indication of donor intent, such gift shall be deposited in a University account and, except for transfers described in subsections 2 and 4 of this Section, State Board approval will be required prior to the University's transfer of such funds to the Foundation.

2. The University has gift funds that were originally transferred to the University from the Foundation and the University wishes to return a portion of those funds to the Foundation for reinvestment consistent with the original intent of the gift.

3. The University has raised scholarship funds through a University activity and the University wishes to deposit the funds with the Foundation for investment and distribution consistent with the scholarship purposes for which the funds were raised.

4. The University transfers to the Foundation any gift received by the University from a donor that meets the following criteria: (i) the gift is less than $10,000, and (ii) the gift will be invested by the Foundation for scholarship or other general University support purposes. This subsection, however, shall not apply to payments by the University to the Foundation for University obligations to the Foundation, operating expenses of the Foundation or other costs of the Foundation.

G. *Separation of Funds*. All Foundation assets (including bank and investment accounts) shall be held in separate accounts in the name of the Foundation using the Foundation's Federal Employer Identification Number. The financial records of the Foundation shall be kept using a separate chart of accounts and shall be kept in a secured database that is protected by separate password-only access. For convenience, however, some Foundation expenses may be paid through the University such as payroll and campus charges. These expenses will be paid through accounts clearly titled as belonging to the Foundation and shall be reimbursed by the Foundation on a regular basis.

H. *Insurance*. To the extent that the Foundation is not covered by the State of Idaho Retained Risk Program, the Foundation shall maintain insurance to cover the operations and activities of its directors, officers and employees. The Foundation shall also maintain general liability coverage.

I. *Investment Policies*. All funds held by the Foundation, except those intended for short term expenditures, shall be invested in accordance with the Uniform Prudent Management of Institutional Funds Act, Idaho Code Sections 33-5001 to 33-5010, and the Foundation's investment policy which is attached hereto as Exhibit "D"; provided, however, the Foundation shall not invest any funds in a manner that would violate the applicable terms of any restricted gifts. The Foundation shall provide to the University any updates to such investment policy which updates shall also be attached hereto as Exhibit "D".

J. *Organization Structure of the Foundation*. The organizational structure of the Foundation is set forth in the Foundation's Articles of Incorporation which are attached hereto as Exhibit "E" and the Foundation's By-Laws dated January 30, 2009, which are attached at Exhibit "F." The Foundation agrees to provide copies of such Articles and By-Laws as well as any subsequent amendments to such documents to the University. Any such amendments to the Articles and By-Laws shall be attached hereto as additions to Exhibit "E" and Exhibit "F", respectively.

K. *Conflicts of Interest*. The Foundation has adopted a written policy addressing the manner the Foundation will address conflict of interest situations. The Foundation's Conflict of Interest Policy is attached hereto as Exhibit "G."

ARTICLE V

FOUNDATION RELATIONSHIPS WITH THE UNIVERSITY

A. *Access to Records*. The University shall have reasonable access to the financial records of the Foundation upon permission granted by the Foundation from time to time, which shall not be unreasonably withheld. All access by the University of such records shall be made in accordance with applicable laws, Foundation policies, and guidelines. In addition, upon request of the Foundation, the University shall execute a proprietary and confidentiality agreement and instruct its agents and employees that all confidential information of the Foundation shall be protected from disclosure. Except as specifically authorized under this agreement or the applicable proprietary and confidentiality agreement between the University and the Foundation, the University's access shall not include donor specific data of the Foundation such that would provide individually identifiable information about donors or their donations made to the Foundation.

B. *Records Management*.

1. The University acknowledges that in most cases the University is the primary recipient and depository of confidential donor information. The Parties recognize, however, that the records of the Foundation relating to actual or potential donors contain confidential information. Such records shall be kept by the Foundation in such a manner as to protect donor confidentiality to the fullest extent allowed by law. Notwithstanding the access to records permitted above, access to such confidential information by the University shall be limited to the University's President and any designee of the University's President. The donor database and all other data, materials and information of the Foundation and the University pertaining to past, current or prospective donors, are proprietary to the Foundation and the University respectively and constitute confidential information and trade secrets. The Foundation and University shall take the steps necessary to monitor and control access to the donor database and to protect the security of computer servers and software relevant to the database, in each case to the extent that these systems are in their respective control.

2. The Foundation shall be responsible for maintaining all permanent records of the Foundation including but not limited to the Foundation's Articles, By-Laws and other governing documents, all necessary documents for compliance with IRS regulations, all gift instruments, and all other Foundation records as required by applicable laws.

3. The Foundation’s Board of Directors shall foster an atmosphere of openness in its operations, consistent with the prudent conduct of its business. The parties understand that the Foundation is not a public agency or a governing body as defined in the Idaho Code and the Idaho Open Meeting Law and Access to Public Records Statutes. Nothing in this Operating Agreement shall be construed as a waiver of the Foundation’s right to assert exemption from these statutes.

C. *Name and Marks*. Each Party hereby is granted a general, non-exclusive, royalty-free license to use the corporate name of the other, specifically: "The University of Idaho" and

"The University of Idaho Foundation" and "The University of Idaho Foundation, Inc." in all activities conducted in association with or for the benefit of the other. Use of the other Party's name must be in manner that clearly identifies the Parties as separate entities, and neither Party may use the other Party's name to imply approval or action of the other Party. Neither Party may delegate, assign, or sublicense the rights granted hereunder without express written consent from the other Party. This license does not extend to any identifying marks of either Party other than the specified corporate name. Use of other marks must receive prior written approval.

D. *Identification of Source*. The Foundation shall be clearly identified as the source of any correspondence, activities and advertisements emanating from the Foundation.

E. *Establishing the Foundation's Annual Budget*. The Foundation shall provide the University with the Foundation's proposed annual operating budget and capital expenditure plan (if any) prior to the date the Foundation's Board of Directors meeting at which the Foundation's Board of Directors will vote to accept such operating budget. Any of the University's funding requests to the Foundation shall be communicated in writing by the President of the University to the Foundation's Treasurer by April 1 of each year.

F. *Attendance of the University's President at Foundation's Board of Director Meetings*. The Foundation may invite the University's President to attend meetings of the Foundation's Board of Directors and may act in an advisory capacity in such meetings.

G. *Supplemental Compensation of University Employees*. No University employee shall receive direct payments, compensation, or other benefits from the Foundation, provided that the Foundation may pay for those benefits which are necessary for its normal course of operation, including, but not limited to, travel and continuing professional education. Any such payment must be paid by the Foundation to the University and the University shall then pay or reimburse the employee in accordance with the University's normal practice. No University employee shall receive any payments or other benefits directly from the Foundation.

ARTICLE VI

AUDITS AND REPORTING REQUIREMENTS

A. *Fiscal Year*. The Foundation and the University shall have the same fiscal year.

B. *Annual Audit*. The Foundation shall have an annual financial audit conducted in accordance with Government Accounting Standards Board or Financial Accounting Standards Board principles as appropriate. The audit shall be conducted by an independent certified public accountant who is not a director or officer of the Foundation. Such audit shall be conducted at the same or similar time as the University audit and shall be reported to the Foundation's Board of Directors. Such audit reports shall contain the Foundation's financial statements and the auditor's independent opinion regarding such financial statements. All such reports and any accompanying documentation shall protect donor privacy to the extent allowable by law.

C. *Separate Audit Rights*. The University agrees that the Foundation, at its own expense, may at any time during normal business hours conduct or request additional audits or reviews of the University's books and records pertinent to the expenditure of donated funds. The Foundation agrees that the University, at its own expense, may, at reasonable times, inspect and audit the Foundation's financial books and accounting records in accordance with Article V, A above.

D. *Annual Reports to University President*. Upon request, the Foundation shall provide a written report to the University President setting forth the following items:

1. the annual financial audit report;

2. an annual report of Foundation transfers made to the University, summarized by University department;

3. an annual report of unrestricted funds received by the Foundation;

4. an annual report of unrestricted funds available for use during the current fiscal year;

5. a list of all of the Foundation's officers, directors, and employees;

6. a list of University employees for whom the Foundation made payments to the University for approved purpose during the fiscal year, and the amount and nature of each payment;

7. a list of all state and federal contracts and grants managed by the Foundation;

8. an annual report of the Foundation's major activities;

9. an annual report of each real estate purchase or material capital lease, investment, or financing arrangement entered into during the preceding Foundation fiscal year for the benefit of the University; and

10. an annual report of any actual litigation involving the Foundation during its fiscal year, identification of legal counsel used by the Foundation for any purpose during such year, and identification of any potential or threatened litigation involving the Foundation limited to the extent necessary to protect attorney-client privilege and litigation strategy.

ARTICLE VII

CONFLICT OF INTEREST AND CODE OF ETHICS AND CONDUCT

A. *Conflicts of Interest Policy Statement*. The Foundation has adopted a written policy addressing the manner the Foundation will address conflict of interest situations. The Foundation's Conflict of Interest Policy is attached hereto as Exhibit "G."

B. *Dual Representation*. Under no circumstances may a University employee represent both the University and the Foundation in any negotiation, sign for both Parties in transactions, or direct any other University employee under their immediate supervision to sign for the related Party in a transaction between the University and the Foundation. This shall not, however, prohibit University employees from drafting transactional documents that are subsequently provided to the Foundation for the Foundation's independent review, approval and use.

C. *Contractual Obligation of University*. The Foundation shall not enter into any contract that would impose a financial or contractual obligation on the University without first obtaining the prior written approval of the University. University approval of any such contract shall comply with policies of the State Board with respect to the State Board's approval of University contracts.

D. *Acquisition or Development or Real Estate*. The Foundation shall not acquire or develop real estate for the University's use or otherwise build facilities for the University's use unless the University first obtains the approval of the State Board. In the event of a proposed purchase of real estate for such purposes by the Foundation, the University shall notify the State Board, at the earliest possible date, of such proposed purchase for such purposes. Furthermore, any such proposed purchase of real estate for the University's use shall be a coordinated effort of the University and the Foundation. Any notification by the University to the State Board required pursuant to this Section may be made through the State Board's chief executive officer in executive session pursuant to Idaho Code Section 67-2345(1)(c).

ARTICLE VIII

GENERAL TERMS

A. *Effective Date*. This Agreement shall be effective on the date set forth above.

B. *Right to Terminate*. This Operating Agreement shall terminate upon the mutual written agreement of both Parties. In addition, either Party may, upon 90 days prior written notice to the other, terminate this Operating Agreement, and either Party may terminate this Operating Agreement in the event the other Party defaults in the performance of its obligations and fails to cure the default within 30 days after receiving written notice from the non-defaulting Party specifying the nature of the default. Should the University choose to terminate this Operating Agreement by providing 90 days written notice or in the event of a default by the Foundation that is not cured within the time frame set forth above, the Foundation may require the University to pay, within 180 days of written notice, all debt incurred by the Foundation on the University's behalf including, but not limited to, lease payments, advanced funds, and funds borrowed for specific initiatives. Should the Foundation choose to terminate this Operating Agreement by providing 90 days written notice or in the event of a default by the University that is not cured within the time frame set forth above, the University may require the Foundation to pay any debt it holds on behalf of the Foundation in like manner. The Parties agree that in the event this Operating Agreement shall terminate, they shall cooperate with one another in good faith to negotiate a new agreement within six (6) months. In the event negotiations fail, the Parties will initiate the Dispute Resolution mechanism described below (through reference to the Foundation's Chairman and the State Board) to further attempt to negotiate a new agreement. Termination of this Operating Agreement shall not constitute or cause dissolution of the Foundation.

C. *Dispute Resolution*. The Parties agree that in the event of any dispute arising from this Operating Agreement, they shall first attempt to resolve the dispute by working together with the appropriate staff members of each of the Parties. If the staff cannot resolve the dispute, then the dispute will be referred to the Foundation's Chairman and the University's President. If the Foundation's Chairman and University's President cannot resolve the dispute, then the dispute will be referred to the Foundation's Chairman and the State Board for resolution. If the dispute is not resolved by the aforementioned Parties, the University and the Foundation shall submit the dispute to mediation by an impartial third party or professional mediator mutually acceptable to the Parties. If and only if all the above mandatory steps are followed in sequence and the dispute remains unresolved, then, in such case, either Party shall have the right to initiate litigation arising from this Operating Agreement. In the event of litigation, the prevailing Party shall be entitled, in addition to any other rights and remedies it may have, to reimbursement for its expenses, including court costs, attorney fees, and other professional expenses.

D. *Dissolution of Foundation*. Upon dissolution of the Foundation, it shall transfer the balance of all property and assets of the Foundation in a manner consistent with its Articles of Incorporation, which state that in the event of dissolution of the Foundation, “no member, director, officer, or individual shall be entitled to or receive any distribution or division of its remaining assets, property or proceeds, and the balance of all property and assets of the [Foundation] from any source, after the payment of all debts and obligations of the [Foundation], shall be vested in the Board of Regents of the University of Idaho in trust for the use and benefit of the University. Any such assets not disposed of shall be distributed for one or more exempt purposes within the meaning of Section 501(c)(3) of the Internal Revenue Code, or shall be distributed to the federal government, or to a state or local government, for a public purpose.”

E. *Board Approval of Operating Agreement*. Prior to the Parties' execution of this Operating Agreement, an unexecuted copy of this Operating Agreement must be approved by the State Board. Furthermore, this Operating Agreement, including any subsequent modifications and restatements of this Operating Agreement, shall be submitted to the State Board for review and approval as required by the then applicable State Board policy (Section V.E.) and as ~~no less~~

~~frequently than once every two (2) years or more frequently if otherwise~~ requested by the State Board.

F. *Modification*. Any modification to the Agreement or Exhibits hereto shall be in writing and signed by both Parties.

G. *Providing Document to and Obtaining Approval from the University*. Unless otherwise indicated herein, whenever documents are to be provided to the University or whenever the University's approval of any action is required, such documents shall be provided to, or such approval shall be obtained from, the University's President or an individual to whom such authority has been properly delegated by the University's President.

H. *Providing Documents to and Obtaining Approval from the Foundation*. Unless otherwise indicated herein, whenever documents are to be provided to the Foundation or whenever the Foundation's approval of any action is required, such document shall be provided to, or such approval shall be obtained from, the Foundation's Board of Directors or an individual to whom such authority has been properly delegated by the Foundation's Board of Directors.

I. *Notices*. Any notices required under this agreement may be mailed or delivered as follows:

To the University:

President of the University of Idaho
University of Idaho
P.O. Box 443151
Administration Building Room 105
Moscow, Idaho 83844-3151

To the Foundation:

Executive Director
University of Idaho Foundation, Inc.
714 W. State Street, Suite 240
Boise, Idaho 83702

J. *No Joint Venture*. At all times and for all purposes of this Operating Agreement, the University and the Foundation shall act in an independent capacity and not as an agent or representative of the other Party.

K. *Liability*. The University and Foundation are independent entities and neither shall be liable for any of the other's contracts, torts, or other acts or omissions, or those of the other's trustees, directors, officers, members or employees.

L. *Indemnification*. The University and the Foundation each agree to indemnify, defend and hold the other Party, their officers, directors, agents and employees harmless from and against any and all losses, liabilities, and claims, including reasonable attorney's fees arising out of or resulting from the willful act, fault, omission, or negligence of the Party, its employees, contractors, or agents in performing its obligations under this Operating Agreement. This indemnification shall include, but not be limited to, any and all claims arising from an employee of one Party who is working for the benefit of the other Party. Nothing in this Operating Agreement shall be construed to extend to the University's liability beyond the limits of the Idaho Tort Claims Act, Idaho Code Sections 6-901 et seq.

M. *Assignment*. This Agreement is not assignable by either Party, in whole or in part.

N. *Governing Law*. This Agreement shall be governed by the laws of the State of Idaho.

O. *Articles, Sections, Subsections and Subparagraphs.* This Agreement consists of text divided into Articles that are identified by roman numeral (for example Article I), Sections that are identified by an uppercase letter followed by a period (for example A.), subsections that are identified by a number followed by a period (for example 1.) and subparagraphs that are identified by a lower case letter followed by a period (for example a.). The organization is hierarchical meaning that a reference to a division of the document includes all of its subsections (for example a reference to a Section includes the Section and all of its subsections and subparagraphs).

P. *Severability*. If any provision of this Agreement is held invalid or unenforceable to any extent, the remainder of this Agreement is not affected thereby and that provision shall be enforced to the greatest extent permitted by law.

Q. *Entire Agreement*. This Agreement constitutes the entire agreement among the Parties pertaining to the subject matter hereof, and supersedes all prior agreements and understandings pertaining thereto. Specifically, this Agreement continues and replaces the Operating Agreement entered into on August 31, 2009 by the Parties. Furthermore, this Agreement eliminates the First Addendum to Operating Agreement entered into on August 31, 2009, by the Parties, inasmuch as the transition period described therein has passed and the actions described therein have taken place.

IN WITNESS WHEREOF, the University and the Foundation have executed this agreement on the above specified date.

University of Idaho

By:____
Its: President

University of Idaho Foundation, Inc.

By:____
Its: Chairman

FIRST ADDENDUM TO OPERATING AGREEMENT
BETWEEN THE UNIVERSITY OF IDAHO AND
THE UNIVERSITY OF IDAHO FOUNDATION, INC.

~~This First Addendum to Operating Agreement ("First Addendum) is entered into effective the ___ day of ____________ 2009 by and between the University of Idaho ("University") and the University of Idaho Foundation, Inc. ("Foundation"). The University and the Foundation are sometimes collectively referred to herein separately as a "Party" and collectively as the "Parties."~~

~~PREAMBLE~~

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~~By unanimous vote on August 19, 2009, the Idaho State Board of Education and Board of Regents of the University of Idaho ("State Board") approved the terms of an operating agreement between the University and the Foundation ("Operating Agreement") and the transition of operating functions from the University to the Foundation to be accomplished as expeditiously as is practical while maintaining the necessary operations of the Foundation and the University. The Parties, in conjunction with the execution of the Operating Agreement, and pursuant to the approval of the State Board now also enter into this First Addendum to address certain timing issues with respect to the transition of Foundation operating functions currently handled through the University's Trust and Investment Office in order to come into full compliance with the terms of the Operating Agreement.~~

~~AGREEMENT~~

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~~**NOW THEREFORE**, in consideration of the mutual covenants and undertakings herein, and to supplement the terms of the Operating Agreement, the University and the Foundation hereby agree as follows:~~

~~1. The Parties acknowledge the following terms of the Operating Agreement:~~

~~a. Article II Section A.3. *Limited Authority of University Employees.* Notwithstanding the foregoing provisions, no University employee other than an employee loaned to the Foundation shall be permitted to have responsibility or authority for Foundation policy making, financial oversight, spending authority, investment decisions, or the supervision of Foundation employees.~~

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~~b. Article III Section D. *Support Staff Services.* The University shall provide administrative support in financial, accounting, investment and development services to the Foundation, as set forth in the Service Agreement attached hereto as Exhibit "C" ("Service Agreement"). Except as specifically provided otherwise herein, all University employees who provide support services to the Foundation shall remain University employees under the direction and control of the University, unless it is agreed that the direction and control of any such employee will be vested with the Foundation in a Loaned Employee Agreement. The Foundation will pay directly to the University the portion of the overhead costs associated with the services provided to the Foundation pursuant to the Service Agreement or as otherwise determined by the agreement of the Parties.~~

~~c. Article IV Section D.1. *Signature Authority*. The Foundation designates the Foundation Chairman and Treasurer as the individuals with signature authority for the Foundation in all financial transactions. The Foundation's Treasurer may also delegate signature authority on a temporary basis consistent with the Foundation's Bylaws to another Foundation employee, an employee loaned to the Foundation, or a Foundation Board member who is not a University employee. In no event may the person with Foundation signature authority for financial transactions be a University employee, unless such individual is an employee who is loaned to the Foundation.~~

~~2. The Parties acknowledge that currently various financial functions and transactions of the Foundation are performed by University employees through the University's Trust and Investment Office and that a transition will be necessary to come into full compliance with the Operating Agreement terms described in paragraph 1. above. This transition will include necessary revisions to the draft Service Agreement attached to the Operating Agreement as Exhibit C to more accurately describe the nature and extent of services to be provided the Foundation by the University, as well as the potential for additional loaned employee agreement[s].~~

~~3. The Parties agree to pursue this transition as expeditiously as is practical (with a target completion no later than close of the University's fiscal year, June 30, 2010) while maintaining the necessary operations of the Foundation and the University. In that regard, and during the transition period, University employees through the Trust and Investment Office will continue to support the operations of the Foundation as is necessary to ensure continued operations and neither Party will consider the other in default of the Operating Agreement by virtue of such support by the Trust and Investment Office. Upon completion of the transition, the Parties will execute an addendum to the Operating Agreement acknowledging the full effect of all aspects of the Operating Agreement.~~

~~IN WITNESS WHEREOF, the University and the Foundation have executed this First Addendum on the above specified date.~~

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University of Idaho	University of Idaho Foundation, Inc.
By:______________________________ Its: President	By:______________________________ Its: Chairman

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OPERATING AGREEMENT
THE UNIVERSITY OF IDAHO AND
THE UNIVERSITY OF IDAHO FOUNDATION, INC.

This agreement ("Operating Agreement") is entered into effective the ___ day of ____________ 2016 by and between the University of Idaho ("University") and the University of Idaho Foundation, Inc. ("Foundation"), as amended, it is a continuation and restatement of the Operating Agreement entered into on August 31, 2009, which it fully replaces. The University and the Foundation are sometimes collectively referred to herein separately as a "Party" and collectively as the "Parties."

WHEREAS, the Foundation is a nonprofit corporation incorporated on September 23, 1970, pursuant to the Idaho Nonprofit Corporation Act;

WHEREAS, the Foundation has been recognized as a tax-exempt entity under Section 501(c)(3) of the Internal Revenue Code;

WHEREAS, the Foundation's mission includes the management and distribution of private support to enhance the growth and development of the University;

WHEREAS, the Foundation and the University desire to set forth in writing various aspects of their relationship with respect to matters such as the solicitation, receipt, management, transfer and expenditure of funds;

WHEREAS, the Idaho State Board of Education and the Board of Regents of the University of Idaho (collectively the "State Board") have promulgated Policies and Procedures to be effective as of July of 2008 ("State Board's Policies and Procedures") which are attached hereto as Exhibit "A";

WHEREAS, Section V.E.2.c. of the State Board's Policies and Procedures requires the University to enter into a written operating agreement with the Foundation that sets forth their operating relationship; and

WHEREAS, the Foundation and the University intend for this agreement to be the written operating agreement required by Section V.E.2.c. of the State Board's Policies and Procedures.

NOW THEREFORE, in consideration of the mutual covenants and undertakings herein, the University and the Foundation hereby agree as follows:

ARTICLE I

FOUNDATION'S PURPOSES

The Foundation is the primary affiliated foundation responsible for assisting the University in soliciting, managing and distributing private support for the University. Accordingly, to the extent consistent with the Foundation's Articles of Incorporation and By-Laws, and the State Board's Policies and Procedures, the Foundation shall: (1) assist in the solicitation of, receive and accept gifts, devises, bequests and other direct or indirect contributions of money and other property made for the benefit of the University from the general public (including individuals, corporations, other entities and other sources); (2) manage and invest the money and property it receives for the benefit of the University; and (3) support and assist the University in fundraising and donor relations.

In carrying out its purposes the Foundation shall not engage in activities that conflict with (1) federal or state laws, rules and regulations (including, but not limited to all applicable provisions of the Internal Revenue Code and corresponding Federal Treasury Regulations); (2) applicable polices of the State Board; or (3) the role and mission of the University.

ARTICLE II

FOUNDATION'S ORGANIZATIONAL DOCUMENTS

The Foundation shall provide copies of its current Articles of Incorporation and Bylaws to the University. All amendments of such documents shall also be provided to the University. Furthermore, the Foundation shall, to the extent practicable, provide the University with an advance copy of any proposed amendments to the Foundation's Articles of Incorporation and Bylaws.

ARTICLE III

UNIVERSITY RESOURCES AND SERVICES

A. *University Employees*.

1. *Liaison*: The University's Vice President for University Advancement shall serve as the University's liaison to the Foundation (the "Liaison"). The duties and responsibilities of the Liaison are as follows:

a. The Liaison shall be responsible for communicating with the Foundation regarding the University’s fundraising efforts and for coordinating any administrative support provided by the University to the Foundation.

b. The Liaison or the Liaison's designee shall attend each meeting of the Foundation's Board of Directors and shall report on behalf of the University to the Foundation's Board of Directors regarding the University's fundraising efforts. The Liaison may also report other information to the Foundation's Board of Directors that is pertinent to the common goals of the University and the Foundation.

2. *Executive Director*: The Executive Director of the Foundation is an employee of the University who is loaned to the Foundation. All of the Executive Director's services shall be provided directly to the Foundation as follows:

a. The Executive Director shall be responsible for the supervision and control of the day-to-day operations of the Foundation. More specific duties of the Executive Director may be set forth in a written job description prepared by the Foundation and attached to the Loaned Employee Agreement described in subparagraph c below. The Executive Director shall be subject to the control and direction of the Foundation.

b. The Executive Director shall be an employee of the University and entitled to University benefits to the same extent and on the same terms as other full-time University employees of the same classification as the Executive Director. The Foundation shall reimburse the University for all costs incurred by the University in connection with the University's employment of the Executive Director including such expenses as salary, payroll taxes, and benefits.

c. The Foundation and the University shall enter into a written agreement, substantially in the form of Exhibit "B" hereto, establishing that the Executive Director is an employee of the University but subject to the direction and control of the Foundation (generally a "Loaned Employee Agreement"). The Loaned Employee Agreement shall also set forth the relative rights and responsibilities of the Foundation and the University with respect to the Executive Director.

d. In the event the Executive Director resigns, is terminated according to the terms of the Loaned Employee Agreement, or otherwise leaves the employ of the University, hiring of the subsequent Executive Director shall be done in accordance with Foundation procedures, University procedures (including University equal employment procedures), and applicable law (including laws applicable to the University). The Foundation shall have the ability to terminate the Loaned Employee Agreement upon notice to the University as further set forth in the Loaned Employee Agreement. The Foundation must provide the University with prior approval to hire any employee that the Foundation and University intend to be a loaned employee before the University employs such individual.

e. The University and the Foundation may elect to enter into additional agreements for the loaning of additional employees to the Foundation by the University pursuant to terms substantially similar to the Loaned Employee Agreement attached as Exhibit "B." The additional loaned employees shall report to either the Foundation Board or the Executive Director of the Foundation, in either case as determined by the Foundation Board and as specified in the additional loaned employee agreements. Such loaned employees shall have no function at the University other than to act in their capacity as employees loaned to the Foundation.

f. Termination of the Executive Director in accordance with the Loaned Employee Agreement shall constitute grounds for a termination proceeding by the University or for non-renewal of the Executive Director's contract with the University, if any.

3. *Limited Authority of University Employees*. Notwithstanding the foregoing provisions, no University employee other than an employee loaned to the Foundation shall be permitted to have responsibility or authority for Foundation policy making, financial oversight, spending authority, investment decisions, or the supervision of Foundation employees.

B. *Support Staff Services*. The University shall provide administrative support in financial, accounting, investment and development services to the Foundation, as set forth in the Service Agreement attached hereto as Exhibit "C" ("Service Agreement"). Except as specifically provided otherwise herein, all University employees who provide support services to the Foundation shall remain University employees under the direction and control of the University, unless it is agreed that the direction and control of any such employee will be vested with the Foundation in a Loaned Employee Agreement. The Foundation will pay directly to the University the portion of the overhead costs associated with the services provided to the Foundation pursuant to the Service Agreement or as otherwise determined by the agreement of the Parties.

C. *University Facilities and Equipment*. The University shall provide the use of the University's office space, equipment and associated services to the Foundation's employees upon the terms agreed to by the University and the Foundation. The terms of use (including amount of rent) of the University's office space, equipment and associated services shall be as set forth in the Service Agreement.

D. *No Foundation Payments to University Employees*. Notwithstanding any contrary provision of this Agreement to the contrary, the Foundation shall not make any payments directly to a University employee in connection with any resources or services provided to the Foundation pursuant to this Article.

ARTICLE IV

MANAGEMENT AND OPERATION OF FOUNDATION

A. *Gift Solicitation*.

1. *Form of Solicitation*. Any and all Foundation gift solicitations shall make clear to prospective donors that (1) the Foundation is a separate legal and tax entity organized for the purpose of encouraging voluntary, private gifts, trusts, and bequests for the benefit of the University; and (2) responsibility for the governance of the Foundation, including the investment of gifts and endowments, resides in the Foundation's Board of Directors.

2. *Foundation is Primary Donee*. Absent unique circumstances, prospective donors shall be requested to make gifts directly to the Foundation rather than to the University.

B. *Acceptance of Gifts*.

1. *Approval Required Before Acceptance of Certain Gifts*. Before accepting contributions or grants for restricted or designated purposes that may require administration or direct expenditure by the University, the Foundation shall obtain the prior written approval of the University. Similarly, the Foundation shall also obtain the University's prior written approval of the acceptance of any gift or grant that would impose a binding financial or contractual obligation on the University. Prior to any approval by the University, the University shall obtain approval of the State Board where State Board policy requires such approval.

2. *Acceptance of Gifts of Real Property*. The Foundation shall conduct due diligence on all gifts of real property that it receives. All gifts of real property that are intended solely by the donor to be developed for the University's use or to otherwise house facilities of any kind for the University's use shall be approved by the State Board before such gifts are accepted by either the University or the Foundation. The University shall be responsible for obtaining this approval by the State Board. In cases where the real property is intended to be used by the University in connection with carrying out its proper functions, the real property may be conveyed directly to the University, in which case the University and not the Foundation shall be responsible for the due diligence obligations for such property.

3. *Processing of Accepted Gifts*. All gifts received by the University or the Foundation shall be delivered (if cash) or reported (if any other type of property) to the Foundation's designated Gift Administration Office (a unit of the University's Trust and Investment Office) in accordance with the Service Agreement.

C. *Fund Transfers*. The Foundation agrees to transfer funds, both current gifts and income from endowments, to the University on a regular basis as agreed to by the Parties. The Foundation's Treasurer or other individual to whom such authority has been delegated by the Foundation's Board of Directors shall be responsible for transferring funds as authorized by the Foundation's Board of Directors. All transfers and expenditures noted in this Section must comply with Section 501(c)(3) of the Internal Revenue Code and be consistent with the Foundation's sole mission to support the University.

1. *Restricted Gift Transfers*. The Foundation may transfer restricted gifts to the University. Any such transferred restricted gifts will only be expended by the University pursuant to the terms of such restrictions. The Foundation shall inform the University officials into whose program or department restricted gifts are transferred of all restrictions on the use of such gifts and provide such officials with access to any relevant documentation concerning such restrictions. Such University officials shall account for such restricted gifts separate from other program and department funds in accordance with applicable University policies and shall notify the Foundation on a timely basis regarding the uses of such restricted gifts.

2. *Unrestricted Gift Transfers*. The Foundation may utilize any unrestricted gifts it receives for any use consistent with the Foundation's purposes as generally summarized in

Article I of this Operating Agreement. The Foundation may make unrestricted donations to the University. Such donated funds will be expended under the oversight of the University President in compliance with state law and University policies. If the Foundation elects to use unrestricted gifts to make grants to the University, such grants shall be made at such times and in such amounts as the Foundation's Board of Directors may determine in such Board's sole discretion.

D. *Foundation Expenditures and Financial Transactions*.

1. *Signature Authority*. The Foundation designates the Foundation Chairman and Treasurer as the individuals with signature authority for the Foundation in all financial transactions. The Foundation's Treasurer may also delegate signature authority on a temporary basis consistent with the Foundation's Bylaws to another Foundation employee, an employee loaned to the Foundation, or a Foundation Board member who is not a University employee. In no event may the person with Foundation signature authority for financial transactions be a University employee, unless such individual is an employee who is loaned to the Foundation.

2. *Expenditures*. All expenditures of the Foundation shall be (1) consistent with the purposes of the Foundation, and (2) not violate restrictions imposed by the donor or the Foundation as to the use or purpose of the specific funds.

E. *University Report on Distributed Funds*. On a regular basis, which shall not be less than annually, the University shall report to the Foundation on the use of restricted and unrestricted funds transferred to the University. This report shall specify the restrictions on any restricted funds and the uses of such funds.

F. *Transfer of University Assets to the Foundation*. No University funds, assets, or liabilities may be transferred directly or indirectly to the Foundation without the prior approval of the State Board except when:

1. A donor inadvertently directs a contribution to the University that is intended for the Foundation in which case such funds may be transferred to the Foundation so long as the documents associated with the gift indicate the Foundation was the intended recipient of the gift. In the absence of any such indication of donor intent, such gift shall be deposited in a University account and, except for transfers described in subsections 2 and 4 of this Section, State Board approval will be required prior to the University's transfer of such funds to the Foundation.

2. The University has gift funds that were originally transferred to the University from the Foundation and the University wishes to return a portion of those funds to the Foundation for reinvestment consistent with the original intent of the gift.

3. The University has raised scholarship funds through a University activity and the University wishes to deposit the funds with the Foundation for investment and distribution consistent with the scholarship purposes for which the funds were raised.

4. The University transfers to the Foundation any gift received by the University from a donor that meets the following criteria: (i) the gift is less than $10,000, and (ii) the gift will be invested by the Foundation for scholarship or other general University support purposes. This subsection, however, shall not apply to payments by the University to the Foundation for University obligations to the Foundation, operating expenses of the Foundation or other costs of the Foundation.

G. *Separation of Funds*. All Foundation assets (including bank and investment accounts) shall be held in separate accounts in the name of the Foundation using the Foundation's Federal Employer Identification Number. The financial records of the Foundation shall be kept using a separate chart of accounts and shall be kept in a secured database that is protected by separate password-only access. For convenience, however, some Foundation expenses may be paid through the University such as payroll and campus charges. These expenses will be paid through accounts clearly titled as belonging to the Foundation and shall be reimbursed by the Foundation on a regular basis.

H. *Insurance*. To the extent that the Foundation is not covered by the State of Idaho Retained Risk Program, the Foundation shall maintain insurance to cover the operations and activities of its directors, officers and employees. The Foundation shall also maintain general liability coverage.

I. *Investment Policies*. All funds held by the Foundation, except those intended for short term expenditures, shall be invested in accordance with the Uniform Prudent Management of Institutional Funds Act, Idaho Code Sections 33-5001 to 33-5010, and the Foundation's investment policy which is attached hereto as Exhibit "D"; provided, however, the Foundation shall not invest any funds in a manner that would violate the applicable terms of any restricted gifts. The Foundation shall provide to the University any updates to such investment policy which updates shall also be attached hereto as Exhibit "D".

J. *Organization Structure of the Foundation*. The organizational structure of the Foundation is set forth in the Foundation's Articles of Incorporation which are attached hereto as Exhibit "E" and the Foundation's By-Laws dated January 30, 2009, which are attached at Exhibit "F." The Foundation agrees to provide copies of such Articles and By-Laws as well as any subsequent amendments to such documents to the University. Any such amendments to the Articles and By-Laws shall be attached hereto as additions to Exhibit "E" and Exhibit "F", respectively.

K. *Conflicts of Interest*. The Foundation has adopted a written policy addressing the manner the Foundation will address conflict of interest situations. The Foundation's Conflict of Interest Policy is attached hereto as Exhibit "G."

ARTICLE V

FOUNDATION RELATIONSHIPS WITH THE UNIVERSITY

A. *Access to Records*. The University shall have reasonable access to the financial records of the Foundation upon permission granted by the Foundation from time to time, which shall not be unreasonably withheld. All access by the University of such records shall be made in accordance with applicable laws, Foundation policies, and guidelines. In addition, upon request of the Foundation, the University shall execute a proprietary and confidentiality agreement and instruct its agents and employees that all confidential information of the Foundation shall be protected from disclosure. Except as specifically authorized under this agreement or the applicable proprietary and confidentiality agreement between the University and the Foundation, the University's access shall not include donor specific data of the Foundation such that would provide individually identifiable information about donors or their donations made to the Foundation.

B. *Records Management*.

1. The University acknowledges that in most cases the University is the primary recipient and depository of confidential donor information. The Parties recognize, however, that the records of the Foundation relating to actual or potential donors contain confidential information. Such records shall be kept by the Foundation in such a manner as to protect donor confidentiality to the fullest extent allowed by law. Notwithstanding the access to records permitted above, access to such confidential information by the University shall be limited to the University's President and any designee of the University's President. The donor database and all other data, materials and information of the Foundation and the University pertaining to past, current or prospective donors, are proprietary to the Foundation and the University respectively and constitute confidential information and trade secrets. The Foundation and University shall take the steps necessary to monitor and control access to the donor database and to protect the security of computer servers and software relevant to the database, in each case to the extent that these systems are in their respective control.

2. The Foundation shall be responsible for maintaining all permanent records of the Foundation including but not limited to the Foundation's Articles, By-Laws and other governing documents, all necessary documents for compliance with IRS regulations, all gift instruments, and all other Foundation records as required by applicable laws.

3. The Foundation’s Board of Directors shall foster an atmosphere of openness in its operations, consistent with the prudent conduct of its business. The parties understand that the Foundation is not a public agency or a governing body as defined in the Idaho Code and the Idaho Open Meeting Law and Access to Public Records Statutes. Nothing in this Operating Agreement shall be construed as a waiver of the Foundation’s right to assert exemption from these statutes.

C. *Name and Marks*. Each Party hereby is granted a general, non-exclusive, royalty-free license to use the corporate name of the other, specifically: "The University of Idaho" and

"The University of Idaho Foundation" and "The University of Idaho Foundation, Inc." in all activities conducted in association with or for the benefit of the other. Use of the other Party's name must be in manner that clearly identifies the Parties as separate entities, and neither Party may use the other Party's name to imply approval or action of the other Party. Neither Party may delegate, assign, or sublicense the rights granted hereunder without express written consent from the other Party. This license does not extend to any identifying marks of either Party other than the specified corporate name. Use of other marks must receive prior written approval.

D. *Identification of Source*. The Foundation shall be clearly identified as the source of any correspondence, activities and advertisements emanating from the Foundation.

E. *Establishing the Foundation's Annual Budget*. The Foundation shall provide the University with the Foundation's proposed annual operating budget and capital expenditure plan (if any) prior to the date the Foundation's Board of Directors meeting at which the Foundation's Board of Directors will vote to accept such operating budget. Any of the University's funding requests to the Foundation shall be communicated in writing by the President of the University to the Foundation's Treasurer by April 1 of each year.

F. *Attendance of the University's President at Foundation's Board of Director Meetings*. The Foundation may invite the University's President to attend meetings of the Foundation's Board of Directors and may act in an advisory capacity in such meetings.

G. *Supplemental Compensation of University Employees*. No University employee shall receive direct payments, compensation, or other benefits from the Foundation, provided that the Foundation may pay for those benefits which are necessary for its normal course of operation, including, but not limited to, travel and continuing professional education. Any such payment must be paid by the Foundation to the University and the University shall then pay or reimburse the employee in accordance with the University's normal practice. No University employee shall receive any payments or other benefits directly from the Foundation.

ARTICLE VI

AUDITS AND REPORTING REQUIREMENTS

A. *Fiscal Year*. The Foundation and the University shall have the same fiscal year.

B. *Annual Audit*. The Foundation shall have an annual financial audit conducted in accordance with Government Accounting Standards Board or Financial Accounting Standards Board principles as appropriate. The audit shall be conducted by an independent certified public accountant who is not a director or officer of the Foundation. Such audit shall be conducted at the same or similar time as the University audit and shall be reported to the Foundation's Board of Directors. Such audit reports shall contain the Foundation's financial statements and the auditor's independent opinion regarding such financial statements. All such reports and any accompanying documentation shall protect donor privacy to the extent allowable by law.

C. *Separate Audit Rights*. The University agrees that the Foundation, at its own expense, may at any time during normal business hours conduct or request additional audits or reviews of the University's books and records pertinent to the expenditure of donated funds. The Foundation agrees that the University, at its own expense, may, at reasonable times, inspect and audit the Foundation's financial books and accounting records in accordance with Article V, A above.

D. *Annual Reports to University President*. Upon request, the Foundation shall provide a written report to the University President setting forth the following items:

1. the annual financial audit report;

2. an annual report of Foundation transfers made to the University, summarized by University department;

3. an annual report of unrestricted funds received by the Foundation;

4. an annual report of unrestricted funds available for use during the current fiscal year;

5. a list of all of the Foundation's officers, directors, and employees;

6. a list of University employees for whom the Foundation made payments to the University for approved purpose during the fiscal year, and the amount and nature of each payment;

7. a list of all state and federal contracts and grants managed by the Foundation;

8. an annual report of the Foundation's major activities;

9. an annual report of each real estate purchase or material capital lease, investment, or financing arrangement entered into during the preceding Foundation fiscal year for the benefit of the University; and

10. an annual report of any actual litigation involving the Foundation during its fiscal year, identification of legal counsel used by the Foundation for any purpose during such year, and identification of any potential or threatened litigation involving the Foundation limited to the extent necessary to protect attorney-client privilege and litigation strategy.

ARTICLE VII

Conflict of Interest and Code of Ethics and Conduct

A. *Conflicts of Interest Policy Statement*. The Foundation has adopted a written policy addressing the manner the Foundation will address conflict of interest situations. The Foundation's Conflict of Interest Policy is attached hereto as Exhibit "G."

B. *Dual Representation*. Under no circumstances may a University employee represent both the University and the Foundation in any negotiation, sign for both Parties in transactions, or direct any other University employee under their immediate supervision to sign for the related Party in a transaction between the University and the Foundation. This shall not, however, prohibit University employees from drafting transactional documents that are subsequently provided to the Foundation for the Foundation's independent review, approval and use.

C. *Contractual Obligation of University*. The Foundation shall not enter into any contract that would impose a financial or contractual obligation on the University without first obtaining the prior written approval of the University. University approval of any such contract shall comply with policies of the State Board with respect to the State Board's approval of University contracts.

D. *Acquisition or Development or Real Estate*. The Foundation shall not acquire or develop real estate for the University’s use or otherwise build facilities for the University's use unless the University first obtains the approval of the State Board. In the event of a proposed purchase of real estate for such purposes by the Foundation, the University shall notify the State Board, at the earliest possible date, of such proposed purchase for such purposes. Furthermore, any such proposed purchase of real estate for the University's use shall be a coordinated effort of the University and the Foundation. Any notification by the University to the State Board required pursuant to this Section may be made through the State Board's chief executive officer in executive session pursuant to Idaho Code Section 67-2345(1)(c).

ARTICLE VIII

General Terms

A. *Effective Date*. This Agreement shall be effective on the date set forth above.

B. *Right to Terminate*. This Operating Agreement shall terminate upon the mutual written agreement of both Parties. In addition, either Party may, upon 90 days prior written notice to the other, terminate this Operating Agreement, and either Party may terminate this Operating Agreement in the event the other Party defaults in the performance of its obligations and fails to cure the default within 30 days after receiving written notice from the non-defaulting Party specifying the nature of the default. Should the University choose to terminate this Operating Agreement by providing 90 days written notice or in the event of a default by the Foundation that is not cured within the time frame set forth above, the Foundation may require the University to pay, within 180 days of written notice, all debt incurred by the Foundation on the University's behalf including, but not limited to, lease payments, advanced funds, and funds borrowed for specific initiatives. Should the Foundation choose to terminate this Operating Agreement by providing 90 days written notice or in the event of a default by the University that is not cured within the time frame set forth above, the University may require the Foundation to pay any debt it holds on behalf of the Foundation in like manner. The Parties agree that in the event this Operating Agreement shall terminate, they shall cooperate with one another in good faith to negotiate a new agreement within six (6) months. In the event negotiations fail, the Parties will initiate the Dispute Resolution mechanism described below (through reference to the Foundation's Chairman and the State Board) to further attempt to negotiate a new agreement. Termination of this Operating Agreement shall not constitute or cause dissolution of the Foundation.

C. *Dispute Resolution*. The Parties agree that in the event of any dispute arising from this Operating Agreement, they shall first attempt to resolve the dispute by working together with the appropriate staff members of each of the Parties. If the staff cannot resolve the dispute, then the dispute will be referred to the Foundation's Chairman and the University's President. If the Foundation's Chairman and University's President cannot resolve the dispute, then the dispute will be referred to the Foundation's Chairman and the State Board for resolution. If the dispute is not resolved by the aforementioned Parties, the University and the Foundation shall submit the dispute to mediation by an impartial third party or professional mediator mutually acceptable to the Parties. If and only if all the above mandatory steps are followed in sequence and the dispute remains unresolved, then, in such case, either Party shall have the right to initiate litigation arising from this Operating Agreement. In the event of litigation, the prevailing Party shall be entitled, in addition to any other rights and remedies it may have, to reimbursement for its expenses, including court costs, attorney fees, and other professional expenses.

D. *Dissolution of Foundation*. Upon dissolution of the Foundation, it shall transfer the balance of all property and assets of the Foundation in a manner consistent with its Articles of Incorporation, which state that in the event of dissolution of the Foundation, “no member, director, officer, or individual shall be entitled to or receive any distribution or division of its remaining assets, property or proceeds, and the balance of all property and assets of the [Foundation] from any source, after the payment of all debts and obligations of the [Foundation], shall be vested in the Board of Regents of the University of Idaho in trust for the use and benefit of the University. Any such assets not disposed of shall be distributed for one or more exempt purposes within the meaning of Section 501(c)(3) of the Internal Revenue Code, or shall be distributed to the federal government, or to a state or local government, for a public purpose.”

E. *Board Approval of Operating Agreement*. Prior to the Parties' execution of this Operating Agreement, an unexecuted copy of this Operating Agreement must be approved by the State Board. Furthermore, this Operating Agreement, including any subsequent modifications and restatements of this Operating Agreement, shall be submitted to the State Board for review and approval as required by the then applicable State Board policy (Section V.E.) and as requested by the State Board.

F. *Modification*. Any modification to the Agreement or Exhibits hereto shall be in writing and signed by both Parties.

G. *Providing Document to and Obtaining Approval from the University*. Unless otherwise indicated herein, whenever documents are to be provided to the University or whenever the University's approval of any action is required, such documents shall be provided to, or such approval shall be obtained from, the University's President or an individual to whom such authority has been properly delegated by the University's President.

H. *Providing Documents to and Obtaining Approval from the Foundation*. Unless otherwise indicated herein, whenever documents are to be provided to the Foundation or whenever the Foundation's approval of any action is required, such document shall be provided to, or such approval shall be obtained from, the Foundation's Board of Directors or an individual to whom such authority has been properly delegated by the Foundation's Board of Directors.

I. *Notices*. Any notices required under this agreement may be mailed or delivered as follows:

To the University:

President of the University of Idaho
University of Idaho
P.O. Box 443151
Administration Building Room 105
Moscow, Idaho 83844-3151

To the Foundation:

Executive Director
University of Idaho Foundation, Inc.
714 W. State Street, Suite 240
Boise, Idaho 83702

J. *No Joint Venture*. At all times and for all purposes of this Operating Agreement, the University and the Foundation shall act in an independent capacity and not as an agent or representative of the other Party.

K. *Liability*. The University and Foundation are independent entities and neither shall be liable for any of the other's contracts, torts, or other acts or omissions, or those of the other's trustees, directors, officers, members or employees.

L. *Indemnification*. The University and the Foundation each agree to indemnify, defend and hold the other Party, their officers, directors, agents and employees harmless from and against any and all losses, liabilities, and claims, including reasonable attorney's fees arising out of or resulting from the willful act, fault, omission, or negligence of the Party, its employees, contractors, or agents in performing its obligations under this Operating Agreement. This indemnification shall include, but not be limited to, any and all claims arising from an employee of one Party who is working for the benefit of the other Party. Nothing in this Operating Agreement shall be construed to extend to the University's liability beyond the limits of the Idaho Tort Claims Act, Idaho Code Sections 6-901 et seq.

M. *Assignment*. This Agreement is not assignable by either Party, in whole or in part.

N. *Governing Law*. This Agreement shall be governed by the laws of the State of Idaho.

O. *Articles, Sections, Subsections and Subparagraphs.* This Agreement consists of text divided into Articles that are identified by roman numeral (for example Article I), Sections that are identified by an uppercase letter followed by a period (for example A.), subsections that are identified by a number followed by a period (for example 1.) and subparagraphs that are identified by a lower case letter followed by a period (for example a.). The organization is hierarchical meaning that a reference to a division of the document includes all of its subsections (for example a reference to a Section includes the Section and all of its subsections and subparagraphs).

P. *Severability*. If any provision of this Agreement is held invalid or unenforceable to any extent, the remainder of this Agreement is not affected thereby and that provision shall be enforced to the greatest extent permitted by law.

Q. *Entire Agreement*. This Agreement constitutes the entire agreement among the Parties pertaining to the subject matter hereof, and supersedes all prior agreements and understandings pertaining thereto. Specifically, this Agreement continues and replaces the Operating Agreement entered into on August 31, 2009 by the Parties. Furthermore, this Agreement eliminates the First Addendum to Operating Agreement entered into on August 31, 2009, by the Parties, inasmuch as the transition period described therein has passed and the actions described therein have taken place.

IN WITNESS WHEREOF, the University and the Foundation have executed this agreement on the above specified date.

University of Idaho

By:____
Its: President

University of Idaho Foundation, Inc.

By:____
Its: Chairman

Exhibit A

SBOE Policy Section V.E Gifts and Affiliated Foundations

Idaho State Board of Education
GOVERNING POLICIES AND PROCEDURES
SECTION: V. FINANCIAL AFFAIRS
Subsection: E. Gifts and Affiliated Foundations October 2014

1. Purpose of the Policy

   a. The Board recognizes the importance of voluntary private support and encourages grants and contributions for the benefit of the institutions and agencies under its governance. Private support for public education is an accepted and firmly established practice throughout the United States. Tax-exempt foundations are one means of providing this valuable support to help the institutions and agencies under the Board's governance raise money through private contributions. Foundations are separate, legal entities, tax-exempt under Section 501(c) of the United States Internal Revenue Code of 1986, as amended, associated with the institutions and agencies under the Board's governance. Foundations are established for the purpose of raising, receiving, holding, and/or using funds from the private sector for charitable, scientific, cultural, educational, athletic, or related endeavors that support, enrich, and improve the institutions or agencies. The Board wishes to encourage a broad base of support from many sources, particularly increased levels of voluntary support. To achieve this goal, the Board will cooperate in every way possible with the work and mission of recognized affiliated foundations.

   b. The Board recognizes that foundations:

      i. Provide an opportunity for private individuals and organizations to contribute to the institutions and agencies under the Board's governance with the assurance that the benefits of their gifts supplement, not supplant, state appropriations to the institutions and agencies;

      ii. Provide assurance to donors that their contributions will be received, distributed, and utilized as requested for specified purposes, to the extent legally permissible, and that donor records will be kept confidential to the extent requested by the donor and as allowed by law;

      iii. Provide an instrument through which alumni and community leaders can help strengthen the institutions and agencies through participation in the solicitation, management, and distribution of private gifts; and

      iv. Aid and assist the Board in attaining its approved educational, research, public service, student loan and financial assistance, alumni relations, and financial development program objectives.

c. The Board, aware of the value of tax-exempt foundations to the well being of the institutions and agencies under the Board's governance, adopts this policy with the following objectives:

i. To preserve and encourage the operation of recognized foundations associated with the institutions and agencies under the Board's governance; and

ii. To ensure that the institutions and agencies under the Board's governance work with their respective affiliated foundations to make certain that business is conducted responsibly and according to applicable laws, rules, regulations, and policies, and that such foundations fulfill their obligations to contributors, to those who benefit from their programs, and to the general public.

2. Institutional Foundations

The foregoing provisions are designed to promote and strengthen the operations of foundations that have been, and may be, established for the benefit of the public colleges and universities in Idaho. The intent of this policy is to describe general principles that will govern institutional relationships with their affiliated foundations. It is intended that a more detailed and specific description of the particular relationship between an institution and its affiliated foundation will be developed and committed to a written operating agreement, which must be approved by the Board. For application of this policy to affiliated research foundations and technology transfer organizations, including the Idaho Research Foundation, see paragraph 6 below.

a. Board Recognition of Affiliated Foundations

. The Board may recognize an entity as an affiliated foundation if it meets and maintains the requirements of this policy. The chief executive officer of each institution must ensure that any affiliated foundation recognized by the Board ascribes to these policies. The Board acknowledges that it cannot and should not have direct control over affiliated foundations. These foundations must be governed separately to protect their private, independent status. However, because the Board is responsible for ensuring the integrity and reputation of the institutions and their campuses and programs, the Board must be assured that any affiliated foundation adheres to sound business practices and ethical standards appropriate to such organizations in order to assure the public that the foundation is conducting its mission with honesty and integrity.

b. General Provisions Applicable to all Affiliated Foundations recognized by the Board

i. All private support of an institution not provided directly to such institution shall be through a recognized affiliated foundation. While an institution may accept gifts made directly to the institution or directly to the Board, absent unique circumstances making a direct gift to the institution more appropriate, donors shall be requested to make gifts to affiliated foundations.

ii. Each affiliated foundation shall operate as an Idaho nonprofit corporation that is legally separate from the institution and is recognized as a 501(c)(3) public charity by the Internal Revenue Service. The management and control of a foundation shall rest with its governing board. All correspondence, solicitations, activities, and advertisements concerning a particular foundation shall be clearly discernible as from that foundation, and not the institution.

iii. The institutions and foundations are independent entities and neither will be liable for any of the other's contracts, torts, or other acts or omissions, or those of the other's trustees, directors, officers, members, or staff.

iv. It is the responsibility of the foundation to support the institution at all times in a cooperative, ethical, and collaborative manner; to engage in activities in support of the institution; and, where appropriate, to assist in securing resources, to administer assets and property in accordance with donor intent, and to manage its assets and resources.

v. Foundation funds shall be kept separate from institution funds. No institutional funds, assets, or liabilities may be transferred directly or indirectly to a foundation without the prior approval of the Board except as provided herein. Funds may be transferred from an institution to a foundation without prior Board approval when:

1) A donor inadvertently directs a contribution to an institution that is intended for the foundation. If an affiliated foundation is the intended recipient of funds made payable to the Board or to an institution, then such funds may be deposited with or transferred to the affiliated foundation, provided that accompanying documents demonstrate that the foundation is the intended recipient. Otherwise, the funds shall be deposited in an institutional account, and Board approval will be required prior to transfer to an affiliated foundation; or

2) The institution has gift funds that were transferred from and originated in an affiliated foundation, and the institution wishes to return a portion of funds to the foundation for reinvestment consistent with the original intent of the gift.

vi. Transactions between an institution and an affiliated foundation shall meet the normal tests for ordinary business transactions, including proper documentation and approvals. Special attention shall be given to avoiding direct or indirect conflicts of interest between the institution and the affiliated foundation and those with whom the foundation does business. Under no circumstances shall an institution employee represent both the institution and foundation in any negotiation, sign for both the institution and foundation in a particular transaction, or direct any other institution employee under their immediate supervision to sign for the related party in a transaction between the institution and the foundation.

vii. Prior to the start of each fiscal year, an affiliated foundation must provide the institution chief executive officer with the foundation's proposed annual budget, as approved by the foundation's governing board.

viii. Each foundation shall conduct its fiscal operations to conform to the institution's fiscal year. Each foundation shall prepare its annual financial statements in accordance with Government Accounting Standards Board (GASB) or Financial Accounting Standards Board (FASB) principles, as appropriate.

ix. Institution chief executive officers shall be invited to attend all meetings of an affiliated foundation's governing board in an advisory role. On a case by case basis, other institution employees may also serve as advisors to an affiliated foundation's governing board, as described in the written foundation operating agreement approved by the Board.

x. The foundation, while protecting personal and private information related to private individuals, is encouraged, to the extent possible or reasonable, to be open to public inquiries related to revenue, expenditure policies, investment performance and/or other information that would normally be open in the conduct of institution affairs.

xi. A foundation's enabling documents (e.g., articles of incorporation and bylaws) and any amendments are to be provided to the institution. These documents must include a clause requiring that in the event of the dissolution of a foundation, its assets and records will be distributed to its affiliated institution, provided the affiliated institution is a qualified charitable organization under relevant state and federal income tax laws. To the extent practicable, the foundation shall provide the institution with an advance copy of any proposed amendments, additions, or deletions to its articles of incorporation or bylaws. The institution shall be responsible for providing all of the foregoing documents to the Board.

xii. Foundations may not engage in activities that conflict with federal or state laws, rules and regulations; the policies of the Board; or the role and mission of the institutions. Foundations shall comply with applicable Internal Revenue Code provisions and regulations and all other applicable policies and guidelines.

xiii. Fund-raising campaigns and solicitations of major gifts for the benefit of an institution by its affiliated foundation shall be developed cooperatively between the institution and its affiliated foundation. Before accepting contributions or grants for restricted or designated purposes that may require administration or direct expenditure by an institution, a foundation will obtain the prior approval of the institution chief executive officer or a designee.

xiv. Foundations shall obtain prior approval in writing from the institution chief executive officer or a designee if gifts, grants, or contracts include a financial or contractual obligation binding upon the institution.

xv. Foundations shall make clear to prospective donors that:

1) The foundation is a separate legal and tax entity organized for the purpose of encouraging voluntary, private gifts, trusts, and bequests for the benefit of the institution; and

2) Responsibility for the governance of the foundation, including investment of gifts and endowments, resides in the foundation's governing board.

xvi. Institutions shall ensure that foundation-controlled resources are not used to acquire or develop real estate or to build facilities for the institution's use without prior Board approval. The institution shall notify the Board, at the earliest possible date, of any proposed purchase of real estate for such purposes, and in such event should ensure that the foundation coordinates its efforts with those of the institution. Such notification to the Board may be through the institution's chief executive officer in executive session pursuant to Idaho Code 67-2345 (1) (c).

c. Foundation Operating Agreements

Each institution shall enter into a written operating agreement with each recognized foundation that is affiliated with the institution. Operating agreements must be signed by the chairman or president of the foundation's governing board, and by the institution chief executive officer. The operating agreement must be approved by the Board prior to execution and must be re-submitted to the Board every three (3) years, or as otherwise requested by the Board, for review and re-approval. Foundation operating agreements shall establish the operating relationship between the parties, and shall, at a minimum, address the following topics:

i. Institution Resources and Services.

1) Whether, and how, an institution intends to provide contract administrative and/or support staff services to an affiliated foundation. When it is

determined that best practices call for an institution employee to serve in a capacity that serves both the institution and an affiliated foundation, then the operating agreement must clearly define the authority and responsibilities of this position within the foundation. Notwithstanding, no employee of an institution who functions in a key administrative or policy making capacity (including, but not limited to, any institution vice-president or equivalent position) shall be permitted to have responsibility or authority for foundation policy making, financial oversight, spending authority, investment decisions, or the supervision of foundation employees. The responsibility of this position within the foundation that is performed by an institution employee in a key administrative or policy making capacity shall be limited to the coordination of institution and affiliated foundation fundraising efforts, and the provision of administrative support to foundation fundraising activities.

2) Whether, and how, an institution intends to provide other resources and services to an affiliated foundation, which are permitted to include:

   a) Access to the institution's financial systems to receive, disburse, and account for funds held (with respect to transactions processed through the institution's financial system, the foundation shall comply with the institution's financial and administrative policies and procedures manuals);

   b) Accounting services, to include cash disbursements and receipts, accounts receivable and payable, bank reconciliation, reporting and analysis, auditing, payroll, and budgeting;

   c) Investment, management, insurance, benefits administration, and similar services; and

   d) Development services, encompassing research, information systems, donor records, communications, and special events.

3) Whether the foundation will be permitted to use any of the institution's facilities and/or equipment, and if so, the details of such arrangements.

4) Whether the institution intends to recover its costs incurred for personnel, use of facilities or equipment, or other services provided to the foundation. If so, then payments for such costs shall be made directly to the institution. No payments shall be made directly from a foundation to institution employees in connection with resources or services provided to a foundation pursuant to this policy.

ii. Management and Operation of Foundations.

1) Guidelines for receiving, depositing, disbursing and accounting for all funds, assets, or liabilities of a foundation, including any disbursements/transfers of funds to an institution from an affiliated foundation. Institution officials into whose department or program foundation funds are transferred shall be informed by the foundation of the restrictions, if any, on such funds and shall be responsible both to account for them in accordance with institution policies and procedures, and to notify the foundation on a timely basis regarding the use of such funds.

2) Procedures with respect to foundation expenditures and financial transactions, which must ensure that no person with signature authority shall be an institution employee in a key administrative or policy making capacity (including, but not limited to, an institution vice-president or equivalent position).

3) The liability insurance coverage the foundation will have in effect to cover its operations and the activities of its directors, officers, and employees.

4) Description of the investment policies to be utilized by the foundation, which shall be conducted in accordance with prudent, sound practice to ensure that gift assets are protected and enhanced, and that a reasonable return is achieved, with due regard for the fiduciary responsibilities of the foundation's governing board. Moreover, such investments must be consistent with the terms of the gift instrument.

5) Procedures that will be utilized to ensure that institution and foundation funds are kept separate.

6) Detailed description of the organization structure of the foundation, which addresses conflict of interest in management of funds and any foundation data.

iii. Foundation Relationships with the Institutions

1) The institution's ability to access foundation books and records.

2) The process by which the institution chief executive officer, or designee, shall interact with the foundation's board regarding the proposed annual operating budget and capital expenditure plan prior to approval by the foundation's governing board.

3) Whether, and how, supplemental compensation from the foundation may be made to institutional employees. Any such payments must have prior Board approval, and shall be paid by the foundations to the institutions, which in turn will make payments to the employee in accordance with

normal practice. Employees shall not receive any payments or other benefits directly from the foundations.

iv. Audits and Reporting Requirements.

1) The procedure foundations will utilize for ensuring that regular audits are conducted and reported to the Board. Unless provided for otherwise in the written operating agreement, such audits must be conducted by an independent certified public accountant, who is not a director or officer of the foundation. The independent audit shall be a full scope audit, performed in accordance with generally accepted auditing standards.

2) The procedure foundations will use for reporting to the institution chief executive officer the following items:

a) Regular financial audit report;

b) Annual report of transfers made to the institution, summarized by department;

c) Annual report of unrestricted funds received, and of unrestricted funds available for use in that fiscal year;

d) A list of foundation officers, directors, and employees;

e) A list of institution employees for whom the foundation made payments to the institution for supplemental compensation or any other approved purpose during the fiscal year, and the amount and nature of that payment;

f) A list of all state and federal contracts and grants managed by the foundation; and

g) An annual report of the foundation's major activities;

h)An annual report of each real estate purchase or material capital lease, investment, or financing arrangement entered into during the preceding foundation fiscal year for the benefit of the institution; and

i) An annual report of any actual litigation involving the foundation during its fiscal year, as well as legal counsel used by the foundation for any purpose during such year. This report should also discuss any potential or threatened litigation involving the foundation.

v. Conflict of Interest and Code of Ethics and Conduct.

A description of the foundation's conflict of interest policy approved by the foundation's governing board and applicable to all foundation directors, officers, and staff members, and which shall also include a code of ethics and conduct. Such policy must assure that transactions involving the foundation and the personal or business affairs of a trustee, director, officer, or staff member should be approved in advance by the foundation's governing board. In addition, such policy must provide that directors, officers, and staff members of a foundation disqualify themselves from making, participating, or influencing a decision in which they have or would have a financial interest. Finally, such policy must assure that no director, trustee, officer, or staff member of a foundation shall accept from any source any material gift or gratuity in excess of fifty dollars ($50.00) that is offered, or reasonably appears to be offered, because of the position held with the foundation; nor should an offer of a prohibited gift or gratuity be extended by such an individual on a similar basis.

3. Foundations for Other Agencies

Other agencies under the Board's jurisdiction may establish foundations to accept gifts made for the benefit of the agencies' operating purposes. These agencies are subject to the same policies as the institutional foundations. However, agency foundations with annual revenues less than $100,000 are not required to obtain an independent audit. These agencies must instead submit an annual report to the Board of gifts received and the disposition of such gifts.

4. Idaho Educational Public Broadcasting System Foundations and Friends Groups

Foundations and Friends groups that exist for the benefit of the Idaho Educational Public Broadcasting System (IEPBS) are required by Federal Communications Commission (FCC) regulations to have specific spending authority designated by the Board. Audits of the IEPBS Foundation and Friends groups will be conducted by the State Legislative Auditor.

a. By action of the Board, the Idaho Educational Public Broadcasting System Foundation, Inc., has been designated to accept gifts made for the benefit of public television in the state of Idaho. The Foundation will conduct its activities in a manner consistent with the Federal Communications Commission (FCC) regulations and the FCC license held by the Board.

b. By action of the Board, the Friends of Channel 4, Inc., has been designated to accept gifts made for the Benefit of KAID TV, Channel 4. The Friends of Channel 4, Inc., will conduct its activities in a manner consistent with the Federal Communications Commission (FCC) regulations and the FCC license held by the Board.

c. By action of the Board, the Friends of Channel 10, Inc., has been designated to accept gifts made for the benefit of KISU TV, Channel 10. The Friends of Channel

10, Inc., will conduct its activities in a manner consistent with the Federal Communications Commission (FCC) regulations and the FCC license held by the Board.

d. By action of the Board, the Friends of KUID, Inc., has been designated to accept gifts made for the benefit of KUID TV, Channel 12. The Friends of Channel 12, Inc., will conduct its activities in a manner consistent with the Federal Communications Commission (FCC) regulations and the FCC license held by the Board.

5. Acceptance of Direct Gifts

Notwithstanding the Board's desire to encourage the solicitation and acceptance of gifts through affiliated foundations, the Board may accept donations of gifts, legacies, and devises (hereinafter "gifts") of real and personal property on behalf of the state of Idaho that are made directly to the Board or to an institution or agency under its governance. Gifts worth more than $250,000 must be reported to and approved by the executive director of the Board before such gift may be expended or otherwise used by the institution or agency. Gifts worth more than $500,000 must be approved by the Board. The chief executive officer of any institution or agency is authorized to receive, on behalf of the Board, gifts that do not require prior approval by the executive director or the Board and that are of a routine nature. This provision does not apply to transfers of gifts to an institution or agency from an affiliated foundation (such transfers shall be in accordance with the written operating agreement between the institution or agency and an affiliated foundation, as described more fully herein).

6. Affiliated Research Foundations and Technology Transfer Organization for Institutions of Higher Education

The Board wishes to encourage research and technology transfer and the corresponding economic development potential for the state of Idaho. The Board acknowledges that independent, affiliated foundations operating to support an institution's research and technology transfer efforts can be useful tools to provide institutions with avenues for engagement with the private sector as well as with public and private entities interested in funding research, funding technology transfer and promoting spin-off enterprises arising from institutional intellectual property and technology. Such affiliated foundations should operate substantially within the framework for philanthropic affiliated foundations set out in paragraph 1 and 2 of this policy, with such variances as are reasonable based on the nature of the anticipated function of the specific foundation.

a. The public college and universities may affiliate with non-profit entities which generally meet the criteria set forth in paragraph 2.b. of this policy and which operate for the purpose of supporting the research and technology transfer efforts of one or more of the institutions.

b. Research and Technology Transfer Foundation Operating Agreements. The requirement of a foundation operating agreement under paragraph 2.c. of this policy shall also apply to foundations supporting research and technology transfer. Institutions proposing to affiliate with a particular foundation may propose reasonable variances from specific requirements under paragraph 2.c. based upon the anticipated function of the foundation, provided that any such variances are specifically identified by the institution in materials presented to the Board when requesting approval of the foundation.

Exhibit B

FY 2016 Loaned Employee Agreement Template

AGREEMENT FOR LOANED EMPLOYEE
UNIVERSITY OF IDAHO/UNIVERSITY OF IDAHO FOUNDATION, INC.

THIS AGREEMENT is entered into by and between the UNIVERSITY OF IDAHO, a public corporation, state educational institution, and a body politic and corporate organized and existing under the Constitution and laws of the state of Idaho ("University"), and THE UNIVERSITY OF IDAHO FOUNDATION, INC. a nonprofit corporation ("UIF") and is effective the xx day of June, 2015.

BACKGROUND

A. UIF has asked University to make certain staff members available to fulfill various staffing requirements for UIF's day-to-day operations.

B. University has agreed to loan its employee, Robert Weis ("Loaned Employee"), to UIF to act in the capacity of **Executive Director, University of Idaho Foundation, Inc.** for UIF pursuant to the terms of this Agreement.

AGREEMENT

The parties agree as follows:

1. Relationship between Loaned Employee and University.

a. Status. At all times under this Agreement, Loaned Employee shall be an **exempt, fiscal year** employee of the University subject to all applicable policies and procedures of the Regents and the University. UIF shall have control over all aspects of Loaned Employee's day to day work, and Loaned Employee shall devote 100% of his or her working time to performing services for UIF. Only University may terminate the employment of Loaned Employee. Notwithstanding the foregoing, UIF may discipline the Loaned Employee for cause, which may include taking action up to and including termination of this Agreement, such discipline and determination of cause to be in accordance with UIF policies and procedures and applicable law. The parties acknowledge that University and Loaned Employee have agreed and acknowledged that Loaned Employee's contract with the University is contingent upon continuation of this Agreement and in the event this Agreement is terminated Loaned Employee's contract with the University will also terminate. Loaned Employee will be considered a loaned employee under the worker's compensation law of the state of Idaho.

b. Compensation. University shall pay Loaned Employee a fiscal year salary rate of **$ 000** payable on the regular bi-weekly paydays of the University, and subject to adjustment in accordance with the University's regular policies and procedures. Loaned Employee will be entitled to University benefits to the same extent and on the same terms as other full-time University employees of her/his classification. UIF shall pay University for this cost as provided in Section 3 below.

c. Travel Expenses. University shall reimburse directly to Loaned Employee costs incurred for UIF travel that is approved in advance by the UIF or the University. UIF shall pay University for this cost as provided in Section 3 below.

d. No Prohibition on Leasing Employee to UIF. University represents and warrants to UIF that there is no agreement with Loaned Employee nor any University policy or procedure (including, without limitation, any agreement, policy, or rule of the Idaho State Board of Education, the Regents or the University) that prohibits the University from leasing Loaned Employee to UIF pursuant to the terms of this Agreement. University further represents and warrants that Loaned Employee is eligible for benefits as a full-time leased employee under the term of all applicable University benefit plans. University shall indemnify, defend, and hold UIF harmless from any breach of the foregoing representations.

2. Relationship between UIF and Loaned Employee.

a. Supervision. Loaned Employee will work full time under the supervision and direction of the UIF Board of Directors. Loaned Employee will report directly to UIF President or her/his designee, who shall determine her/his duties to perform work for UIF.

b. Performance Evaluations. UIF will evaluate the performance of Loaned Employee on an annual basis at a time consistent with the annual reviews of exempt employees at the University. UIF will provide University with a copy of any written documentation regarding the evaluation within fourteen (14) days after the evaluation is complete.

3. Relationship between UIF and University.

a. Lease of Loaned Employee. During the term of this Agreement, so long as Loaned Employee is employed by University, University shall make available to UIF the full time services of Loaned Employee, subject to University's continued employment of Loaned Employee. The furnishing of Loaned Employee shall not be considered a professional service of the University to UIF, nor shall University be considered a contractor of UIF.

b. University to Provide Salary and Benefits. As indicated above, University shall provide Loaned Employee with a fiscal year salary rate of **$000** and other University benefits to the same extent and on the same terms as other full-time University employees of her/his classification. University shall be responsible for all facets of payroll and benefits administration with respect to Loaned Employee, including, without limitation, withholding and payment of payroll taxes, unemployment compensation, worker's compensation coverage, social security, and providing any fringe and welfare benefit programs for Loaned Employee. University shall indemnify, defend, and hold UIF harmless for the payment of all items set forth in this Section 3(b) and any claims or losses resulting from the administration of any employee benefits pursuant to any applicable law, including without limitation the Fair Labor Standards Act, the Employee Retirement Income Security Act, and the Internal Revenue Code.

c. Reimbursement of Salary and Benefits by UIF. UIF will reimburse University for one hundred percent (100%) of the University's total cost of Loaned Employee's salary and benefits and any reimbursable costs such as travel expenses. Such costs will be billed annually and paid to the University in one annual installment. University shall maintain accurate books and account records reflecting the actual cost of all items of direct cost for which payment is sought under this Agreement. At all reasonable times, UIF shall have the right to inspect and copy said books and records, which the University agrees to retain for a minimum period of five (5) years following the termination of this Agreement.

d. Review of Loaned Employee's Status/Discipline/Termination for Cause. Loaned Employee shall at all times remain an employee of University. Accordingly, University shall have the power to evaluate, discipline, and terminate Loaned Employee in its discretion and in accordance with any of its policies, procedures, or agreements between University and Employee. As provided above, UIF will conduct an annual review of Loaned Employee. UIF will provide a copy of any documents related to its evaluation to the University no later than fourteen (14) days after the evaluation is completed. Based on its annual review of Loaned Employee's performance or any interim review or concerns regarding Loaned Employee's performance, UIF may discipline the Loaned Employee for cause, which may include taking action up to and including termination of this Agreement, such discipline and determination of cause to be in accordance with UIF policies and procedures and applicable law. If UIF makes such a determination, UIF shall provide notice to the University that it will no longer lease the services of Loaned Employee effective as of the date specified in the notice with a reasonable amount of detail as to the reason UIF is discontinuing the services of Loaned Employee.

e. Indemnification by UIF for Acts of Loaned Employee. University shall have no liability to UIF for loss or damage directly resulting from the fault, negligence, misconduct, or other acts of the Loaned Employee while Loaned Employee is performing activities on behalf of or at the direction of UIF. UIF therefore agrees to release, defend, indemnify and hold harmless the state of Idaho, University, its governing board, officers, employees, and agents, from and against any and all claims, demands, losses, damages, costs, expenses, and liabilities, for injuries (including death) to persons and for damages to property (including damage to property of UIF or others) arising out of or in connection with the activities of the Loaned Employee performed on behalf of or at the direction of UIF. Notwithstanding the foregoing, both parties may maintain any liability insurance coverage as it shall deem appropriate with respect to liabilities arising out of the acts or omissions of Loaned Employee.

f. Compliance With Employment Discrimination Laws.

1) UIF agrees to comply with all laws regarding employment discrimination, including, without limitation, the Americans with Disabilities Act, Age Discrimination in Employment Act, Title VII of the Civil Rights Act, the Equal Pay Act, and the Idaho Human Rights Act with respect to Loaned Employee as if Loaned Employee were an employee of UIF. UIF shall notify University within five (5) days of any claim by Loaned Employee alleging a violation of any laws relating to employment discrimination. UIF shall indemnify, defend, and hold University

harmless from any claims or losses resulting from UIF's failure to company with any applicable employment discrimination laws.

2) University agrees to comply with all laws regarding employment discrimination, including, without limitation, the Americans with Disabilities Act, Age Discrimination in Employment Act, Title VII of the Civil Rights Act, the Equal Pay Act, and the Idaho Human Rights Act with respect to Loaned Employee. University shall notify UIF within five (5) days of any claim by Loaned Employee alleging a violation of any laws relating to employment discrimination. University shall indemnify, defend, and hold UIF harmless from any claims or losses resulting from University's failure to comply with any applicable employment discrimination laws.

4. General Terms

a. Term, Termination. The term that University shall lease Loaned Employee to UIF shall extend to **June xx, 2016**, which is the term of employment specified in Loaned Employee's contract as an exempt employee of the University, unless it is terminated earlier upon the occurrence of any of the following:

1) Notice to University Due to Loaned Employee Performance Problems. Pursuant to Section 3(d) above, UIF may discipline Loaned Employee by taking action up to and including termination of this Agreement for cause based on its annual review of Loaned Employee's performance or any interim review or concerns regarding Loaned Employee's performance. If UIF makes such a determination, UIF shall provide notice to the University that it will no longer lease the services of Loaned Employee effective as of the date specified in the notice with a reasonable amount of detail as to the reason UIF is discontinuing the services of Loaned Employee.

2) Termination in the Event of Default. Either party may terminate the lease of Loaned Employee by University to UIF upon the material default of the other's performance provided that the non-defaulting party first provides the other with at least ten (10) days' notice of the default and an opportunity to cure such default within the notice period.

3) Discontinued Employment of Loaned Employee by University. The lease of Loaned Employee to UIF shall automatically terminate if Loaned Employee is no longer an employee of University for any reason.

The parties may extend the term of this Agreement at any time upon mutual agreement for a new term that is equal to the term of the Loaned Employee's renewed contract with the University. The UIF is under no obligation to extend the term of this Agreement for a new term, however, (in order to be consistent with University polices which call for at least 60 days' notice if the University will not renew the Loaned Employee's employment agreement) in the event the UIF determines that it will not agree to an extension of the term of this Agreement the UIF will give University notice of its intention not to extend the term of this Agreement at least 60 days prior to the expiration of the term of this Agreement. Failure to give the notice required hereunder shall NOT effect a renewal of the term of this Agreement, rather it will only extend the term of this Agreement long enough for 60 days' notice to be given.

b. No Third Party Beneficiaries**.** The parties acknowledge that there are no intended third party beneficiaries of this Agreement. Without limiting the foregoing, this Agreement shall not be construed as a promise of continuing employment to Loaned Employee, who remains subject to all applicable Regents and University policies, including but not limited to policies regarding nonrenewal of fixed term appointments and termination or discipline.

c. Governing Law. This Agreement will be governed by the laws of the state of Idaho as an agreement to be performed within the state of Idaho. The venue for any legal action under this Agreement shall be in Latah County.

d. Notice. 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:

To UIF:
University of Idaho Foundation, Inc. — Phone: (208) 885-4000
Chairman — Fax: (208) 885-4040
875 Perimeter Drive MS 3413
Moscow, ID 83843-3413

To the University:
University of Idaho — Phone: (208) 885-6365
Office of the President — Fax: (208) 885-6558
P.O. Box 443151
Moscow, ID 83844-3151

Notice shall be deemed given on its date of mailing, faxing, or upon written acknowledgment of its receipt by personal delivery, whichever shall be earlier.

e. Waiver. Waiver by either party of any breach of any term, covenant or condition herein contained shall not be deemed to be a waiver of such term, covenant or condition, or any subsequent breach of the same or any other term, covenant or condition herein contained.

f. Attorney's Fees. In the event an action is brought to enforce any of the terms, covenants or conditions of this Agreement, or in the event this Agreement is placed with an attorney for collection or enforcement, the successful party to such an action or collection shall be entitled to recover from the losing party a reasonable attorney's fee, together with such other costs as may be authorized by law.

g. Assignment. Neither party shall assign this Agreement without the prior written consent of the other.

h. Amendments. This Agreement may not be modified or amended except by an agreement in writing signed by both of the parties.

i. Acknowledgment by Employee. This Agreement shall not be effective until it is executed by University and UIF and acknowledged by Loaned Employee pursuant to the signature blocks below.

Signature page follows.

The parties have executed this Agreement effective as of the date set forth above.

UNIVERSITY OF IDAHO	UNIVERSITY OF IDAHO FOUNDATION, INC.
______________________________	______________________________
Chuck Staben, President	Richard Allen, Chairman

Acknowledgment by Loaned Employee:

Loaned Employee, by his or her signature below, acknowledges the terms of this Agreement between University and UIF and agrees that he or she is an employee of the University that is loaned to UIF pursuant to the terms of this Agreement. Loaned Employee further acknowledges that he or she is a 'loaned employee' pursuant to all state workman's compensation laws. Accordingly, Loaned Employee acknowledges and agrees that in the event of any work-related injury that is covered by workman's compensation insurance held for the benefit of Loaned Employee by University, Loaned Employee will be precluded from recovering damages from UIF for such injury in accordance with applicable state workman's compensation laws.

____

Name: Insert

Exhibit C

2011-0321 Signed Service Agreement

UNIVERSITY OF IDAHO AND UNIVERSITY OF IDAHO FOUNDATION, INC.

SERVICE AGREEMENT

This Service Agreement ("Agreement") made this 21st day of March, 2011 between the University of Idaho ("University") and the University of Idaho Foundation, Inc., an Idaho nonprofit corporation ("Foundation").

RECITALS

A. The University and the Foundation are parties to that certain Operating Agreement dated August 31, 2009 (the "Operating Agreement.")

B. The Operating Agreement states that the University will provide certain services to the Foundation pursuant to the terms of this Agreement.

AGREEMENT

In consideration of the mutual commitments contained herein, and for good and valuable consideration, the receipt and sufficiency of which is hereby acknowledged, the Parties agree as follows:

I. <u>UNIVERSITY OBLIGATIONS TO PROVIDE SERVICES/FACILITIES TO FOUNDATION</u>

A. <u>Office Space and Furnishings</u>. The University grants to the Foundation continued permission to use current office space located in Moscow, Idaho at Mary Forney Hall and in the Boise GAR building located at 714 W. State Street, Boise, Idaho, and the office furnishings, equipment, computers and telephone systems at such locations, as well as such additional space, furnishings and equipment as may be determined by the parties from time to time to be relevant and necessary to the business and purpose of the Foundation. The University agrees to provide utilities, custodial services, building and grounds maintenance and repairs, and property insurance on said office space in the same fashion as provided for similar University facilities and equipment.

B. <u>Technology Support</u>. The University will provide the Foundation with access to the Banner administrative computing system and other computer systems, and access to such University information as is relevant and necessary to the business and purpose of the Foundation. The University will provide the Foundation with technology support for the computing systems and the computers and other technology equipment provided the Foundation, all in the same fashion as provided for similar University operations.

C. <u>Operational Services</u>. The University will provide the Foundation with access to certain operational University services, including human resources, accounts payable, payroll, printing and design, campus mail, purchasing services, and related services as are relevant and necessary to the business and purpose of the Foundation, all in the same fashion as provided for similar University operations.

D. Constituent Records. On a regular basis, the University will transfer to the Foundation, or make available through the University electronic data systems, such data and constituent records, to include demographic and relationship data, as is necessary for the Foundation in carrying out its mission. The University shall retain for its own purposes data and records needed to fulfill its mission.

E. Access to Information. In connection with carrying out the University's obligations set forth above, the Foundation will provide the following information to University employees who are approved by the University President, a Vice President, or a Dean and have signed the Foundation's Confidentiality Policy attached as Exhibit A:

1. Access to and reports from the Foundation's donor records; and,

2. Financial information about the status of donor funds and fund raising projects.

F. Additional Staff Services. In addition to employees who are loaned to the Foundation by the University pursuant to the terms of any written loaned employee agreements, the University will provide staffing services as agreed to by the parties and requested by the Foundation.

The University and the Foundation acknowledge that they are in a transition period in implementing separate University and Foundation operations under the policies of the State Board of Education and Board of Regents of the University of Idaho. During the term of this Agreement, the Parties will continue to examine the efficacy of the operations under the structure set out in this Agreement and determine needed changes, including possible loaning of additional employees of the University to the Foundation to perform some or all of the service functions to be performed by University personnel hereunder. If any or all of these employees shall become loaned employees of the University to the Foundation, the Foundation shall reimburse the University pursuant to the terms of the applicable loaned employee agreement. The other employees shall at all times remain the employees of the University, and not the Foundation, and the University shall have the sole and exclusive control over the terms and status of their employment.

G. Accounting of Foundation Expenses. The University will maintain a set of accounts in its financial system to facilitate payroll, travel, purchasing card transactions, and internal campus charges for the Foundation to be fully reimbursed by the Foundation no less often than annually with only minimal balances at June 30 each year.

II. FOUNDATION OBLIGATIONS TO PROVIDE SERVICES/FACILITIES TO UNIVERSITY

A. The Foundation will provide asset management and investment services to the University to optimize resources available to the University from private gifts and endowments managed by the Foundation. The Foundation will be paid by a series of mechanisms which have been agreed upon by the University and the Foundation as outlined in the Gift Assessment and Fees Policy adopted by the Foundation on May 1, 2007.

B. The Foundation may provide to the University additional support for fundraising activities or other initiatives as requested by the University President.

III. PAYMENT BY FOUNDATION TO UNIVERSITY. In consideration of the services and facilities provided by the University to the Foundation pursuant to this Agreement, the Foundation shall pay the following:

A. Fiscal Year 2011: For the University's fiscal year 2011 the parties have negotiated an acceptable budget for office space and furnishings (I.A. above), technology support (I.B. above), operational services (I.C. above) and additional staff services (I.F. above) in the total amount of $289,494.

B. Fiscal Year 2012 and beyond: Prior to the end of fiscal year 2011, the parties will agree upon a budget for fiscal year 2012 for the items described in III. A. above, based on the operational results of fiscal year 2011 and the anticipated needs of the Foundation for fiscal year 2012. This budget will be reduced to writing and set out the amounts and timing for payment of the budgeted amounts by the Foundation to the University. This process will be repeated for each ensuing fiscal year during the term of this Agreement. In the event the parties are unable to agree upon a budget for any fiscal year, the budget will be resolved using the dispute resolution procedure under the Operating Agreement (Article VIII Section C. thereof).

C. Compensation for employees loaned to the Foundation: Shall be as set forth in the terms of any loaned employee agreement between the parties.

IV. RELATIONSHIP OF PARTIES/CONFIDENTIALITY

A. Separate Status. In making this Agreement, the parties acknowledge that they are separate and distinct operating entities. The University is a state university, governed by the Regents of the University of Idaho. The Foundation is a nonprofit corporation, governed by its Board of Directors, and recognized as a tax-exempt entity under Section 501(c)(3) of the Internal Revenue Code. The Foundation's mission includes the management and distribution of private support to enhance the growth and development of the University. At all times and for all purposes of this Agreement, the University and the Foundation shall each act in an independent capacity and not as an agent or representative of the other.

B. Confidentiality. All obligations under this Agreement shall be carried out in accordance with the following: Pursuant to the terms of the Operating Agreement, the University hereby agrees to the terms of the Foundation's Confidentiality Policy and shall instruct its agents and employees that all confidential information of the Foundation shall be protected from disclosure. Except as specifically authorized under the Operating

Agreement or the Confidentiality Policy, the University's access to any Foundation information shall not include any donor specific data of the Foundation such that would provide individually identifiable information about donors or their donations to the Foundation. The Foundation's donor database and all other data, materials and information of the Foundation and the University pertaining to past, current or prospective donors, are proprietary to the Foundation and the University respectively and constitute confidential information and trade secrets. The Foundation and University shall take the steps necessary to monitor and control access to the donor database and to protect the security of computer servers and software relevant to the database, in each case to the extent that these systems are in their respective control.

V. MISCELLANEOUS

A. Changes, additions, amendments, or modifications to this Agreement must be agreed to by both parties in writing prior to implementation.

B. The term of this Agreement shall begin on the date hereof and shall continue thereafter with the following exceptions:

1. In the event either party serves notice to the other in writing of its decision to terminate the provisions of this Service Agreement, this Agreement shall terminate no later than 90 (ninety) days from the date of notice.

2. In the event the Operating Agreement dated August 31, 2009, between the parties terminates, this Service Agreement will terminate on the same date.

C. Upon termination of the provisions of this Agreement, all rights and obligations hereunder shall forthwith terminate, except for rights and obligations accrued prior to termination in respect of payment for support.

D. In the event of any conflict between the terms of this Agreement and the Operating Agreement, the terms of the Operating Agreement shall be controlling, and the terms of this Agreement shall be interpreted to comply with the Operating Agreement.

E. Any disputes arising under this Agreement shall be resolved in accordance with Article VIII, Section C of the Operating Agreement.

F. The University and the Foundation each agree to indemnify, defend and hold the other party, their officers, directors, agents and employees harmless from and against any and all losses, liabilities, and claims, including reasonable attorney's fees arising out of or resulting from the willful act, fault, omission, or negligence of the party, its employees, contractors, or agents in performing its obligations under this Agreement. This indemnification shall include, but not be limited to, any and all claims arising from an employee of one party who is working for the benefit of the other party. Nothing in this Agreement shall be construed to extend to the University's liability beyond the limits of the Idaho Tort Claims Act, Idaho Code Sections 6-901 et seq.

IN WITNESS WHEREOF, the Parties have caused this Agreement to be executed by their duly authorized officers as of the date first above written.

UNIVERSITY:

M. Duane Nellis

President
University of Idaho

Date: March 21, 2011

FOUNDATION:

J. L. Stoddard

Jeffry L. Stoddard, Chairman
University of Idaho Foundation, Inc.

Date: 3/9/11

Nancy C. McDaniel

Nancy McDaniel, Executive Director
University of Idaho Foundation, Inc.

Date: 3/9/11

EXHIBIT A

University of Idaho Foundation, Inc.

Confidentiality Policy
April 30, 2010

The University of Idaho Foundation, Inc., an Idaho nonprofit corporation (the Foundation), owns certain confidential and proprietary information. This information includes, without limitation, the following:

1. Certain biographic and gift/pledge information concerning past, current, and prospective donors, alumni, and friends of the Foundation, including without limitation their identities, donor histories, personal or corporate financial information, salaries and other income, family information, asset holdings, and any other personal information;
2. Business plans, fund-raising plans, development plans;
3. Information concerning Foundation employees (including employees that are loaned from the University), such as work history, compensation, and personnel files;
4. Financial information concerning the Foundation's business, including cost information, pricing, profits, accounting information, investment returns; and
5. Formulas, patterns, compilations, programs, computer programs, devices, methods, techniques, or processes used by the Foundation.

These records are the proprietary and confidential information of the Foundation. They are also the "trade secrets" of the Foundation as defined by applicable trade secret laws. The information in these records has significant economic value to the Foundation and would have value to third parties if known to them. In addition, confidentiality is often a factor in a donor's decision to make a gift to the Foundation. These records may exist in either or both written or electronic form.

These records, which contain highly sensitive information, may be maintained from time to time on the University's alumni/donor database (BANNER) and accounting database (BANNER) or in other forms and locations owned or controlled by the Foundation.

Please note that because it is a private entity, the Foundation is not subject to state public records and public meetings laws which may apply to the University of Idaho.

The Foundation requires its employees, loaned employees, volunteers, and others accessing the Foundation's information to keep it confidential. As an authorized recipient of the Foundation's confidential information defined above, the Foundation requires your compliance with the Foundation's Policy on Confidentiality which is as follows:

1. You will keep the data confidential at all times, regardless of whether you are a current or former employee or other agent of the Foundation and/or the University.
2. You will use the data only for legitimate Foundation business for which you are explicitly authorized.
3. You will not exhibit or divulge the contents for any record (written or electronic) to any person except in the conduct of your work assignment.
4. You will not erase or modify a data record or data entry from any record, report or file except in the performance of your assigned duties.
5. You will report security and privacy violations.

6. You understand that BANNER's user ID's and associated passwords are highly confidential and are not to be shared, communicated, or made accessible to anyone.
7. Any requests by the media for donor information or any other information concerning the Foundation should be forwarded to the Foundation's Executive Director immediately upon receipt.
8. Sensitive information such as a donor's will, trust instrument, or financial information should not be copied or provided to University personnel unless authorized by the donor. To the extent possible, such information should be maintained as a single copy in the files at the Foundation Financial Office.
9. When assisting in the completion of a gift agreement to be signed by a donor, staff should be mindful of the sensitive nature of the information. Personnel should not provide tax, legal or accounting advice to donors.

By signing your name below, you acknowledge receipt of this policy and agree to comply with the terms for use outlined within.

Signature:____________________________Date:_________Department:________

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Exhibit D

2016-03-16 UIF Investment Policy

Policy: Investment

Section: Investment

Number: 1

Recording Date: First Adopted November 18, 1995, Amended March 8, 1996, October 25, 1997, March 13, 1998, September 30, 2000, April 20, 2001, October 17, 2003, September 16, 2005, January 25, 2008, May 31, 2013, September 12, 2014, March 11, 2016

Committee: Investment Committee

BACKGROUND:

On September 17, 1970, The University of Idaho Foundation, Inc. (Foundation) was incorporated under the laws of the State of Idaho as a non-profit organization exempt from Federal tax under section 501(c)(3) of the Internal Revenue Code. The Foundation is governed by a Board of Directors. The Foundation's sole purpose is to support the University of Idaho (University) by the means at its disposal with an emphasis on soliciting financial support for the University and managing and investing the securities, monies and real and personal property it receives from such sources, and to expend its resources, beyond that required to cover the costs of its operation, to and for the benefit of the University.

The University is governed by the Regents of The University of Idaho (Regents) and is a constitutional corporation organized and existing under and by virtue of the Constitution of the State of Idaho. The University is exempt from Federal income tax under section 501(c)(3) of the Internal Revenue Code, as an educational organization.

The Consolidated Investment Trust (CIT) was established by the Regents in July 1959, when the assets of 25 individual endowments having a combined market value of $441,460 were pooled for investment purposes only and in return were issued unit participation shares in an investment account called the CIT. The purpose for creating the CIT was to provide a well-managed, diversified investment vehicle owned entirely by endowments.

Effective July 1, 1975, the Regents transferred the assets of the CIT to the Foundation. Upon accepting the CIT, the Foundation Board of Directors established an Investment Committee and charged it with the responsibility of monitoring and guiding the CIT's investment policy.

Article I. University of Idaho Foundation, Inc. Investment Policy

INTRODUCTION: The Foundation Investment Committee developed this policy through careful study and consideration of the returns and risks associated with alternative investment strategies in relation to the current and projected income needs of University and Foundation activities which are supported by the endowments. The policy provides a structure within which the funds may be managed to achieve the long term investment and financial objectives of all pooled endowment funds. The Foundation is committed to ensuring the assets of the pooled endowment funds are fully diversified and are managed efficiently and prudently by qualified investment personnel.

Because of the perpetual nature of endowments, decisions with regard to investment management and performance of all pooled endowment funds must focus on longer-term goals and objectives which safeguard the purchasing power of the endowment principal and provide a relatively predictable and growing stream of annual distributions which support the education, research, and service missions of the University.

OBJECTIVES: The specific objectives of all pooled endowment fund investments are to:

1. Provide a regular and reliable source of funding to meet the goals and objectives of the endowments which own pooled endowment fund unit participation shares,

2. target a longer-term asset allocation that should reasonably provide an expected total rate of return of five percent (5%) greater than the rate of inflation as measured by the Consumer Price Index (CPI), net of fees, with a targeted annualized standard deviation similar to a simple blend of 70% global stocks (MSCI All Country World Index, net)/30% Bonds (Barclays Aggregate) portfolio.

3. Maintain or increase the purchasing power of the corpus after withdrawals are taken, and

4. Keep in perspective the longer-term (ten years or longer) investment objectives when evaluating interim fluctuations. It is recognized that the 5.0% real return objective is challenging and may be difficult to attain in every ten-year period, but the Fund will seek to achieve the objective over a series of ten-year periods. It is also recognized that given the static nature of this objective, it is not directly related to market performance; this reinforces the view that success or failure in achieving this objective should be evaluated in the context of the prevailing market environment and over the long term.

SPENDING POLICY: An endowment spending policy determines how the endowment payout amount will be calculated, including how much of the total return will be distributed to support the purposes of the endowment and how much will be reinvested. It is the intent of the Investment Committee to achieve a balance between the endowment growth objectives and stability in distribution. The Investment Committee will review spending assumptions annually for the purpose of determining changes, if any, may consider past spending and asset allocation into its current spending decision. The current spending policy is attached hereto as Appendix A.

ASSET ALLOCATION POLICY: The Committee recognizes that the strategic allocation of Portfolio assets across broadly defined financial categories and subcategories with varying degrees of risk, return, and return correlation will be the most significant determinant of long-term investment returns and Portfolio asset value stability.

1. The Committee expects that actual returns and return volatility will vary from expectations and return objectives across shorter periods of time. The Investment Committee retains flexibility to make periodic changes to the asset allocation. At least annually the Investment Committee will review the target allocations and allowable ranges. The Investment Committee expects to make major changes only in the event of material changes to the CIT, to the assumptions underlying CIT spending policies, and/or to the capital markets and asset classes in which the Portfolio invests.

2. The asset allocation will start with four major categories: 1) Equity (including public equity and private investments), 2) Debt, 3) Alternatives (e.g., commodities or hedge funds) and 4) Cash. The expected role of equity and alternative investments will be to reflect the longer-term real growth of Portfolio assets, while the role of debt and cash investments will be to reduce volatility at the total portfolio level, and provide relatively stable or appreciating asset values to support near-term liquidity needs in the event of sudden or protracted declines in equity and alternative investments.

The longer-term strategic asset allocation guidelines will be determined by the Investment Committee including: 1) the selection of asset categories, i.e., domestic and international debt and equity, real estate, private equity, other alternative investments and cash and/or cash equivalents; and 2) the target allocation percentage of the total portfolio and an allowable range for each asset category. Once the asset allocation has been determined by the Investment Committee, the selection of individual investments within each class is the responsibility of the investment managers. The asset allocation will be reviewed at least annually by the Investment Committee and reported to the Foundation Board. The current asset allocation policy is attached hereto as Appendix B.

Article II. Investment Management

Foundation Board of Directors: With regard to investment policy, the board is responsible for establishing the duties of the Investment Committee and for approving investment policies based on recommendations by the Investment Committee.

Investment Committee: The Investment Committee is responsible for managing the investment process in a fiscally responsible and prudent manner while implementing strategies designed to achieve the investment objectives listed above. The Investment Committee shall establish strategies to implement the approved Investment Policy including selection of acceptable asset classes, definition of target allocations and allowable ranges in each asset class and by individual investment managers and investment performance expectations.

The Investment Committee is a standing committee of the Foundation. It generally meets three or four times a year with the staff from the University of Idaho Foundation, Inc. Membership of the Investment Committee shall be structured to assure investment acumen, continuity and opportunities for service.

The Investment Committee shall consist of a minimum of seven voting members including the Chairman and Vice Chairman of the Foundation. The Director of Finance of the Foundation, the Executive Director of the Foundation, and a University of Idaho College Dean shall be included as non-voting members. Additional committee members shall be appointed by the Foundation's Chairman and approved by the Foundation Board of Directors. The chairman of the committee shall be appointed by the Foundation's Chairman and approved by the Foundation Board of Directors.

The primary responsibility of the Investment Committee is to oversee and provide guidance for the investment of Foundation assets. Its major responsibilities are:

1. Recommending investment goals and objectives to the Board of Directors.
2. Establishing investment policy (asset allocation, spending policy, and level of risk).
3. Selecting and hiring investment managers and reviewing their performance.
4. Establishing performance measurement criteria for investment managers and the overall portfolio.
5. Terminating investment managers.
6. Selecting, hiring and terminating investment advisory consultants.

The Chair of the Investment Committee may periodically convene Subcommittee calls in advance of full Committee meetings to set agenda priorities and vet investment advisor recommendations before they are presented to the full Committee at regular meetings. Subcommittee meetings can also be called to review major market and portfolio changes between Committee meetings, as appropriate.

The University of Idaho Foundation, Inc. office is responsible for the day-to-day stewardship of all funds and/or finances of the Foundation.

The Foundation has the responsibility to comply with: applicable state and federal laws and regulations; donor requirement; Regents' regulations and requirements; University of Idaho policies and procedures; generally accepted accounting and financial management principles; the Foundation's Articles of Incorporation and the Foundation's by-laws.

Specifically with regard to the investment responsibilities, the Foundation's Director of Finance will oversee the administration and support of those functions essential to sound financial management of all Foundation funds, including pooled endowment funds, such as fiscal planning, budgeting, receipting and disbursing of funds, and investing/managing assets to include custodial and accounting functions. Further, the Investment Subcommittee delegates authority to the Director of Finance, without a Committee vote, for rebalancing transactions among existing CIT managers, as follows:

1. Should market movements cause any asset class to fall outside the allowable range listed in the Asset Allocation Policy (Appendix B) as of any quarter-end, the Director of Finance shall instruct the Foundation's Financial team to implement such rebalancing transactions among existing CIT managers to bring said asset class back into compliance with the allowable range within one month following quarter-end.

2. New contributions to the CIT should be applied to, and payments by the CIT withdrawn from, asset classes in such a way as to bring the CIT asset allocation closer to the policy targets set forth in Appendix B. Sourcing of cash for spending distributions may be effected by either foregoing the reinvestment of interest/dividends or by partial redemptions from funds.

3. No advance written notice to the Committee shall be required for the rebalancing transactions enumerated above, but the Foundation's Financial team shall report such rebalancing transactions to the Committee on at least a quarterly basis.

4. The Committee reserves the right to amend this protocol or rescind this authority delegated to the Director of Finance at any time for any reason.

The Foundation Board of Directors shall authorize specific individual(s) to endorse securities/stock or bond powers for sale, transfer, merger or other lawful purposes and to open or close brokerage accounts and accounts with commercial banks, as necessary to implement investment decisions and transact business in the name of and on behalf of the Foundation.

The Foundation's Financial team will, under the direction of the Investment Committee, provide and/or arrange for the following services: implementing manager transactions approved by the Investment Committee in an expeditious manner; conducting selection processes for investment management; review, assess, and present to the Investment Committee information about investment performance; analyze and present discussion agendas regarding modifications to the investment policy, especially the asset allocation policy and spending policy; negotiate the management fee structure; and provide desired accounting and reporting to the Investment Committee and Foundation Board of Directors.

Investment Managers: The pooled endowment funds will be managed by qualified investment management personnel/investment management organizations. The investment managers have discretion, within the guidelines set forth in this investment policy statement and any additional guidelines provided each manager, to manage the assets in each portfolio to best achieve the investment objectives established by the Investment Committee. The investment managers shall be responsible for implementing security selection and the timing of purchases and sales within the customized investment guidelines set forth in their Investment Management Agreement or Fund Documents.

Investment Managers – General Guidelines: These guidelines shall apply to all investments and investment managers, unless addressed otherwise by the Investment Committee in Investment Management Agreement (IMA) or Fund Documents.

1. All managers shall have discretion to invest in cash reserves; however, managers will be evaluated on total funds investment performance.

2. Mutual funds and other pooled asset portfolios are acceptable investment vehicles provided they conform to all other requirements and restrictions.

3. Public equity holdings shall be limited to readily marketable securities of corporations that are constituents of the MSCI All Country World Investable Market Index. Preferred and convertible preferred stocks may be held as allowed in the respective IMA or Fund prospectus. Publicly traded Real Estate Investment Trust (REIT) shares may be held and are considered part of the allocation to stocks.

4. Equity and debt managers holding non-U.S. dollar denominated securities are permitted to employ currency hedging strategies.

5. Debt investments shall be marketable securities which may include, but not necessarily be limited to U.S. Treasury, federal agencies and U.S. Government guaranteed obligations, sovereign debt, and domestic and foreign corporate issues, mortgage pass-through and collateralized debt obligations (ABS). The average overall rating of the debt investments will be at least "Baa/BBB" as measured by a nationally recognized rating agency. In cases where the yield spread adequately compensates for additional risk, Baa or BBB and below and non-rated securities may be purchased. However, no more than 30% of the holdings shall be in securities whose credit rating is less than Baa- or BBB-.

6. Cash equivalent reserves shall consist of cash instruments having a quality rating by at least one rating agency of A-2, P-2 or higher, maturing in 360 days or less.

7. Financial options and futures, currency forwards and contracts and other derivative securities may be employed in defensive and hedge strategies undertaken to preserve principal.

8. Unless specifically authorized in the IMA or Fund documents an investment manager shall not use derivatives to increase portfolio risk above the level that could be achieved in the portfolio using only traditional investment securities. Moreover, an investment manager will not use derivatives to acquire exposure to changes in the value of assets or indexes that, by themselves, would not be purchased for the portfolio.

DIVERSIFICATION: Diversification across and between assets classes is the primary means the Investment Committee expects to create an investment portfolio that can withstand the expected capital market volatility. Consistent with the desire for reduced volatility, the diversification policy is based on the assumption that the volatility of the combined equity portfolios will be similar to that of the overall equity market. Debt portfolio durations may vary from the larger debt market as the Investment Committee makes the determination to increase or reduce the level of interest rate exposure. Consequently, the total portfolio will be constructed and maintained to provide prudent diversification with regard to the concentration of holding in individual issue, investment manager and asset class as outlined in the following guidelines.

1. Not more than 5% of the total equity portfolio valued at market may be invested in the common stock of any one corporation.

2. Debt securities of any one issuer shall not exceed 5% of the market value of the total bond portfolio at the time of the purchase (except U.S. Treasury or other federal agency issues).

3. With the exception of passively managed portfolios, not more than 20% of the total portfolio may be invested in any one investment fund or pool.

4. With the exception of passively managed portfolios, not more than 30% of the total portfolio may be invested with any one investment manager regardless of the number of funds with that manager.

Voting of Proxies: The Investment Managers shall vote shareholder proxy ballots.
Execution of Security Trades: The Investment Committee expects the purchase and sale of securities by investment managers to be made in a manner designed to receive the combination of best price and execution.

Article III. Monitoring and Evaluation:

Overall Portfolio: This will entail a review of the investment objectives. Investment performance will be reviewed annually to determine the continued feasibility of achieving the investment objectives and the appropriateness of the investment policy for achieving these objectives.

It is not expected that the investment policy will change frequently. In particular, short-term changes in the financial markets should not require any adjustment in the investment policy.

Managers: The Foundation’s Director of Finance will provide monthly investment activity reports to the Investment Committee, including a breakdown by each investment manager. The Investment Committee shall meet on a periodic basis with the Foundation’s investment advisory consultant (if applicable) and Foundation staff to review total assets and individual manager performance. Performance reviews will focus on:

1. Comparison of managers’ results to funds using similar policies (in terms of diversification, volatility, style, etc.).

2. Adherence to asset allocation and diversification policy guidelines.

3. Material changes in the manager organizations, such as investment philosophy, personnel changes, acquisitions or losses of major accounts, etc.

4. Evaluation of manager, asset class and portfolio performance on a three-, five- and ten-year investment horizon (along with monitoring of performance for quarterly and annual periods).

5. Evaluate performance relative to an appropriate performance benchmark that reflects the investment objective of each investment portfolio.

Performance Expectations: The most important performance expectation is the achievement of long-term investment results that are consistent with this Investment Policy Statement. The CIT will be compared to a blended benchmark that represents the target asset classes. The CIT is expected to meet or exceed the passive policy benchmark over a majority of rolling three, five and ten-year horizons. Implementation of the policy will be directed toward achieving this return and not toward maximizing return without considering the risk.

Article IV. ACCOUNTING AND REPORTING

In addition to retaining competent investment managers, essential elements of a successful portfolio include proper accounting, investment activity reporting, performance reporting and internal activity reporting.

Annual Audit:

1. The accounting records for the pooled endowment funds will be maintained in conformity with generally accepted accounting principles and reporting standards, and will be audited annually by the same independent external auditors who audit the Foundation's financial statements.

2. The annual audited financial statements and auditor's letter to management will be presented at the Foundation's annual meeting.

3. The internal controls utilized by the Foundation will be adapted to meet the needs of all pooled endowment funds and will be routinely reviewed by external auditors for appropriateness.

Investment Pool:

1. Endowments which own pooled endowment fund unit participation shares will be separately accounted for -- each will have their own separate fund identification and subaccounts which detail uninvested cash, fund balance invested in a pooled endowment fund, and total fund balance.

2. Endowments which have cash available for investing in a pooled endowment fund will be allowed to purchase unit participation shares at their fair market value on the first day of each month.

3. The fair market value of a unit participation share will be determined as of the close of business on the last working day of each month. The share value will be determined by valuing the pooled endowment fund's portfolio at market and dividing that market value by the number of permanent unit participation shares outstanding.

4. The pooled endowment fund's annual spending distributions will be made based on the number of distribution unit participation shares owned by each endowment.

5. The Foundation's Director of Finance and Financial Staff will ensure idle cash is fully invested until needed for distributions at year end, and for transfer to a pooled endowment from individual endowments to purchase unit participation shares.

6. The Foundation will receive all broker/custodial confirmations for purchases and sales of securities and ensure that (1) purchases are paid in a timely manner, (2) sales proceeds are received and immediately deposited in a Foundation brokerage/custodial or bank account and invested, (3) the financial records properly reflect all purchases and sales, and (4) sales and purchase commissions are reasonable.

Investment Management:

1. The Foundation will monitor investment activity and determine whether or not current established portfolio investment parameters are being followed.

2. The Foundation will receive monthly broker/custodial statements and reconcile detail shown thereon to the financial and investment records.

3. The Foundation will record all interest and dividend payments and ensure they are (1) the proper amount, (2) properly recorded on the financial records.

4. The Foundation will maintain a detailed schedule of investments to ensure that all dividends and interest are, in fact, received when due, and that the exact location of all investments is known at all times.

5. The Foundation will ensure accurate and timely investment data is submitted to an independent funds evaluation firm so that firm can prepare investment performance reports.

6. The Foundation will ensure that accurate and timely Investment Activity Reports are prepared for use by Investment Managers, Investment Committee and others.

7. The Foundation will prepare accurate and timely monthly valuations of the pooled endowment fund portfolios and calculate the value of a unit participation share.

8. The Foundation will ensure that endowments which have cash available for the purchase of pooled endowment fund unit participation shares have that cash transferred to the appropriate pooled endowment fund in a timely manner, and that the investment manager is aware of the amount of new money available for investment.

9. The Foundation will approve all operating expenses associated with the operation of all pooled endowment funds and initiate action to ensure said expenses are paid in a timely manner and properly recorded on the financial records.

Appendix A
Spending Policy

Recording Date: Spending Policy reaffirmed as of 11/13/15, effective for FY 7/1/16-6/30/17

The CIT distribution to the University of Idaho for expenditure in support of students through scholarships, academic programs and other objectives as specified by each endowment's guidelines is calculated in accordance with the spending rate approved annually by the Foundation's Board of Directors:

- **4.40% spending rate**
- **36 month rolling average**
- **Begin Date: July 1, 2012**
- **End Date: June 30, 2015**

Appendix B

Asset Allocation Policy

Recording Date: Asset Allocation Policy approved on 11/12/15, effective retroactively to 6/1/15

Asset Class	Policy Target	Allowable Ranges Min	Allowable Ranges Max	Policy Benchmark
Equity	***70%***	***65%***	***75%***	
U.S. Equity	28%	18%	38%	Russell 3000
Developed International	20%	12%	28%	MSCI EAFE
Emerging Markets	7%	5%	10%	MSCI EM (net)
Inflation-Sensitive Equity	5%	0%	10%	MSCI ACW Commodity Producers
Private Investments	10%	5%	15%	MSCI ACWI (net)
Fixed Income and Cash	***30%***	***25%***	***35%***	
Core Fixed Income	15%	10%	20%	Barclays Aggregate
Treasuries	5%	3%	7%	Barclays 5-10 Yr Treasury Bond Index
Inflation-Linked Bonds	5%	3%	7%	Barclays US TIPS
Cash	5%	2%	8%	Citi 3-month Treasury Bill
	100%			

Macroeconomic Hedges

Inflation-Sensitive *(Inflation-Sensitive Equity, Inflation-Linked Bonds & Cash)*	min. 10%	(no max.)
Deflation-Sensitive *(Treasuries & Cash)*	min. 8%	(no max.)

Indexed Investments *(as % of asset class composite)*

U.S. Equity	35%-50%
Developed International	50%
Emerging Markets	33%

Policy Index
A blend of Policy Benchmark returns weighted at the Policy Target percentages

Marketable Assets Policy Index
A blend of Policy Benchmark returns weighted at the Policy Target percentages, excluding the target/benchmark for Private Investments

Simple Risk-Equivalent Index
Over full market cycles, this Policy Portfolio is expected to exhibit volatility similar to or less than that of a Simple Index of 70% global stocks (MSCI ACWI, net) / 30% bonds (Barclays Aggregate).

Liquidity Guidelines
No new Private Investment commitments while:
(1) Private investment NAV > 15% of total assets
(2) Private investment NAV + unfunded commitments > 20% of total assets

Exhibit E

UIF Articles of Incorporation and Amendments

THIRD REVISED AND RESTATED ARTICLES OF INCORPORATION

THE UNIVERSITY OF IDAHO FOUNDATION, INC.

FILED EFFECTIVE
2003 NOV 24 PM 4:01
SECRETARY OF STATE
STATE OF IDAHO
IDAHO SECRETARY OF STATE
11/24/2003 05:00
CK: 1874978 CT: 128175 BH: 713
1 @ 30.00 = 30.00 AMD PROF
C42837

ARTICLE I

Name and Address

The name of this corporation is:

THE UNIVERSITY OF IDAHO FOUNDATION, INC.

The registered agent, location, and post office address of the registered and principal office of the Corporation is:

Executive Director
University of Idaho Foundation, Inc.
1106 Blake Street
PO Box 443150
Moscow, Idaho 83844-3150

ARTICLE II

Not for Profit

The Corporation is a nonprofit corporation under the Idaho Nonprofit Corporation Act. The Corporation is not formed for pecuniary profit. No part of the income or assets of the Corporation shall inure to the benefit of or be distributable to its members, directors, officers, or other private persons, except to the extent permissible by law and except that the Corporation shall be authorized and empowered to pay reasonable compensation for services rendered and to make payments and distributions in furtherance of the purposes set forth in Article IV hereof.

ARTICLE III

Term

The term of the Corporation is perpetual.

ARTICLE IV

Purposes

The Corporation is organized, and shall be operated exclusively, for the following purposes: to exercise all of the rights and powers conferred by the laws of the state of Idaho upon nonprofit corporations, including without limiting the generality of the foregoing, to acquire by bequest, devise, gift, purchase, lease, charitable trusts, life estates, or any other method of transferring any property of any sort or nature, without limitation as to its amount or value, and to hold, invest, reinvest, manage, use, apply, employ, sell, expend, disburse, lease, mortgage, convey, option, donate, or otherwise dispose of such property and the income, principal, and proceeds of such property for the benefit of the University of Idaho. No substantial part of the activities of the Corporation shall be the carrying on of propaganda, or otherwise attempting to influence legislation, and the Corporation shall not participate in or intervene in (including the publishing or distribution of statements) any political campaign on behalf of or in opposition to any candidate for public office. Notwithstanding any other provision of these articles, the Corporation shall not carry on any other activities not permitted to be carried on (a) by a corporation exempt from federal income tax under Section 501(c)(3) of the Internal Revenue Code of 1986, or corresponding provision of any future federal tax code (hereinafter "Internal Revenue Code"), or (b) by a corporation, contributions to which are deductible under Section 170(c)(2) of the Internal Revenue Code.

ARTICLE V

Trusts and Trust Funds

Notwithstanding the provisions of Article IV, any donor or testator may direct that his or her gift shall be held in such charitable trusts as may be specifically designated by said donor or testator and in such case his or her intentions shall be carried out by The University of Idaho Foundation, Inc. (hereinafter "Foundation"). Donors or testators may give a principal sum to the Foundation for the benefit of said Foundation, and provide that the income thereof shall be payable to the donor during his or her life, or that it shall be paid to a beneficiary or beneficiaries named by him or by her for life, or for some other period of time, and that after the termination of the estate or estates so provided, the income or principal shall be disbursed as part of the unrestricted income or principal of said Foundation in accordance with Article IV or for such charitable purposes as the donor or testator may specify in accordance with this Article V.

If the members of the Foundation by the vote of ninety percent (90%) of the members shall at any time declare that the purposes of any gift made pursuant to this Article V have become (1) unnecessary, undesirable, impracticable, or impossible of fulfillment, or (2) if any beneficiary to which the income or principal of any gift shall be provided to be paid shall have become nonexistent or shall have ceased its activities, or (3) if for any other reasons the application or applications provided by the said donor or testator shall have become impossible, impracticable, unnecessary, or undesirable, the Foundation shall apply such gift to the purposes set forth in Article IV. The determination of the members that such purposes have become unnecessary, undesirable, impracticable, or impossible of fulfillment shall be binding and conclusive upon all persons.

The Foundation may accept appointments by any court of competent jurisdiction as trustee to hold any fund or funds under the terms of these articles.

ARTICLE VI

Commingling of Funds

In the absence of any provisions expressing the intention of the donor or testator to the contrary, the Foundation shall be authorized to mingle any property given to it under the terms hereof with other property given to it under the terms hereof without obligation to retain any gift as a separate fund, but any donor or testator may direct that his or her gift be held as a separate fund and may, if he or she so desires, designate such fund as a memorial fund in memory of a particular person or event, and in such case the said fund shall be maintained as a separate fund forming a part of the said Foundation, under such name, if any, as may be properly designated therefor. The Foundation shall in any event be authorized to hold as a separate fund any gift which, in the discretion of the Foundation shall require segregation in order to carry out any specific provision expressed by the donor or testator, or which shall require such segregation or any other reason deemed sufficient by the Foundation.

Subject to any written agreement with the donor or testator to the contrary, if any fund, the income of which is directed by the donor or testator to be paid to any donor or other beneficiary, is commingled, the Foundation shall make available to pay to such donor or other beneficiary as income on such fund the average rate of return on such commingled funds.

If, at any time after such mingling of funds shall have taken place, it should thereafter for any reason be deemed by the foundation as desirable or necessary to separate any fund or funds, each fund so separated shall be considered to be that proportion of the value at the date of separation of the principal or income of the combined funds as the value at the date of gift of such fund so separated shall bear to the total value of such combined funds at said last mentioned date plus any subsequent gifts valued as of the date thereof.

ARTICLE VII

Membership The membership of this Corporation shall consist of one or more classes of members as prescribed in the bylaws. The manner of acting and meeting procedures for the members shall be as prescribed by the bylaws of this Corporation.

ARTICLE VIII

Board of Directors

Management of the affairs of the Corporation shall be by the board of directors who may delegate to officers and to committees of their own number and such additional members from the general membership as the board may deem appropriate such of their powers as they see fit. Directors shall be selected by the members at the times stated in the bylaws, for such terms and in such manner as the bylaws prescribe.

ARTICLE IX

Officers

Officers shall consist of a president, one or more vice presidents, a secretary, and a treasurer. The president and vice presidents shall be selected from members of the board of directors but the secretary and treasurer need not be directors or members. Two (2) or more offices may be held by the same person except that the president may not be secretary or treasurer. Officers shall be selected by the board of directors at the times, for such terms and in such manner as the bylaws prescribe.

ARTICLE X

Dissolution

In the event of the dissolution of this Corporation, or in the event that it should cease to carry out its purposes, no member, director, officer, or individual shall be entitled to or receive any distribution or division of its remaining assets, property or proceeds, and the balance of all property and assets of the Corporation from any source, after the payment of all debts and obligations of the Corporation, shall be vested in the Board of Regents of the University of Idaho in trust for the use and benefit of the University.

Any such assets not so disposed of shall be distributed for one or more exempt purposes within the meaning of Section 501(c)(3) of the Internal Revenue Code, or shall be distributed to the federal government, or to a state or local government, for a public purpose.

ARTICLE XI

Tax Exemption

It is the intent of the incorporators that this organization shall be incorporated as a tax-exempt organization to which deductible gifts may be made pursuant to the terms of the Internal Revenue Code. To that end, this Corporation shall be subject to all the restrictions and requirements now or hereafter imposed by the United States Internal Revenue Code, any rules and regulations duly and properly promulgated in the application and interpretation of said Code with which compliance is required for qualification as a tax exempt organization. In particular, in any year in which this Corporation is a "private foundation," as that term is defined in the Internal Revenue Code, its income must be distributed at such time and in such manner as not to subject this Corporation to taxes under Section 4942, Internal Revenue Code, or in the regulations promulgated thereto, and the Corporation shall not engage in any act of self dealing as defined in Section 4941, Internal Revenue Code, or in the regulations promulgated pursuant thereto, and shall not retain any excess business holdings as defined in Section 4042(c), Internal Revenue Code, or under the regulations promulgated pursuant thereto, and shall not make any investments in such manner as to subject the Corporation to taxes under Second 4944, Internal Revenue Code, or in the regulations promulgated pursuant thereto, and shall not make any taxable expenditures as defined in Section 4945(d), Internal Revenue Code, or in the regulations promulgated pursuant thereto.

ARTICLE XII

Amendments

The articles of incorporation of this Corporation may be altered, amended, or newly adopted at any meeting of the members of the Corporation called for the purpose by majority of a quorum of the voting members present, in person or by proxy, provided that notice is sent to each member not less than ten (10) days prior to such meeting, and provided that a quorum is present. A majority of the voting members of the Corporation shall constitute a quorum for such purposes. Such notice shall state in a general way the nature of the proposed change.

ARTICLE XIII

Notice

Except as otherwise specified, whenever notice is required, it shall be in writing sent prepaid not less than three (3) days before the event if by electronic transmission and not less than six (6) days if by mail, addressed to the last known address. Notice may be waived either before or after a meeting.

Pursuant to the provisions of the Articles of Incorporation and Bylaws of The University of Idaho Foundation, Inc., an Idaho nonprofit corporation, and pursuant to the Idaho Nonprofit Corporation Act, the qualified voting members of the Corporation duly noticed, approved, and adopted the within and foregoing third revised and restated articles of incorporation and all of the amendments therein contained, at a duly constituted meeting held on October 17, 2003.

Executed in triplicate effective October 20, 2003.

THE UNIVERSITY OF IDAHO FOUNDATION, INC.

By: Joanne B. Carr

Joanne B. Carr, Secretary

University of Idaho

Alumni Association
PO Box 443232
Moscow ID 83844-3232

Phone: 208-885-6154
Fax: 208-885-6975
alumni@uidaho.edu
www.idahovandals.com

November 29, 2011

To Whom It May Concern:

This document is to confirm that the University of Idaho Alumni Association recognizes the University of Idaho Foundation as the official organization designated to receive gifts for the University of Idaho Alumni Association.

Signed

Steven C. Johnson
Executive Director

To enrich education through diversity, the University of Idaho is an equal opportunity/affirmative action employer.

FILED EFFECTIVE

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SECRETARY OF STATE
STATE OF IDAHO

ARTICLES OF AMENDMENT
OF
THE UNIVERSITY OF IDAHO FOUNDATION, INC.

Pursuant to the provisions of Title 30, Chapter 3, Idaho Code, The University of Idaho Foundation, Inc. adopts the following Articles of Amendment to its Third Revised and Restated Articles of Incorporation (the "Articles of Incorporation"):

FIRST: The name of the Corporation is The University of Idaho Foundation, Inc.

SECOND: The following Articles of the Corporation's Articles of Incorporation are amended to state as follows:

ARTICLE I.
Name and Address.

The name of this corporation is:

THE UNIVERSITY OF FOUNDATION, INC.

The registered agent, location, and address of the registered and principal office of the Corporation is:

Nancy McDaniel
714 W. State Street, Suite 240
Boise, Idaho 83702

ARTICLE V.
Trust and Trust Funds.

This Article shall be deleted.

ARTICLE VII.
No Members.

The Corporation shall have no members.

IDAHO SECRETARY OF STATE
02/04/2009 05:00
CK: NONE CT: 2105 BH: 1155540
1 @ 30.00 = 30.00 NON PROF A # 2
1 @ 20.00 = 20.00 NON EXPEDI # 3

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ARTICLE VIII.
Board of Directors.

The affairs of the Corporation shall be managed by its Board of Directors. The Directors shall be elected by the existing Directors of the Corporation in the manner and for the term provided in the Corporation's bylaws.

ARTICLE IX.
Officers.

The officers of the Corporation and their respective duties shall be as set forth in the Corporation's bylaws.

ARTICLE XI.
Tax Exemption.

The Corporation was incorporated as a tax-exempt organization to which deductible gifts may be made pursuant to the terms of the Internal Revenue Code. To that end, this Corporation shall be subject to all restrictions and requirements now or hereafter imposed by the United States Internal Revenue Code, any rules and regulations duly and properly promulgated in the application and interpretation of said Code with which compliance is required for qualification as a tax exempt entity described in Section 170(c)(2) of the Code. In particular, in any year in which this Corporation is a "private foundation," as that term is defined in the Internal Revenue Code, its income must be distributed at such time and in such manner as not to subject this Corporation to taxes under Section 4942, Internal Revenue Code, or in the regulations promulgated thereto, and the corporation shall not engage in any act of self dealing as defined in Section 4941, Internal Revenue Code, or in the regulations promulgated pursuant thereto, and shall not retain any excess business holdings as defined in Section 4042(c), Internal Revenue Code, or under the regulations promulgated pursuant thereto, and shall not make any investments in such manner as to subject the Corporation to taxes under Section 4944, Internal Revenue Code, or in the regulations promulgated pursuant thereto, and shall not make any taxable expenditures as defined in Section 4945(d), Internal Revenue Code, or in the regulations promulgated thereto.

ARTICLE XII.
Amendments.

The Board of Directors of the Corporation shall be authorized to amend these Articles and the Corporation's bylaws at a properly noticed special or regular meeting of the Board of Directors or by unanimous written consent of the Board of Directors.

THIRD: The date of the adoption of this amendment by the Members of the Corporation was the 30th day of January, 2009, in the manner prescribed by the Idaho Nonprofit Corporation Act. The number of members entitled to vote was 18. The number of members that voted for this amendment was 14, which was sufficient for approval of the amendment. The number of members that voted against this amendment was 0.

Dated the 30th day of January, 2009.

THE UNIVERSITY OF IDAHO
FOUNDATION, INC.

By: Frances T. Ellsworth
Frances T. Ellsworth, Chairman

By: Nancy C. McDaniel
Nancy C. McDaniel, Secretary

4402521_3.DOC

Exhibit F

UIF Bylaws

Policy: BYLAWS

Section: Executive

Number: 3

Resolution Recording Date: August 31, 2009, April 15, 2011, Second Amended and Restated, November 2, 2012, Third Amended and Restated

Committee: Executive

THIRD AMENDED AND RESTATED

BYLAWS
OF
THE UNIVERSITY OF IDAHO FOUNDATION, INC.

The Third Amended and Restated Bylaws ("Bylaws") of the University of Idaho Foundation, Inc. ("Foundation") are as follows:

1. OFFICES.

1.1 Principal Office. The principal office of the Foundation, shall be located at 714 W. State Street, Suite 240, Boise Idaho, 83702. The Foundation may have other offices as the Board may designate or as the business of the Foundation may require from time to time.

1.2 Registered Office. The registered office of the Foundation required by the Idaho Nonprofit Corporation Act, Chapter 3, Title 30, Idaho Code, to be maintained in the State of Idaho shall be located at 714 W. State Street, Suite 240, Boise Idaho, 83702, and may be changed from time to time by the Board.

2. BOARD OF DIRECTORS.

2.1 General Powers. All corporate powers shall be exercised by or under the authority of, and the business and affairs of the Foundation shall be managed under the direction of, the Board except as may be otherwise provided in the Idaho Nonprofit Corporation Act or the Articles of Incorporation ("Articles").

2.2 Standard of Care. A Director shall perform such Director's duties as a Director, including such Director's duties as a member of any committee of the Board upon which the Director may serve, in good faith, in a manner such Director reasonably believes to be in the best interests of the Foundation, and with such care as an ordinarily prudent person would use in a similar position under similar circumstances. In performing a Director's duties, a Director shall be entitled to rely on information, opinions, reports or statements, including financial statements and other financial data, in each case prepared or presented by:

(a) one or more officers or employees of the Foundation whom the Director reasonably believes to be reliable and competent in the matters presented;

(b) counsel, public accountants or other person as to matters that the Director reasonably believes to be within such person's professional or expert competence;

(c) a committee of the Board which committee the Director reasonably believes to merit confidence; or

(d) information received from employees of the University of Idaho;

but a Director shall not be considered to be acting in good faith if a Director has knowledge concerning the matter in question that would cause such reliance to be unwarranted. A person who performs such duties shall have no liability by reason of being or having been a Director.

2.3 Number and Election of Directors. The number of Directors serving on the Board shall consist of at least 15 and no more than 25 members in an exact number as determined from time to time by the Board. The existing Directors shall elect individuals to fill vacant positions on the Board on an annual basis, and the Board may also elect Directors or from time to time throughout the year.

2.4 Term of Directors. Each Director shall serve a term of 3 years and shall serve a maximum of 2 consecutive 3 year terms, except, if any Director is the incoming Chairman or Past-Chairman at the time that his or her second 3 year term expires, the Director's term shall automatically be extended for any period of time during which he or she serves as the Chairman and as the Past-Chairman, regardless of whether such term exceeds the 2 consecutive 3 year term limit.

2.5 Vacancies. Any vacancy occurring on the Board may be filled upon the recommendation of the Chairman and affirmative vote of a majority of the remaining Directors, even if the remaining Directors make up less than a quorum of the Directors. A Director elected to fill a vacancy shall be elected for the unexpired term of such Director's predecessor in office.

2.6 Removal of Directors. At a meeting of the Board called expressly for that purpose, any director may be removed with cause by a vote of a majority of the Directors then in office. Any Director may be removed at such a meeting without cause by a vote of two-thirds of the Directors then in office.

2.7 Committees of Directors.

2.7.1 Membership. The Board, by resolution adopted by a majority of the Directors, may designate and appoint one or more Director committees, each of which shall consist of two or more Directors. The Chairman shall recommend to the Board nominees for each committee. Individuals who are not Directors may also serve on such committees in an advisory capacity, but non-Director members of a committee shall not vote on matters before the committee. The Chairman and the Vice-Chairman of the Foundation may, in their discretion, serve on each committee.

2.7.2 Authority. Director committees, to the extent provided in the resolution establishing the committee, shall exercise the authority of the Board in the management of the Foundation; provided, however, that no Director committee shall have the authority to (i) authorize distributions, (ii) approve dissolution, merger or the sale, pledge or transfer of all or substantially all of the Foundation's assets, (iii) elect, appoint or remove directors or fill vacancies on the Board or on any of its committees, or (iv) adopt, amend or repeal the Articles or these Bylaws.

2.7.3 Standing Director Committees. The Foundation shall have the following standing committees unless the Board determines that any such committee shall not exist for any period of time.

a. Executive Committee. The Executive Committee shall consist of the Chairman, Vice-Chairman, Past-Chairman, Treasurer, and Secretary. The Executive Director shall serve in an advisory capacity to the Executive Committee. Except as prohibited in Section 2.7.2 above, during the intervals between meetings of the Board, the Executive Committee shall possess and may exercise all powers of the Board in the management and direction of the affairs of the Foundation in such manner as it shall deem best for the interest of the Foundation in all cases in which specific direction shall not have been otherwise given by the Board. The Executive Committee shall also evaluate the performance of the Executive Director, and the Executive Director's responsibility to serve the Committee in an advisory capacity shall be relieved during such evaluation. All actions by the Executive Committee shall be reported to the Board at its next meeting succeeding such action.

b. Committee on Directors. In addition to other duties assigned by the Board, the Committee on Directors shall (i) screen, recruit, and recommend potential Board of Director members, taking into consideration the skills needed, ethnicity, gender, and geographical representation of various candidates, (ii) recommend to the Board a slate of officers for election, (iii) evaluate the performance of Directors and officers, both individually and collectively, as needed or upon request by the Board, and (iv) perform governance review of Foundation bylaws, policies and procedures annually, and (v) coordinate the orientation of new Board Members.

c. Operations and Finance Committee. In addition to other duties assigned by the Board, the Operations and Finance Committee shall develop the organization's finance and operational policy and advise the Board on (i) general fiscal policy, fiscal management and all operational matters including budgetary and financial issues, and (ii) the Foundation's staffing and salary structure.

d. Investment Committee. In addition to other duties assigned by the Board, the Investment Committee shall develop the investment policy and make recommendations regarding (i) how investments will be managed, (ii) asset allocations, (iii) direct investments, (iv) selection of investment managers, (v) recommend the annual spending payout and (vi) evaluate endowment fees on a regular basis. The Investment Committee will also review the Foundation's investment portfolio performance and provide periodic reports to the Board on investment operations and results.

e. Audit Committee. In addition to other duties assigned by the Board, the Audit Committee shall oversee the Foundation's audit process, which shall include (i) communication with the auditors and the Foundation's staff, (ii) review of the audit and management letter process, and (iii) recommending to the Board potential auditors.

f. Gift Acceptance Committee. In addition to other duties assigned to it by the Board, the Gift Acceptance Committee (GAC) shall develop the gift acceptance policies, guidelines and procedures regarding the terms of acceptance of trust gifts, charitable gift annuities, bargain sales, and gifts of assets which are not readily marketable to be presented to the Board for approval.

2.7.4 Tenure. Each member of a committee shall continue as such until the next annual meeting of the Board of the Foundation and until a successor is appointed unless (i) the committee is sooner terminated, (ii) such member is removed from the committee, or (iii) such member ceases to qualify as a member of the committee. The Board may, from time to time during the year, add additional committee members to any committee.

2.7.5 Committee Chairs. One member of each committee shall serve as the chair. Nominations for the chair of each committee shall be provided by the Chairman of the Board, and the full Board shall elect each committee chair.

2.7.6 Vacancies. Vacancies in the membership of any committee may be filled by appointments made by the Board upon the recommendation of the Chairman.

2.7.7 Resignation. Any committee member may resign at any time by giving written notice to the Board, the Chairman, or the Secretary of the Foundation. Unless otherwise specified in the notice of resignation, the resignation shall take effect upon receipt. Acceptance of the resignation shall not be necessary to make the resignation effective.

2.7.8 Removal. Any committee member may be removed by the Board with or without cause.

2.7.9 Quorum. Unless otherwise provided in the resolution of the Board designating a committee, a majority of the Director members of the committee shall constitute a quorum and the act of a majority of the Director members present at a meeting at which a quorum is present shall be the act of the committee.

2.8 Board Advisories. From time to time, the Board may designate individuals and/or committees to serve in an advisory capacity and to attend certain Board meetings. Such advisories are not members of the Board, but shall provide input to the Board on various matters as necessary.

2.9 Emeritus Directors. Any person who has previously served as the Chairman or President of the Foundation shall be designated as an Emeritus Director. In addition, the Board may designate any former Director who has exhibited exemplary service to the Foundation as an Emeritus Director. An Emeritus Director shall serve in an advisory capacity to the Board and shall be invited to attend certain Board meetings.

2.10 Executive Sessions of the Board. The Board may, from time to time, designate certain meetings or part of any meeting of the Board to be an executive session of the Board, in which case all members of the Foundation's management team, members of the University of Idaho's leadership team, and any other persons present at the Board meeting shall be excused from the meeting unless any of them shall be invited by the Chairman to remain.

2.11 Directors' and Committee Meetings.

2.11.1 Place for Meetings. Meetings of the Board, regular or special, or meetings of any committee designated thereby, may be held either within or without the State of Idaho. Unless otherwise specified in the notice for such meeting, all meetings shall be held at the principal office of the Foundation.

2.11.2 Frequency of Meetings. At least 1 regular meeting of the Board shall be held each fiscal year, along with the annual meeting. Special meetings may be called from time to time as needed.

2.11.3 Notice of Meeting. Regular or special meetings of the Board may be called by the Chairman or any Director. Regular or special meetings of any committee of the Board may be called by the Chairman, any Director, or the chair of any committee. Notice of any meeting shall be given by written, electronic, or verbal notice to all other Directors or committee members, as the case may be, at least 2 days before the meeting.

2.11.4 Participation in Meeting. Members of the Board or any committee may participate in a meeting of the Board or such committee by conference telephone or similar communications equipment by means of which all persons participating in the meeting can hear each other at the same time. Participation by such means shall constitute presence in person at a meeting.

2.11.5 Presumption of Assent. A Director who is present at a Board meeting at which any action on any corporate matter is taken shall be presumed to have assented to the action unless such Director's dissent shall be entered in the minutes of the meeting or unless such Director shall file such Director's written dissent to such action with the Secretary of the meeting before the adjournment thereof or shall forward such dissent by certified or registered mail to the Secretary of the Foundation within 3 days after the adjournment of the meeting. Such right to dissent shall not apply to a Director who voted in favor of such action.

2.11.6 Attendance Constitutes Waiver of Notice. The attendance at or participation of a Director or committee member in any meeting shall constitute a waiver of notice of such meeting, except where a Director or committee member attends or participates for the express purpose of objecting to the transaction of any business on the ground that the meeting is not lawfully called or convened.

2.12 Waiver of Notice. Whenever any notice is required to be given to any Director or committee member under the provisions of the Idaho Nonprofit Corporation Act, the Articles or these Bylaws, a waiver in writing signed by the person or persons entitled to such notice, whether before or after the time stated in the notice shall be equivalent to the giving of such notice. The notice or waiver for any meeting need not specify the business to be transacted at, or the purpose of the meeting.

2.13 Quorum and Voting Requirements. A majority of the number of existing Directors shall constitute a quorum for the transaction of business at meetings of the Board. The act of the majority of the Directors present at a meeting at which a quorum is present shall be the act of the Board. A majority of the number of existing committee members shall constitute a quorum for the transaction of business at a meeting of such committee. The act of the majority of the committee members present at a meeting at which a quorum is present shall be the act of the committee.

2.14 Action without a Meeting. Any action required by the Idaho Nonprofit Corporation Act to be taken at a Board meeting, or any action that may be taken at a meeting of the Directors or of a committee, may be taken without a meeting if a consent in writing, setting forth the action taken, is signed by all of the Directors, or all of the members of the committee, as the case may be. Such consent shall have the same effect as a unanimous vote.

2.15 Compensation. No Director or committee member shall receive a salary or compensation for services in that capacity but may be reimbursed for actual expenses incurred in the performance of such services. This provision shall not preclude any Director from serving the Foundation in any other capacity and receiving compensation for services rendered.

2.16 Director Conflicts of Interest. Any Director who has an interest in a contract or other transaction presented to the Board or a committee thereof for authorization, approval, or ratification shall make a prompt and full disclosure of their interest to the Board or committee prior to its acting on such contract or transaction. Such disclosure shall include any relevant and material facts known to such a person about the contract or transaction that might reasonably be construed to be adverse to the Foundation's interest. In addition, each Director shall comply with any conflict of interest policy that may be adopted by the Foundation from time to time.

2.17 Loans to Directors. The Foundation shall not lend money to or use its credit to assist its Directors or officers.

3. OFFICERS.

3.1 Number and Titles. The elected officers of the Foundation shall consist of a Chairman, Past-Chairman, Vice-Chairman, Secretary, and Treasurer, each of whom shall be elected by the Board. The Board shall also appoint and employ an Executive Director and any other employees or staff members that the Board deems to be necessary. The Board may also elect or appoint additional officers and assistant officers as may be deemed necessary. Any two or more offices may be held by the same person.

3.2 Election and Term of Office. The officers of the Foundation shall be elected annually at the annual meeting of the Board. If the election of officers shall not be held at such meeting, such election shall be held as soon as practicable thereafter. Each officer shall hold office until the following annual meeting. An officer's term shall end prior to the annual meeting in the case of death or permanent disability, or until such officer shall resign or shall have been removed in the manner hereinafter provided.

3.3 Removal. Any officer or agent may be removed by the Board whenever in its judgment the best interests of the Foundation will be served thereby, but such removal shall be without prejudice to the contract rights, if any, of the person so removed. Election or appointment of an officer or agent shall not of itself create any contract or employment rights.

3.4 Vacancies. A vacancy in any office because of death, resignation, removal, disqualification or otherwise, may be filled by the Board for the unexpired portion of the term.

3.5 Officer Duties.

3.5.1 Chairman. The Chairman shall be the chief volunteer officer of the Foundation and shall in general supervise and control all the business and affairs of the Foundation in accordance with the direction of the Board. He or she shall, when present, preside at all meetings of the Board of Directors. He or she may sign checks, contracts, deeds, mortgages, notes, or other financial instruments on behalf of the Foundation. He or she may delegate and assign authority to sign any financial instruments of the Foundation in accordance with the Foundation's Financial Policy. He or she will present a slate of Committee chairs and committee members annually to the Board for approval. He or she shall also perform all duties as may be prescribed from time-to-time by the Board.

3.5.2 Vice-Chairman. The Vice-Chairman shall, in the absence of the Chairman or in the event of his or her death, inability or refusal to act, perform the duties of the Chairman, and, when so acting, shall have all the powers and be subject to all the restrictions upon the Chairman.

3.5.3 Past-Chairman. The Past-Chairman shall advise the Chairman and Vice-Chairman concerning the prior business of the Foundation. The Past-Chairman shall also perform all duties as may be prescribed from time-to-time by the Board.

3.5.4 Secretary. The Secretary shall attend all meetings of the Board and shall keep, or cause to be kept, in a book or file provided for the purpose, a true and complete record of the proceedings of such meetings. He or she shall have power to authenticate records, have custody of the books (except books of account), records and corporate seal of the Foundation, and in general shall perform all duties pertaining to the office of Secretary and such other duties as these Bylaws or the Board may prescribe.

3.5.5 Treasurer. The Treasurer shall keep correct and complete records of account. He or she shall be responsible for all of the Foundation's funds and securities and other valuables. The Treasurer shall deposit all funds of the Foundation with such depositories as the Board shall designate. The Treasurer shall furnish the Board with financial statements whenever requested and at each annual meeting and at the end of the fiscal year. He or she may sign checks, contracts, deeds, mortgages, notes, or other financial instruments on behalf of the Foundation pursuant to authority given to him or her in accordance with the Foundation's Financial Policy. The Treasurer shall also perform all duties as may be prescribed from time-to-time by the Board. The Treasurer may delegate any of the responsibilities and authorities set forth in this section to an Assistant Treasurer.

3.5.6 Executive Director. The Executive Director shall be either an employee of the Foundation or a loaned employee from the University of Idaho. The Executive Director shall perform all duties that may be prescribed from time to time by the Board, and shall serve pursuant to the terms of a written employment agreement or loaned employee agreement approved by the Board. The Executive Director shall be authorized to sign written documents and financial instruments of the Foundation. The Executive Director also shall be authorized to sign any other documents necessary to accomplish the day-to-day business of the Foundation.

3.6 Salaries. The salaries of the officers, if any, shall be fixed from time to time by the Board and no officer shall be prevented from receiving such salary by reason of the fact that such officer is also a Director.

3.7 Employment of Staff. The Board shall have the authority to employ additional staff as the Foundation may reasonably require from time to time. The Board may also enter into loaned employee agreements with the University of Idaho from time to time.

3.8 Officer and Staff Conflict of Interest. Any officer or staff member who has an interest in a contract or other transaction presented to the Board or a committee thereof for authorization, approval, or ratification shall make a prompt and full disclosure of their interest to the Board or committee prior to its acting on such contract or transaction. Such disclosure shall include any relevant and material facts known to such person about the contract or transaction that might reasonably be construed to be adverse to the Foundation's interest.

4. MISCELLANEOUS.

4.1 Indemnification of Officers, Directors, Employees and Agents. The Foundation shall indemnify Directors, officers, employees and agents of the Foundation to the extent permitted by, and in accordance with, the Idaho Nonprofit Corporation Act. The Foundation shall purchase and maintain insurance on behalf of any person who is or was a Director, officer, employee or agent of the Foundation, or is or was serving at the request of the Foundation as a director, officer, employee or agent of another corporation, partnership, joint venture, trust or other enterprise against any liability asserted against such person and incurred by such person in any such capacity or arising out of such person's status as such, whether or not the Foundation would have the power to indemnify such person against such liability. This insurance shall be reviewed and updated annually to renew at the beginning of each fiscal year.

4.2 Books and Records. At its registered office or principal place of business, the Foundation shall keep: (i) minutes of the proceedings of the Board; and (ii) a record of the names and addresses of all members of the Board. The Foundation shall also keep correct and complete books and records of accounts at its registered office, principal place of business, or at any other location designated by the Foundation. Any books, records and minutes may be in written form or in any other form capable of being converted into written form within a reasonable time.

4.3 Loans. No loans shall be contracted on behalf of the Foundation and no evidences of indebtedness shall be issued in its name unless authorized by a resolution of the Board. Such authority may be general or confined to specific instances.

4.4 Contracts. The Board may authorize any officer or officers, agent or agents of the Foundation, in addition to the officers so authorized by these Bylaws, to enter into any contract or execute and deliver any instrument in the name of and on behalf of the Foundation, and such authority may be general or confined to specific instances.

4.5 Checks, Drafts, etc. All checks, drafts, or other orders for the payment of money, notes or other evidences of indebtedness issued in the name of the Foundation, shall be signed by such officer or officers, agent or agents of the Foundation as provided in these Bylaws or in such manner as shall from time to time be determined by the Board.

4.6 Deposits. All funds of the Foundation not otherwise expended or spent shall be deposited from time to time to the credit of the Foundation in such banks, trust companies or other depositories as the Board may select.

4.7 Gifts. The Board may accept on behalf of the Foundation any contribution, gift, bequest or devise for the general purposes or for any special purpose of the Foundation.

4.8 Annual Financial Statements. The officers of the Foundation shall cause a balance sheet as of the closing date of the last fiscal year, together with a statement of income and expenditures for the year ending on that date, to be prepared and presented to the Directors at each annual meeting of the Board.

4.9 Fiscal Year. The fiscal year of the Foundation shall begin on the first day of July and end on the last day of June in each year.

4.10 Regulation of Internal Affairs. The internal affairs of the Foundation shall be regulated as set forth in these Bylaws to the extent that these Bylaws are lawful under the Idaho Nonprofit Corporation Act. With respect to any matter not covered in these Bylaws, the provisions of the Idaho Nonprofit Corporation Act shall be controlling so long as such provisions of the Idaho Nonprofit Corporation Act are not inconsistent with the lawful provisions of these Bylaws.

4.11 Amendments. These Bylaws may be altered, amended or repealed and new Bylaws may be adopted by the Board at any regular or special meeting.

4.12 Amendment and Restatement of Prior Bylaws. These Bylaws amend and restate all prior bylaws of the Foundation in their entirety.

University of Idaho Foundation, Inc.

The undersigned, being the Secretary and Chairman of the Foundation, do hereby certify that the foregoing Third Amended and Restated Bylaws were duly adopted as the official Bylaws of the Foundation by unanimous consent of the Directors of the Foundation on the 2nd day of November 2012.

Nancy C. McDaniel

Nancy C. McDaniel, Secretary

Laine Meyer

Laine R Meyer, Chairman

University of Idaho Foundation, Inc.

Policy: OPERATING AGREEMENT

Section: Executive

Number: 1

Recording Date: August 31, 2009

Committee: Executive

ARTICLE I

FOUNDATION'S PURPOSES

The Foundation is the primary affiliated foundation responsible for assisting the University in soliciting, managing and distributing private support for the University. Accordingly, to the extent consistent with the Foundation's Articles of Incorporation and By-Laws, and the State Board's Policies and Procedures, the Foundation shall: (1) assist in the solicitation of, receive and accept gifts, devises, bequests and other direct or indirect contributions of money and other property made for the benefit of the University from the general public (including individuals, corporations, other entities and other sources); (2) manage and invest the money and property it receives for the benefit of the University; and (3) support and assist the University in fundraising and donor relations.

In carrying out its purposes the Foundation shall not engage in activities that conflict with (1) federal or state laws, rules and regulations (including, but not limited to all applicable provisions of the Internal Revenue Code and corresponding Federal Treasury Regulations); (2) applicable polices of the State Board; or (3) the role and mission of the University.

ARTICLE II

FOUNDATION'S ORGANIZATIONAL DOCUMENTS

The Foundation shall provide copies of its current Articles of Incorporation and Bylaws to the University. All amendments of such documents shall also be provided to the University. Furthermore, the Foundation shall, to the extent practicable, provide the University with an advance copy of any proposed amendments to the Foundation's Articles of Incorporation and Bylaws.

ARTICLE III

UNIVERSITY RESOURCES AND SERVICES

A. *University Employees.*

1. *Liaison*: The University's Vice President for University Advancement shall serve as the University's liaison to the Foundation (the "Liaison"). The duties and responsibilities of the Liaison are as follows:

a. The Liaison shall be responsible for communicating with the Foundation regarding the University's fundraising efforts and for coordinating any administrative support provided by the University to the Foundation.

b. The Liaison or the Liaison's designee shall attend each meeting of the Foundation's Board of Directors and shall report on behalf of the University to the Foundation's Board of Directors regarding the University's fundraising efforts. The Liaison may also report other information to the Foundation's Board of Directors that is pertinent to the common goals of the University and the Foundation.

2. *Executive Director*: The Executive Director of the Foundation is an employee of the University who is loaned to the Foundation. All of the Executive Director's services shall be provided directly to the Foundation as follows:

a. The Executive Director shall be responsible for the supervision and control of the day-to-day operations of the Foundation. More specific duties of the Executive Director may be set forth in a written job description prepared by the Foundation and attached to the Loaned Employee Agreement described in subparagraph c below. The Executive Director shall be subject to the control and direction of the Foundation.

b. The Executive Director shall be an employee of the University and entitled to University benefits to the same extent and on the same terms as other full-time University employees of the same classification as the Executive Director. The Foundation shall reimburse the University for all costs incurred by the University in connection with the University's employment of the Executive Director including such expenses as salary, payroll taxes, and benefits.

c. The Foundation and the University shall enter into a written agreement, substantially in the form of Exhibit "B" hereto, establishing that the Executive Director is an employee of the University but subject to the direction and control of the Foundation (generally a "Loaned Employee Agreement"). The Loaned Employee Agreement shall also set forth the relative rights and responsibilities of the Foundation and the University with respect to the Executive Director.

d. In the event the Executive Director resigns, is terminated according to the terms of the Loaned Employee Agreement, or otherwise leaves the employ of the University, hiring of the subsequent Executive Director shall be done in accordance with Foundation procedures, University procedures (including University equal employment procedures), and applicable law (including laws applicable to the University). The Foundation shall have the ability to terminate the Loaned Employee Agreement upon notice to the University as further set forth in the Loaned Employee Agreement. The Foundation must provide the University with prior approval to hire any employee that the Foundation and University intend to be a loaned employee before the University employs such individual.

e. The University and the Foundation may elect to enter into additional agreements for the loaning of additional employees to the Foundation by the University pursuant to terms substantially similar to the Loaned Employee Agreement attached as Exhibit "B." The additional loaned employees shall report to either the Foundation Board or the Executive Director of the Foundation, in either case as determined by the Foundation Board and as specified in the additional loaned employee agreements. Such loaned employees shall have no function at the University other than to act in their capacity as employees loaned to the Foundation.

f. Termination of the Executive Director in accordance with the Loaned Employee Agreement shall constitute grounds for a termination proceeding by the University or for non-renewal of the Executive Director's contract with the University, if any.

3. *Limited Authority of University Employees.* Notwithstanding the foregoing provisions, no University employee other than an employee loaned to the Foundation shall be permitted to have responsibility or authority for Foundation policy making, financial oversight, spending authority, investment decisions, or the supervision of Foundation employees.

B. *Support Staff Services.* The University shall provide administrative support in financial, accounting, investment and development services to the Foundation, as set forth in the Service Agreement attached hereto as Exhibit "C" ("Service Agreement"). Except as specifically provided otherwise herein, all University employees who provide support services to the Foundation shall remain University employees under the direction and control of the University, unless it is agreed that the direction and control of any such employee will be vested with the Foundation in a Loaned Employee Agreement. The Foundation will pay directly to the University the portion of the overhead costs associated with the services provided to the Foundation pursuant to the Service Agreement or as otherwise determined by the agreement of the Parties.

C. *University Facilities and Equipment.* The University shall provide the use of the University's office space, equipment and associated services to the Foundation's employees upon the terms agreed to by the University and the Foundation. The terms of use (including amount of rent) of the University's office space, equipment and associated services shall be as set forth in the Service Agreement.

D. *No Foundation Payments to University Employees.* Notwithstanding any contrary provision of this Agreement to the contrary, the Foundation shall not make any payments directly to a University employee in connection with any resources or services provided to the Foundation pursuant to this Article.

ARTICLE IV

MANAGEMENT AND OPERATION OF FOUNDATION

A. *Gift Solicitation.*

1. *Form of Solicitation.* Any and all Foundation gift solicitations shall make clear to prospective donors that (1) the Foundation is a separate legal and tax entity organized for

the purpose of encouraging voluntary, private gifts, trusts, and bequests for the benefit of the University; and (2) responsibility for the governance of the Foundation, including the investment of gifts and endowments, resides in the Foundation's Board of Directors.

2. *Foundation is Primary Donee.* Absent unique circumstances, prospective donors shall be requested to make gifts directly to the Foundation rather than to the University.

B. *Acceptance of Gifts.*

1. *Approval Required Before Acceptance of Certain Gifts.* Before accepting contributions or grants for restricted or designated purposes that may require administration or direct expenditure by the University, the Foundation shall obtain the prior written approval of the University. Similarly, the Foundation shall also obtain the University's prior written approval of the acceptance of any gift or grant that would impose a binding financial or contractual obligation on the University. Prior to any approval by the University, the University shall obtain approval of the State Board where State Board policy requires such approval.

2. *Acceptance of Gifts of Real Property.* The Foundation shall conduct due diligence on all gifts of real property that it receives. All gifts of real property that are intended solely by the donor to be developed for the University's use or to otherwise house facilities of any kind for the University's use shall be approved by the State Board before such gifts are accepted by either the University or the Foundation. The University shall be responsible for obtaining this approval by the State Board. In cases where the real property is intended to be used by the University in connection with carrying out its proper functions, the real property may be conveyed directly to the University, in which case the University and not the Foundation shall be responsible for the due diligence obligations for such property.

3. *Processing of Accepted Gifts.* All gifts received by the University or the Foundation shall be delivered (if cash) or reported (if any other type of property) to the Foundation's designated Gift Administration Office (a unit of the University's Trust and Investment Office) in accordance with the Service Agreement.

C. *Fund Transfers.* The Foundation agrees to transfer funds, both current gifts and income from endowments, to the University on a regular basis as agreed to by the Parties. The Foundation's Treasurer or other individual to whom such authority has been delegated by the Foundation's Board of Directors shall be responsible for transferring funds as authorized by the Foundation's Board of Directors. All transfers and expenditures noted in this Section must comply with Section 501(c)(3) of the Internal Revenue Code and be consistent with the Foundation's sole mission to support the University.

1. *Restricted Gift Transfers.* The Foundation may transfer restricted gifts to the University. Any such transferred restricted gifts will only be expended by the University pursuant to the terms of such restrictions. The Foundation shall inform the University officials into whose program or department restricted gifts are transferred of all restrictions on the use of

such gifts and provide such officials with access to any relevant documentation concerning such restrictions. Such University officials shall account for such restricted gifts separate from other program and department funds in accordance with applicable University policies and shall notify the Foundation on a timely basis regarding the uses of such restricted gifts.

2. *Unrestricted Gift Transfers.* The Foundation may utilize any unrestricted gifts it receives for any use consistent with the Foundation's purposes as generally summarized in Article I of this Operating Agreement. The Foundation may make unrestricted donations to the University. Such donated funds will be expended under the oversight of the University President in compliance with state law and University policies. If the Foundation elects to use unrestricted gifts to make grants to the University, such grants shall be made at such times and in such amounts as the Foundation's Board of Directors may determine in such Board's sole discretion.

D. *Foundation Expenditures and Financial Transactions.*

1. *Signature Authority.* The Foundation designates the Foundation Chairman and Treasurer as the individuals with signature authority for the Foundation in all financial transactions. The Foundation's Treasurer may also delegate signature authority on a temporary basis consistent with the Foundation's Bylaws to another Foundation employee, an employee loaned to the Foundation, or a Foundation Board member who is not a University employee. In no event may the person with Foundation signature authority for financial transactions be a University employee, unless such individual is an employee who is loaned to the Foundation.

2. *Expenditures.* All expenditures of the Foundation shall be (1) consistent with the purposes of the Foundation, and (2) not violate restrictions imposed by the donor or the Foundation as to the use or purpose of the specific funds.

E. *University Report on Distributed Funds.* On a regular basis, which shall not be less than annually, the University shall report to the Foundation on the use of restricted and unrestricted funds transferred to the University. This report shall specify the restrictions on any restricted funds and the uses of such funds.

F. *Transfer of University Assets to the Foundation.* No University funds, assets, or liabilities may be transferred directly or indirectly to the Foundation without the prior approval of the State Board except when:

1. A donor inadvertently directs a contribution to the University that is intended for the Foundation in which case such funds may be transferred to the Foundation so long as the documents associated with the gift indicate the Foundation was the intended recipient of the gift. In the absence of any such indication of donor intent, such gift shall be deposited in a University account and, except for transfers described in subsections 2 and 4 of this Section, State Board approval will be required prior to the University's transfer of such funds to the Foundation.

2. The University has gift funds that were originally transferred to the University from the Foundation and the University wishes to return a portion of those funds to the Foundation for reinvestment consistent with the original intent of the gift.

3. The University has raised scholarship funds through a University activity and the University wishes to deposit the funds with the Foundation for investment and distribution consistent with the scholarship purposes for which the funds were raised.

4. The University transfers to the Foundation any gift received by the University from a donor that meets the following criteria: (i) the gift is less than $10,000, and (ii) the gift will be invested by the Foundation for scholarship or other general University support purposes. This subsection, however, shall not apply to payments by the University to the Foundation for University obligations to the Foundation, operating expenses of the Foundation or other costs of the Foundation.

G. *Separation of Funds*. All Foundation assets (including bank and investment accounts) shall be held in separate accounts in the name of the Foundation using the Foundation's Federal Employer Identification Number. The financial records of the Foundation shall be kept using a separate chart of accounts and shall be kept in a secured database that is protected by separate password-only access. For convenience, however, some Foundation expenses may be paid through the University such as payroll and campus charges. These expenses will be paid through accounts clearly titled as belonging to the Foundation and shall be reimbursed by the Foundation on a regular basis.

H. *Insurance*. To the extent that the Foundation is not covered by the State of Idaho Retained Risk Program, the Foundation shall maintain insurance to cover the operations and activities of its directors, officers and employees. The Foundation shall also maintain general liability coverage.

I. *Investment Policies*. All funds held by the Foundation, except those intended for short term expenditures, shall be invested in accordance with the Uniform Prudent Management of Institutional Funds Act, Idaho Code Sections 33-5001 to 33-5010, and the Foundation's investment policy which is attached hereto as Exhibit "D"; provided, however, the Foundation shall not invest any funds in a manner that would violate the applicable terms of any restricted gifts. The Foundation shall provide to the University any updates to such investment policy which updates shall also be attached hereto as Exhibit "D".

J. *Organization Structure of the Foundation*. The organizational structure of the Foundation is set forth in the Foundation's Articles of Incorporation which are attached hereto as Exhibit "E" and the Foundation's By-Laws dated January 30, 2009, which are attached at Exhibit "F." The Foundation agrees to provide copies of such Articles and By-Laws as well as any subsequent amendments to such documents to the University. Any such amendments to the Articles and By-Laws shall be attached hereto as additions to Exhibit "E" and Exhibit "F", respectively.

K. *Conflicts of Interest.* The Foundation has adopted a written policy addressing the manner the Foundation will address conflict of interest situations. The Foundation's Conflict of Interest Policy is attached hereto as Exhibit "G."

ARTICLE V

FOUNDATION RELATIONSHIPS WITH THE UNIVERSITY

A. *Access to Records.* The University shall have reasonable access to the financial records of the Foundation upon permission granted by the Foundation from time to time, which shall not be unreasonably withheld. All access by the University of such records shall be made in accordance with applicable laws, Foundation policies, and guidelines. In addition, upon request of the Foundation, the University shall execute a proprietary and confidentiality agreement and instruct its agents and employees that all confidential information of the Foundation shall be protected from disclosure. Except as specifically authorized under this agreement or the applicable proprietary and confidentiality agreement between the University and the Foundation, the University's access shall not include donor specific data of the Foundation such that would provide individually identifiable information about donors or their donations made to the Foundation.

B. *Records Management.*

1. The University acknowledges that in most cases the University is the primary recipient and depository of confidential donor information. The Parties recognize, however, that the records of the Foundation relating to actual or potential donors contain confidential information. Such records shall be kept by the Foundation in such a manner as to protect donor confidentiality to the fullest extent allowed by law. Notwithstanding the access to records permitted above, access to such confidential information by the University shall be limited to the University's President and any designee of the University's President. The donor database and all other data, materials and information of the Foundation and the University pertaining to past, current or prospective donors, are proprietary to the Foundation and the University respectively and constitute confidential information and trade secrets. The Foundation and University shall take the steps necessary to monitor and control access to the donor database and to protect the security of computer servers and software relevant to the database, in each case to the extent that these systems are in their respective control.

2. The Foundation shall be responsible for maintaining all permanent records of the Foundation including but not limited to the Foundation's Articles, By-Laws and other governing documents, all necessary documents for compliance with IRS regulations, all gift instruments, and all other Foundation records as required by applicable laws.

3. The Foundation's Board of Directors shall foster an atmosphere of openness in its operations, consistent with the prudent conduct of its business. The parties understand that the Foundation is not a public agency or a governing body as defined in the

Idaho Code and the Idaho Open Meeting Law and Access to Public Records Statutes. Nothing in this Operating Agreement shall be construed as a waiver of the Foundation's right to assert exemption from these statutes.

C. *Name and Marks*. Each Party hereby is granted a general, non-exclusive, royalty-free license to use the corporate name of the other, specifically: "The University of Idaho" and "The University of Idaho Foundation" and "The University of Idaho Foundation, Inc." in all activities conducted in association with or for the benefit of the other. Use of the other Party's name must be in manner that clearly identifies the Parties as separate entities, and neither Party may use the other Party's name to imply approval or action of the other Party. Neither Party may delegate, assign, or sublicense the rights granted hereunder without express written consent from the other Party. This license does not extend to any identifying marks of either Party other than the specified corporate name. Use of other marks must receive prior written approval.

D. *Identification of Source*. The Foundation shall be clearly identified as the source of any correspondence, activities and advertisements emanating from the Foundation.

E. *Establishing the Foundation's Annual Budget*. The Foundation shall provide the University with the Foundation's proposed annual operating budget and capital expenditure plan (if any) prior to the date the Foundation's Board of Directors meeting at which the Foundation's Board of Directors will vote to accept such operating budget. Any of the University's funding requests to the Foundation shall be communicated in writing by the President of the University to the Foundation's Treasurer by April 1 of each year.

F. *Attendance of the University's President at Foundation's Board of Director Meetings*. The Foundation may invite the University's President to attend meetings of the Foundation's Board of Directors and may act in an advisory capacity in such meetings.

G. *Supplemental Compensation of University Employees*. No University employee shall receive direct payments, compensation, or other benefits from the Foundation, provided that the Foundation may pay for those benefits which are necessary for its normal course of operation, including, but not limited to, travel and continuing professional education. Any such payment must be paid by the Foundation to the University and the University shall then pay or reimburse the employee in accordance with the University's normal practice. No University employee shall receive any payments or other benefits directly from the Foundation.

ARTICLE VI

AUDITS AND REPORTING REQUIREMENTS

A. *Fiscal Year*. The Foundation and the University shall have the same fiscal year.

B. *Annual Audit*. The Foundation shall have an annual financial audit conducted in accordance with Government Accounting Standards Board or Financial Accounting Standards

Board principles as appropriate. The audit shall be conducted by an independent certified public accountant who is not a director or officer of the Foundation. Such audit shall be conducted at the same or similar time as the University audit and shall be reported to the Foundation's Board of Directors. Such audit reports shall contain the Foundation's financial statements and the auditor's independent opinion regarding such financial statements. All such reports and any accompanying documentation shall protect donor privacy to the extent allowable by law.

C. *Separate Audit Rights.* The University agrees that the Foundation, at its own expense, may at any time during normal business hours conduct or request additional audits or reviews of the University's books and records pertinent to the expenditure of donated funds. The Foundation agrees that the University, at its own expense, may, at reasonable times, inspect and audit the Foundation's financial books and accounting records in accordance with Article V, A above.

D. *Annual Reports to University President.* Upon request, the Foundation shall provide a written report to the University President setting forth the following items:

1. the annual financial audit report;

2. an annual report of Foundation transfers made to the University, summarized by University department;

3. an annual report of unrestricted funds received by the Foundation;

4. an annual report of unrestricted funds available for use during the current fiscal year;

5. a list of all of the Foundation's officers, directors, and employees;

6. a list of University employees for whom the Foundation made payments to the University for approved purpose during the fiscal year, and the amount and nature of each payment;

7. a list of all state and federal contracts and grants managed by the Foundation;

8. an annual report of the Foundation's major activities;

9. an annual report of each real estate purchase or material capital lease, investment, or financing arrangement entered into during the preceding Foundation fiscal year for the benefit of the University; and

10. an annual report of any actual litigation involving the Foundation during its fiscal year, identification of legal counsel used by the Foundation for any purpose during such

year, and identification of any potential or threatened litigation involving the Foundation limited to the extent necessary to protect attorney-client privilege and litigation strategy.

ARTICLE VII

CONFLICT OF INTEREST AND CODE OF ETHICS AND CONDUCT

A. *Conflicts of Interest Policy Statement.* The Foundation has adopted a written policy addressing the manner the Foundation will address conflict of interest situations. The Foundation's Conflict of Interest Policy is attached hereto as Exhibit "G."

B. *Dual Representation.* Under no circumstances may a University employee represent both the University and the Foundation in any negotiation, sign for both Parties in transactions, or direct any other University employee under their immediate supervision to sign for the related Party in a transaction between the University and the Foundation. This shall not, however, prohibit University employees from drafting transactional documents that are subsequently provided to the Foundation for the Foundation's independent review, approval and use.

C. *Contractual Obligation of University.* The Foundation shall not enter into any contract that would impose a financial or contractual obligation on the University without first obtaining the prior written approval of the University. University approval of any such contract shall comply with policies of the State Board with respect to the State Board's approval of University contracts.

D. *Acquisition or Development or Real Estate.* The Foundation shall not acquire or develop real estate for the University's use or otherwise build facilities for the University's use unless the University first obtains the approval of the State Board. In the event of a proposed purchase of real estate for such purposes by the Foundation, the University shall notify the State Board, at the earliest possible date, of such proposed purchase for such purposes. Furthermore, any such proposed purchase of real estate for the University's use shall be a coordinated effort of the University and the Foundation. Any notification by the University to the State Board required pursuant to this Section may be made through the State Board's chief executive officer in executive session pursuant to Idaho Code Section 67-2345(1)(c).

ARTICLE VIII

GENERAL TERMS

A. *Effective Date.* This Agreement shall be effective on the date set forth above.

B. *Right to Terminate.* This Operating Agreement shall terminate upon the mutual written agreement of both Parties. In addition, either Party may, upon 90 days prior written notice to the other, terminate this Operating Agreement, and either Party may terminate this Operating Agreement in the event the other Party defaults in the performance of its obligations and fails to cure the default within 30 days after receiving written notice from the non-defaulting Party specifying the nature of the default. Should the University choose to terminate this Operating Agreement by providing 90 days written notice or in the event of a default by the Foundation that is not cured within the time frame set forth above, the Foundation may require the University to pay, within 180 days of written notice, all debt incurred by the Foundation on the University's behalf including, but not limited to, lease payments, advanced funds, and funds borrowed for specific initiatives. Should the Foundation choose to terminate this Operating Agreement by providing 90 days written notice or in the event of a default by the University that is not cured within the time frame set forth above, the University may require the Foundation to pay any debt it holds on behalf of the Foundation in like manner. The Parties agree that in the event this Operating Agreement shall terminate, they shall cooperate with one another in good faith to negotiate a new agreement within six (6) months. In the event negotiations fail, the Parties will initiate the Dispute Resolution mechanism described below (through reference to the Foundation's Chairman and the State Board) to further attempt to negotiate a new agreement. Termination of this Operating Agreement shall not constitute or cause dissolution of the Foundation.

C. *Dispute Resolution.* The Parties agree that in the event of any dispute arising from this Operating Agreement, they shall first attempt to resolve the dispute by working together with the appropriate staff members of each of the Parties. If the staff cannot resolve the dispute, then the dispute will be referred to the Foundation's Chairman and the University's President. If the Foundation's Chairman and University's President cannot resolve the dispute, then the dispute will be referred to the Foundation's Chairman and the State Board for resolution. If the dispute is not resolved by the aforementioned Parties, the University and the Foundation shall submit the dispute to mediation by an impartial third party or professional mediator mutually acceptable to the Parties. If and only if all the above mandatory steps are followed in sequence and the dispute remains unresolved, then, in such case, either Party shall have the right to initiate litigation arising from this Operating Agreement. In the event of litigation, the prevailing Party shall be entitled, in addition to any other rights and remedies it may have, to reimbursement for its expenses, including court costs, attorney fees, and other professional expenses.

D. *Dissolution of Foundation.* Upon dissolution of the Foundation, it shall transfer the balance of all property and assets of the Foundation in a manner consistent with its Articles of Incorporation, which state that in the event of dissolution of the Foundation, "no member, director, officer, or individual shall be entitled to or receive any distribution or division of its remaining assets, property or proceeds, and the balance of all property and assets of the [Foundation] from any source, after the payment of all debts and obligations of the [Foundation], shall be vested in the Board of Regents of the University of Idaho in trust for the use and benefit of the University. Any such assets not disposed of shall be distributed for one or more exempt purposes within the meaning of Section 501(c)(3) of the Internal Revenue Code, or shall be distributed to the federal government, or to a state or local government, for a public purpose."

E. *Board Approval of Operating Agreement.* Prior to the Parties' execution of this Operating Agreement, an unexecuted copy of this Operating Agreement must be approved by the State Board. Furthermore, this Operating Agreement, including any subsequent modifications and restatements of this Operating Agreement, shall be submitted to the State Board for review and approval no less frequently than once every two (2) years or more frequently if otherwise requested by the State Board.

F. *Modification.* Any modification to the Agreement or Exhibits hereto shall be in writing and signed by both Parties.

G. *Providing Document to and Obtaining Approval from the University.* Unless otherwise indicated herein, whenever documents are to be provided to the University or whenever the University's approval of any action is required, such documents shall be provided to, or such approval shall be obtained from, the University's President or an individual to whom such authority has been properly delegated by the University's President.

H. *Providing Documents to and Obtaining Approval from the Foundation.* Unless otherwise indicated herein, whenever documents are to be provided to the Foundation or whenever the Foundation's approval of any action is required, such document shall be provided to, or such approval shall be obtained from, the Foundation's Board of Directors or an individual to whom such authority has been properly delegated by the Foundation's Board of Directors.

I. *Notices.* Any notices required under this agreement may be mailed or delivered as follows:

To the University:

President of the University of Idaho
University of Idaho
P.O. Box 443151
Administration Building Room 105
Moscow, Idaho 83844-3151

To the Foundation:

Executive Director
University of Idaho Foundation, Inc.
714 W. State Street, Suite 240
Boise, Idaho 83702

J. *No Joint Venture.* At all times and for all purposes of this Operating Agreement, the University and the Foundation shall act in an independent capacity and not as an agent or representative of the other Party.

K. *Liability.* The University and Foundation are independent entities and neither shall be liable for any of the other's contracts, torts, or other acts or omissions, or those of the other's trustees, directors, officers, members or employees.

L. *Indemnification.* The University and the Foundation each agree to indemnify, defend and hold the other Party, their officers, directors, agents and employees harmless from and against any and all losses, liabilities, and claims, including reasonable attorney's fees arising out of or resulting from the willful act, fault, omission, or negligence of the Party, its employees, contractors, or agents in performing its obligations under this Operating Agreement. This indemnification shall include, but not be limited to, any and all claims arising from an employee of one Party who is working for the benefit of the other Party. Nothing in this Operating Agreement shall be construed to extend to the University's liability beyond the limits of the Idaho Tort Claims Act, Idaho Code Sections 6-901 et seq.

M. *Assignment.* This Agreement is not assignable by either Party, in whole or in part.

N. *Governing Law.* This Agreement shall be governed by the laws of the State of Idaho.

O. *Articles, Sections, Subsections and Subparagraphs.* This Agreement consists of text divided into Articles that are identified by roman numeral (for example Article I), Sections that are identified by an uppercase letter followed by a period (for example A.), subsections that are identified by a number followed by a period (for example 1.) and subparagraphs that are identified by a lower case letter followed by a period (for example a.). The organization is hierarchical meaning that a reference to a division of the document includes all of its subsections (for example a reference to a Section includes the Section and all of its subsections and subparagraphs).

P. *Severability.* If any provision of this Agreement is held invalid or unenforceable to any extent, the remainder of this Agreement is not affected thereby and that provision shall be enforced to the greatest extent permitted by law.

Q. *Entire Agreement.* This Agreement constitutes the entire agreement among the Parties pertaining to the subject matter hereof, and supersedes all prior agreements and understandings pertaining thereto.

IN WITNESS WHEREOF, the University and the Foundation have executed this agreement on the above specified date.

University of Idaho

By: M. Duane Nellis
Its: President

University of Idaho Foundation, Inc.

By: Deaner J. Ellsworth
Its: Chairman

University of Idaho Foundation, Inc. Cash Management Investment Policy

Purpose
To establish a policy for the regular investment of monetary assets of the University of Idaho Foundation, Inc. (Foundation). For this purpose monetary assets means cash and other liquid monetary assets not specifically held in other accounts by the Foundation.

Objective
To provide guidance for the investment of monetary assets of the Foundation to ensure they are invested in a high-quality portfolio of investments which (in order of priority):

- Provides for the safety and preservation of capital and is consistent with conservative investment principles.
- Meets the Foundation's liquidity needs.
- Provides competitive total return in relationship to these guidelines, market conditions, and tax status of the Foundation.

Scope
This policy does not apply to assets that are specifically invested by the Foundation with the oversight of the Investment Committee, such as assets held in the Consolidated Investment Trust (CIT) or assets held by Charitable Trusts and Gift Annuity Pools. This also does not apply to any special investments undertaken by the Board of Directors.

Policy Guidelines

1. **Responsibility**
    - The Finance Committee has responsibility to approve the Policy and any amendments to the Policy.
    - The Finance Committee will review at least quarterly the compliance and performance status of the portfolio.
    - The Finance Committee shall approve any modifications to authorized Investment Guidelines, which limits are initially establish in Table A
    -

2. **Investment Managers**
    An external manager that meets the following criteria may be hired.

    - They must be a Registered Investment Advisor under the Investment Company Act of 1940, as amended, and provide a SEC proof of registration in a Form ADV Part 2 updated at least annually.
    - Maintain professional Errors & Omissions insurance covering any damages caused by an error, omission or negligent acts of the Manager, its agents, officers or employees, in an amount not less than $5 million.
    - Agree to abide by the terms of this Policy.

- Meet ongoing performance, operational, reporting, and value added services, reviewed on a quarterly basis.
- Provide detailed reporting within five business days following the Foundation month end. This reporting shall include, but is not limited to, the following:
  - A summary of the portfolio performance for the current period
  - A comparison of Manager total rate of return against the assigned benchmark.
  - Notification that the portfolio is in compliance with the Investment Policy and guideline.

3. **Custody of Assets**
Custody of the Foundation's investment assets (other than money market funds) will be maintained to the extent practicable by a single master custodian designated by the Foundation.

4. **Review of Investment Management Policy**
This Investment Management Policy will be reviewed and approved at least annually to ensure that it remains consistent with the overall investment objectives of the Foundation and current financial trends. The Policy may be reviewed and updated more frequently if conditions dictate.

INSERT TABLE

Ineligible Securities

The following list of security types are prohibited: non-agency mortgage-backed securities (non-agency MBS), Auction-Rate Securities (ARS), Structured Investment Vehicles (SIV), Asset-Backed Commercial Paper (ABCP), Extendible Notes, subordinated debt, futures, options, and other investments that utilize leverage, structured securities that are not explicitly listed as eligible in Table A, obligations with embedded options excepting those with a make-whole call provision. All other securities not explicitly listed in Table A.

WAL –Weighted Average Life

For purposes of determining the maturity date of agency MBS, ABS or other allowed securities with pre-payment characteristics, weighted-average life (WAL) will be used. WAL shall be determined using reasonable market standards and models.

Currency

Only assets denominated in U.S. dollars are permitted for the account. Non-U.S. dollar investment, even if considered hedged, are prohibited.

Liquidity

All holdings must have adequate liquidity to allow for prompt sale at minimum cost. Specific limits are listed in Table A.

Split-rated Securities

All securities shall be rated by two nationally recognized statistical rating organizations. In the case of a split rating, the lower rating shall be used for purposes of compliance with the Policy.

Issuer Concentration

Shall be determined using the ultimate parent company where reasonably reported by Bloomberg. If an issuer's ultimate parent company is not reported by Bloomberg or the reported parent is not the party ultimately responsible fore payment of interest and principal (asset-based collateral pools), that determination shall be made and agreed upon by the Manager and the Foundation.

Credit Downgrades

In the event a credit rating of a security in the portfolio is downgraded by a rating organization, the Manager shall notify the Foundation within 3 business days with a recommended course of action.

Violations

Any security or action that falls outside of the Policy shall be deemed a violation unless written authorization is given by the Foundation. Once the Manager becomes aware of a violation in the portfolio, the Manager shall notify the Foundation and provide a recommended course of action.

Table A - Cash Management Investment Policy Guidelines

Eligible Securities	Description	Issuer Concentration Limit*	Maturity Limit*	Minimum Rating*	Asset Class Concentration Limit*
Government					
	Securities explicitly backed by the full faith and credit of the US Government	100%	5 years	N/A	100%
	US Federal Agencies and Government Sponsored Enterprises	30%	5 years	AA/Aa	100%
	Sovereign, Quasi-Sovereign, and Supranational	5%	5 years	A+/A1	25%
Corporate Securities					
	US and foreign commercial paper including private placement, CDs, ECDs, Deposit Notes, Banker's Acceptances, Bank Notes, Time Deposits.	5%	398 days	A1/P1 or A3/A- as applicable	50%
	A2/P2 Commercial Paper Limit	5%	398 days		10%
	Bonds, notes, MTNs, FRNs, including 144As and bank issuers	5%	5 years	Baa2/BBB	75%
Repurchase Agreements					
	All repos's must be collateralized by at least 102% US Treasuries and US Agencies. No other collateral is acceptable.		30 days		50%
	Counterparty Exposure	5%	30 days	A+/A1	50%
Other Securities					
	Mortgage-Backed Securities. Agency MBS only	5%	60 months (WAL)*	AA/Aa	50%
	Asset-Backed Securities. Credit cards, auto receivable, prime collateral, and senior tranches only.	5%	4.0 years (WAL)*	AAA/Aaa	20%
	Municipal debt obligations	0%			0%
	Money Market Funds	10%	Rule 2A-7	Rule 2A-7	100%
Market Sector Limits	Description	Concentration Limit*			
	Financial Sector	50%			
	Industrial Sector	50%			
	Utility Sector	30%			
Portfolio Limits	Description	Limit			
	Average duration maximum	4 years			
	Average credit rating minimum	A/A2			
	Currency denomination	USD			
	Corporate bonds/notes minimum issue size	$200mm			
	Municipal bonds/notes minimum issue size	N/A			
	Realized loss per quarter maximum				
	Maximum percentage of any Money Market Fund	5%			

* At time of purchase

University of Idaho Foundation, Inc.

Policy: Cash Management

Section: Investment

Number: 2

Recording Date: 6/07/2010

Committee: Investment Committee

Article I. Purpose

To establish a policy for the regular investment of monetary assets of the University of Idaho Foundation, Inc. (Foundation). For this purpose monetary assets means cash and other liquid monetary assets not specifically held in other accounts by the Foundation.

Article II. Objective

To provide guidance for the investment of monetary assets of the Foundation to ensure they are invested in a high-quality portfolio of investments which (in order of priority):

- Provides for the safety and preservation of capital and is consistent with conservative investment principles.
- Meets the Foundation's liquidity needs.
- Provides competitive total return in relationship to these guidelines, market conditions, and tax status of the Foundation.

Article III. Scope

This policy does not apply to assets that are specifically invested by the Foundation with the oversight of the Investment Committee, such as assets held in the Consolidated Investment Trust (CIT) or assets held by Charitable Trusts and Gift Annuity Pools. This also does not apply to any special investments undertaken by the Board of Directors.

Article IV. Policy Guidelines

1. Responsibility

- The Finance Committee has responsibility to approve the Policy and any amendments to the Policy.
- The Finance Committee will review at least quarterly the compliance and performance status of the portfolio.
- The Finance Committee shall approve any modifications to authorized Investment Guidelines, which limits are initially establish in Table A
-

2. Investment Managers

An external manager that meets the following criteria may be hired.

- They must be a Registered Investment Advisor under the Investment Company Act of 1940, as amended, and provide a SEC proof of registration in a Form ADV Part 2 updated at least annually.
- Maintain professional Errors & Omissions insurance covering any damages caused by an error, omission or negligent acts of the Manager, its agents, officers or employees, in an amount not less than $5 million.
- Agree to abide by the terms of this Policy.
- Meet ongoing performance, operational, reporting, and value added services, reviewed on a quarterly basis.
- Provide detailed reporting within five business days following the Foundation month end. This reporting shall include, but is not limited to, the following:
    - A summary of the portfolio performance for the current period
    - A comparison of Manager total rate of return against the assigned benchmark.
    - Notification that the portfolio is in compliance with the Investment Policy and guideline.

3. **Custody of Assets**

Custody of the Foundation's investment assets (other than money market funds) will be maintained to the extent practicable by a single master custodian designated by the Foundation.

4. **Review of Investment Management Policy**

This Investment Management Policy will be reviewed and approved at least annually to ensure that it remains consistent with the overall investment objectives of the Foundation and current financial trends. The Policy may be reviewed and updated more frequently if conditions dictate.

Table A - Cash Management Investment Policy Guidelines

Eligible Securities	Description	Issuer Concentration Limit*	Maturity Limit*	Minimum Rating*	Asset Class Concentration Limit*
Government					
	Securities explicitly backed by the full faith and credit of the US Government	100%	3 years	N/A	100%
	US Federal Agencies and Government Sponsored Enterprises	30%	3 years	AAA/Aaa	100%
	Sovereign, Quasi-Sovereign, and Supranational	5%	3 years	A+/A1	25%
Corporate Securities					
	US and foreign commercial paper including private placement, CDs, ECDs, Deposit Notes, Banker's Acceptances, Bank Notes, Time Deposits.	5%	398 days	A1/P1 or A-/A3 as applicable	50%
	Bonds, notes, MTNs, FRNs, including 144As and bank issuers	5%	3 years	A+/A1	75%
Repurchase Agreements					
	All repos's must be collateralized by at least 102% US Treasuries and US Agencies. No other collateral is acceptable.		30 days		50%

	Counterparty Exposure	5%	30 days	A+/A1	50%
Other Securities					
	Mortgage-Backed Securities. Agency MBS only	5%	20 months (WAL)	AAA/Aaa	50%
	Asset-Backed Securities. Credit cards, auto receivable, prime collateral, and senior tranches only.	0%			0%
	Municipal debt obligations	0%			0%
	Money Market Funds	10%	Rule 2A-7	Rule 2A-7	100%
Market Sector Limits	Description	Concentration Limit*			
	Financial Sector	30%			
	Industrial Sector	30%			
	Utility Sector	20%			
Portfolio Limits	Description	Limit			
	Average duration maximum	2 years			
	Average credit rating minimum	AA/Aa2			
	Currency denomination	USD			
	Corporate bonds/notes minimum issue size	$200mm			
	Municipal bonds/notes minimum issue size	N/A			
	Asset-Backed Securities minimum tranche size	$100mm			
	Realized loss per quarter maximum				
	Maximum percentage of any Money Market Fund	5%			

* At time of purchase

Ineligible Securities

The following list of security types are prohibited: non-agency mortgage-backed securities (non-agency MBS), Auction-Rate Securities (ARS), Structured Investment Vehicles (SIV), Asset-Backed Commercial Paper (ABCP), Extendible Notes, subordinated debt, futures, options, and other investments that utilize leverage, structured securities that are not explicitly listed as eligible in Table A, obligations with embedded options excepting those with a make-whole call provision. All other securities not explicitly listed in Table A.

WAL –Weighted Average Life

For purposes of determining the maturity date of agency MBS, ABS or other allowed securities with pre-payment characteristics, weighted-average life (WAL) will be used. WAL shall be determined using reasonable market standards and models.

Currency

Only assets denominated in U.S. dollars are permitted for the account. Non-U.S. dollar investment, even if considered hedged, are prohibited.

Liquidity

All holdings must have adequate liquidity to allow for prompt sale at minimum cost. Specific limits are listed in Table A.

Split-rated Securities

All securities shall be rated by both S&P and Moody's. In the case of a split rating, the lower rating shall be used for purposes of compliance with the Policy.

Issuer Concentration

Issuer concentration shall be determined using the ultimate parent company where reasonably reported by Bloomberg. If an issuer's ultimate parent company is not reported by Bloomberg or the reported parent is not the party ultimately responsible for payment of interest and principal (asset-based collateral pools), that determination shall be made and agreed upon by the Manager and the Foundation.

Credit Downgrades

In the event a credit rating of a security in the portfolio is downgraded by S&P or Moody's, the Manager shall notify the Foundation within 3 business days with a recommended course of action.

Violations

Any security or action that falls outside of the Policy shall be deemed a violation unless written authorization is given by the Foundation. Once the Manager becomes aware of a violation in the portfolio, the Manager shall notify the Foundation and provide a recommended course of action.

Exhibit G

UIF Conflicts of Interest Policy

CONFLICT OF INTEREST POLICY OF THE UNIVERSITY OF IDAHO FOUNDATION, INC.

ARTICLE I
Purpose

The purpose of this conflict of interest policy is to protect The University of Idaho Foundation, Inc.'s (the "Foundation") interest when it is contemplating entering into a transaction or arrangement that might benefit the private interest of a director, officer or employee of the Foundation or might result in a possible excess benefit transaction. This policy is intended to supplement but not replace any applicable state and federal laws governing conflict of interest applicable to nonprofit and charitable organizations. Another purpose of this conflict of interest policy is to set forth a Code of Conduct and Ethics to guide the directors, principal officers and employees of the Foundation in the performance of their duties and the operation of the Foundation.

ARTICLE II
Definitions

1. <u>Interested Person</u>. Any director, principal officer, member of a committee with governing board delegated powers, or employee of the Foundation who has a direct or indirect financial interest, as defined below, is an interested person.

2. <u>Financial Interest</u>. A person has a financial interest if the person has, directly or indirectly, through business, investment, or family (including such person's spouse, ancestors, lineal descendants and spouses of lineal descendants):

a. An ownership or investment interest in any entity with which the Foundation has a transaction or arrangement,

b. A compensation arrangement with the Foundation or with any entity or individual with which the Foundation has a transaction or arrangement, or

c. A potential ownership or investment interest in, or compensation arrangement with, any entity or individual with which the Foundation is negotiating a transaction or arrangement.

Compensation includes direct and indirect remuneration as well as material gifts or gratuities in excess of fifty dollars ($50).

A financial interest is not necessarily a conflict of interest. Under Article III, Section 2, a person who has a financial interest may have a conflict of interest only if the appropriate governing board or committee decides that a conflict of interest exists.

ARTICLE III
Procedures

1. Duty to Disclose. In connection with any actual or possible conflict of interest, an interested person must disclose the existence of the financial interest and be given the opportunity to disclose all material facts to the directors and members of committees with governing board delegated powers considering the proposed transaction or arrangement.

2. Determining Whether a Conflict of Interest Exists. After disclosure of the financial interest and all material facts, and after any discussion with the interested person, he/she shall leave the governing board or committee meeting while the determination of a conflict of interest is discussed and voted upon. The remaining board or committee members shall decide if a conflict of interest exists.

3. Procedures for Addressing the Conflict of Interest.

a. An interested person may make a presentation at the governing board or committee meeting, but after the presentation, he/she shall leave the meeting during the discussion of, and the vote on, the transaction or arrangement involving the possible conflict of interest.

b. The chairperson of the governing board or committee shall, if appropriate, appoint a disinterested person or committee to investigate alternatives to the proposed transaction or arrangement.

c. After exercising due diligence, the governing board or committee shall determine whether the Foundation can obtain with reasonable efforts a more advantageous transaction or arrangement from a person or entity that would not give rise to a conflict of interest.

d. If a more advantageous transaction or arrangement is not reasonably possible under circumstances not producing a conflict of interest, the governing board or committee shall determine by a majority vote of the disinterested directors whether the transaction or arrangement is in the Foundation's best interest, for its own benefit, and whether it is fair and reasonable. In conformity with the above determination it shall make its decision as to whether to enter into the transaction or arrangement.

4. Violations of the Conflict of Interest Policy.

a. If the governing board or committee has reasonable cause to believe a director, principal officer or employee has failed to disclose an actual or possible conflict of interest, it shall inform the director, principal officer or employee of the basis for such belief and afford such person an opportunity to explain the alleged failure to disclose.

b. If, after hearing such person's response and after making further investigation as warranted by the circumstances, the governing board or committee determines the director, principal officer or employee has failed to disclose an actual or possible conflict of interest, it shall take appropriate disciplinary and corrective action.

ARTICLE IV
Records of Proceedings

The minutes of the governing board and all committees with board delegated powers shall contain:

a. The names of the persons who disclosed or otherwise were found to have a financial interest in connection with an actual or possible conflict of interest, the nature of the financial interest, any action taken to determine whether a conflict of interest was present, and the governing board's or committee's decision as to whether a conflict of interest in fact existed.

b. The names of the persons who were present for discussions and votes relating to the transaction or arrangement, the content of the discussion, including any alternatives to the proposed transaction or arrangement, and a record of any votes taken in connection with the proceedings.

ARTICLE V
Compensation

a. A voting member of the governing board who receives compensation, directly or indirectly, from the Foundation for services is precluded from voting on matters pertaining to that member's compensation.

b. A voting member of any committee whose jurisdiction includes compensation matters and who receives compensation, directly or indirectly, from the Foundation for services is precluded from voting on matters pertaining to that member's compensation.

c. No voting member of the governing board or any committee whose jurisdiction includes compensation matters and who receives compensation, directly or indirectly, from the Foundation, either individually or collectively, is prohibited from providing information to any committee regarding compensation.

ARTICLE VI
Code of Ethics and Conduct

Each director, principal officer, member of a committee with governing board delegated powers and employee of the Foundation shall be provided with and abide by the Code of Ethics and Conduct attached hereto as Exhibit "A" (hereinafter referred to as the "Code").

ARTICLE VII
Annual Statements

Each director, principal officer, member of a committee with governing board delegated powers and employee shall sign a statement which affirms such person:

a. Has received a copy of the conflict of interest policy and the Code,

b. Has read and understands the conflict of interest policy and the Code,

c. Has agreed to comply with the conflict of interest policy and the Code, and

d. Understands the Foundation is charitable and in order to maintain its federal tax exemption it must engage primarily in activities which accomplish one or more of its tax-exempt purposes.

ARTICLE VIII
Periodic Reviews

To ensure the Foundation operates in a manner consistent with charitable purposes and does not engage in activities that could jeopardize its tax-exempt status, periodic reviews shall be conducted. The periodic reviews shall, at a minimum, include the following subjects:

a. Whether compensation arrangements and benefits are reasonable, based on competent survey information, and the result of arm's length bargaining.

b. Whether partnerships, joint ventures, and arrangements with management organizations conform to the Foundation's written policies, are properly recorded, reflect reasonable investment or payments for goods and services, further charitable purposes and do not result in inurement, impermissible private benefit or in an excess benefit transaction.

ARTICLE IX
Use of Outside Experts

When conducting the periodic reviews as provided for in Article VIII, the Foundation may, but need not, use outside advisors. If outside experts are used, their use shall not relieve the governing board of its responsibility for ensuring periodic reviews are conducted.

CERTIFICATE OF ADOPTION

The foregoing was duly adopted as the Conflict of Interest Policy of the Foundation by the Board of Directors effective as of the 25 day of January, 2008.

Secretary of the Board of Directors

EXHIBIT "A" TO CONFLICT OF INTEREST POLICY

CODE OF CONDUCT AND ETHICS OF THE UNIVERSITY OF IDAHO FOUNDATION, INC.

ARTICLE I
Purpose

This Code of Conduct and Ethics ("Code") is designed to guide the directors, principal officers and employees of the University of Idaho Foundation, Inc. ("Foundation") in the performance of their duties and the operation of the Foundation. The tax-exempt status of the Foundation includes an obligation to maintain the public trust. The Foundation takes this obligation very seriously. Accordingly, it is incumbent upon directors, principal officers, and employees of the Foundation to conduct the affairs of the Foundation with a commitment to the highest standards of integrity. This includes acting at all times in an honest and ethical manner, in compliance with all laws and regulations and avoiding actual, potential or apparent conflicts of interest.

ARTICLE II
General Rules

This Code is applicable, unless otherwise indicated, to the conduct of all directors, principal officers and employees of the Foundation ("Foundation Personnel"). All Foundation Personnel owe the Foundation a duty of loyalty, and a duty to the Foundation to avoid conflicts, whether real, potential or apparent, between the interests of the Foundation and their personal financial interests. All Foundation Personnel must remain conscious of the potential for such conflicts, and act with candor and care in such situations. The Foundation's activities must be conducted according to the highest standards of objectivity and integrity and exclusively in furtherance of the Foundation's charitable purposes.

1. Conflict of Interest. The Foundation has developed a Conflict of Interest Policy. The purpose of the Conflict of Interest Policy is to protect the Foundation's interest when it is contemplating entering into a transaction or arrangement that might benefit the private interest of a director, officer or employee of the Foundation or may result in providing any such person with an improper benefit. The Conflict of Interest Policy defines those situations or circumstances which could create a real or perceived conflict of interest. Further, the policy establishes a method for ensuring disclosure and accountability. Foundation Personnel shall comply with the Foundation's Conflict of Interest Policy.

2. Gifts and Gratuities. Foundation Personnel shall not accept from any source any material gift or gratuity (including but not limited to gifts, payments, commissions, entertainment, services, loans, or promises of future benefits) in excess of fifty dollars ($50) that is offered, or reasonably appears to be offered, because of such person's position held with the Foundation; nor shall an offer of a prohibited gift or gratuity be extended by Foundation Personnel on a similar basis.

3. Confidentiality. Foundation Personnel are expected to exercise the utmost discretion in regard to all matters of Foundation business. They may not communicate any information known to them by reason of their position that has not been made public, except as may be necessary in the course of their duties or by authorization of the Board of Directors of the Foundation. Nor shall Foundation Personnel at any time use such information to private advantage. These obligations do not cease upon separation from the Foundation.

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BOISE STATE UNIVERSITY

SUBJECT

Multi-year contract with Gordon Presnell, Women's Head Basketball Coach

REFERENCE

February 2011	Board approved a two year employment agreement with Women's Head Basketball Coach Gordon Presnell
December 2014	Board approved a two-year and three-month employment agreement with Women's Head Basketball Coach Gordon Presnell

APPLICABLE STATUTE, RULE, OR POLICY

Idaho State Board of Education Governing Policies & Procedures, Section II.H.

BACKGROUND/DISCUSSION

Boise State University (BSU) is seeking a two-year and seven-month employment contract for the Head Women's Basketball Coach (Coach). In December 2014, the State Board of Education (Board) approved a two-year and three-month employment extension contract with Gordon Presnell as the Women's Head Basketball Coach. The contract included an automatic extension clause extending one year after each season the team reached eighteen (18) wins.

IMPACT

No state funds are used and these amounts are paid only from program revenue, media, donations and other non-appropriated funds. Terms are as follows:

Term:

Fixed term contract of two years and nine months, commencing on August 14, 2016 and terminating on March 31, 2019. The contract will be automatically extended by one additional year commencing on April 1 and concluding on March 31 for each season in which the team has at least 18 wins.

Base Compensation:

$220,000 per year with a one-time bonus payment of $3,875.

Pay for Performance – Academic:

Academic incentive pay may be earned if annual team APR ranks nationally within women's basketball above the 50th percentile as follows:

National Rank (percentile) within Sport:

50th - 59.9%	$5,000
60th - 69.9%	$7,500
70th - 79.9%	$10,000
80th % or above	$12,500

Pay for Performance – Athletic:

The greatest of the following:

11 conference wins	$2,000
12 conference wins	$3,000
13 conference wins	$4,000
14+ conference wins	$7,500
Conference Regular Season Champions	$12,500

The greater of the following two:

Conference Tournament Finalist	$3,000
Conference Tournament Champions	$12,500

NCAA Tournament Appearance	$5,000 per game
WNIT Appearance	$3,000 per game
18 Wins	$6,000

Maximum potential annual compensation (base salary and incentive payments) is $298,500. In addition, the Coach may operate summer camps at BSU pursuant to the proposed agreement.

Buy-Out Provision: If the Coach terminates the agreement for convenience, the following liquidated damages will be due: $40,000 for the first year, $20,000 for the second year, or $10,000 for the third year.

The base pay in the employment agreement reflects a 12.93% increase over the Coach's current base salary. The maximum proposed incentive pay for academic achievement is $12,500, which is equal to the incentive amount for winning the conference championship. The proposed employment agreement is in substantial conformance with the Board's model contract and is similar to the standard issued by BSU for other coaches.

ATTACHMENTS

STAFF COMMENTS AND RECOMMENDATIONS

Board Policy II.H. requires coach contracts with a term longer than three (3) years or with a total compensation amount of $200,000 or more be approved by the Board. The proposed employment agreement potential rolling duration exceeds three years and its total annual compensation amount exceeds $200,000 per year. The terms of the contract are aligned with Board policy and guidance and compare reasonably in terms of compensation level, bonus options, and liquidated damages provisions with those of Women's Basketball programs at similar institutions. Staff recommends approval.

BOARD ACTION

I move to approve the request by Boise State University to enter into a two-year, nine-month employment agreement with Gordon Presnell, Head Women's Basketball Coach, commencing on August 14, 2016 and terminating on March 31, 2019, at a base salary of $220,000 and supplemental compensation provisions, as submitted in Attachment 1.

Moved by____________Seconded by___________Carried Yes _____ No _____

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EMPLOYMENT AGREEMENT

This Employment Agreement (the "Agreement") is entered into by and between Boise State University (the "University") and Gordon H. Presnell ("Coach").

ARTICLE 1

1.1. Employment. Subject to the terms and conditions of this Agreement, the University shall employ Coach as the head coach (the "Position") of its intercollegiate Women's Basketball team (the "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 (the "Director") or the Director's designee. Coach shall abide by the reasonable instructions of the 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 (the "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. Coach shall, to the best of Coach's ability, and consistent with University policies and procedures, perform all duties and responsibilities customarily associated with the Position. 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 two (2) years seven (7) months, commencing on August 14, 2016 and terminating without further notice to Coach on March 31, 2019 (the "Term") unless sooner terminated in accordance with other provisions of this Agreement.

2.2 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 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.

2.3 Automatic Extensions. The term of this Agreement will automatically be extended by one (1) additional year commencing on April 1 and concluding on March 31 for each season in which the team has at least eighteen (18) wins. For the purpose of calculation of wins, such wins must occur during the regular season, the conference tournament, the Women's National Invitation Tournament ("WNIT"), or the National Collegiate Athletic Association ("NCAA") Tournament, to the exclusion of all other pre-season exhibition games or post-season tournaments.

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) A 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 Director and President and approved by the University's Board of Trustees;

b) A one-time bonus payment of $3,875, which shall be paid after execution of this Agreement;

c) The opportunity to receive such employee benefits calculated on the "base salary" set forth in set forth in section 3.1.1(a) as the University provides generally to non-faculty exempt employees; and

d) The opportunity to receive such employee benefits as the University's Department of Athletics (the "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. Coach may earn supplemental compensation as follows:

3.2.1 Athletic Achievement

a) The greatest of the following:

11 conference wins	$2,000
12 conference wins	$3,000
13 conference wins	$4,000
14+ conference wins	$7,500
Conference Regular Season Champions	$12,500

b)	The greater of the following two:	
	Conference Tournament Finalist	$3,000
	Conference Tournament Champions	$12,500
c)	NCAA Tournament Appearance	$5,000 per game
d)	WNIT Appearance	$3,000 per game
e)	18 Wins	$6,000

3.2.2 Academic Achievement

Academic Incentive Pay may be earned if annual team APR ranks nationally within women's basketball as follows:

National Rank Within Sport		
975-980	=	$5,000
981-985	=	$7,500
986-990	=	$10,000
991 or above	=	$12,500

3.2.3 Conditions for payment of Academic and Athletic supplemental compensation:

a. If Coach qualifies for Athletic Achievement Supplemental Compensation pursuant to section 3.2.1, University will pay Coach on the first regular pay date in July, following the year in which such supplemental compensation is calculated but only if Coach is still employed by the University on that date. Ranking shall be determined based on NCAA National End of Season Ranking.

b. If Coach qualifies for Academic Achievement Supplemental Compensation pursuant to section 3.2.2, it will be paid as soon as reasonably practical following APR rating determination and verification by the NCAA, if Coach is still employed by the University on that date.

c. In order to receive any of the 3.2.1 supplemental compensation, the Team's retention rate must be at least 50% for the academic year in which the supplemental pay is earned. The retention rate will be calculated anew each year and will not be cumulative.

3.2.4 Each year Coach may be eligible to receive supplemental compensation based on the overall development of the intercollegiate women's basketball program; ticket sales; fundraising; outreach by Coach to various constituency groups, including University 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 sole discretion of the President in consultation with the Director and approved by the University's Board of Trustees.

3.2.5 The Coach may receive compensation hereunder from 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 (collectively, "Programs
). 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, which are broadcast on radio or television that conflict with those broadcast on the University's designated media outlets.

3.2.6 Summer Camp Operated by the University. Coach agrees that the University has the exclusive right to operate youth basketball 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 basketball 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 summer basketball camps, the University shall pay Coach a reasonable supplemental compensation during each year of his employment as head coach at the University. The summer youth camp must be operated by Coach in a manner that reflects positively on the University and the Department. The Coach complies with all NCAA, Conference, and University rules and regulations related, directly or indirectly, to the operation of summer youth camps. All revenues and expenses of the Camp shall be deposited with and paid by the University.

In the event of termination of this Agreement, suspension, or reassignment, University 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 shall be released from all obligations relating thereto.

3.2.7 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 has the authority to enter into an agreement with a company 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 a product's design or performance, shall act as an instructor at a clinic sponsored in whole or in part by the University's designated company, or give a lecture at an event sponsored in whole or in part by said company, 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 basketball coach. In order to avoid entering into an agreement with a competitor of the University's designated company, 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 and will not participate in any messages or promotional appearances which contain a comparative or qualitative description of athletic footwear, apparel, or equipment products.

3.2.8 Away Game Guarantee. In the event the University schedules an away contest with a non-conference opponent for which a game guarantee is paid to the University by the host institution, the payment shall be distributed as follows: any amount of the game guarantee, will be split between (a) the Department and (b) the Coach and assistant coaches at the recommendation of Coach, subject to the Director's final approval.

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 of which the University is a member (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 University's Director of NCAA 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 will be provided periodically to Coach by the University. The applicable laws, policies, rules, and regulations include: (a) State Board of Education Governing Policies and Procedures and Rule Manual; (b) the University's Policy Manual; (c) the policies of the Department; (d) NCAA rules and regulations; and (e) the rules and regulations of the Conference.

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 Outside Income. In accordance with NCAA rules, Coach shall obtain prior written approval from the President and Director 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. 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. Sources of such income shall include, but are not limited to, the following: (a) income from annuities; (b) sports camps, clinics, speaking engagements, consultations, directorships, or related activities; (c) housing benefits (including preferential housing arrangements); (d) country club membership(s); (e) complimentary tickets (i.e., tickets to a Stampede game); (f) television and radio programs; (g) endorsement or consultation contracts with athletic shoe, apparel, or equipment manufacturers.

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 Trustees.

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 the Team's 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. Without first giving ten (10) days prior written notice to the Director, Coach shall not negotiate for or accept employment, under any circumstances, as a coach at any other institution of higher education or with any professional sports team requiring the performance of the duties set forth herein.

4.7 Specific Duties of Coach. The Coach is expected to devote full-time to coaching and recruitment involving the Team as the head coach. The Coach will attend all staff meetings, public relation functions, dinners, awards banquet and make appearances as directed by the Director unless excused by the Director. Such functions shall include, but are not limited to, the following:

a) The annual BAA barbecue
b) The weekly BAA function during the relevant season;
c) The annual BAA Endowment dinner;
d) The BSU Athletic Hall of Fame dinner;
e) The BAA Bronze Bronco Award banquet;
f) The BAA/Alumni Auction dinner;
g) All Department staff meetings called by the Director;
h) Athletic Department Graduation Reception;
i) Bronco Golf Series Tournaments.

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, regulations, and policies.

5.1.1 In addition to the definitions contained in applicable rules regulations, and policies, 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 thirty (30) days after written notice from the University;

c) A deliberate or major violation by Coach of any applicable law or the rules, regulations, or policies, 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 National Association of Intercollegiate Athletics ("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 by ordinary supervision of the violation and could have prevented it by such 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 Director's 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 "base salary amount 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 or until Coach obtains reasonably comparable employment, whichever occurs first, provided, however, in the event Coach obtains other employment 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 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 market 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 been represented by, or had the opportunity to be represented by 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.

5.2.4 In the event of non-renewal or termination of Coach's employment, Coach will use all accumulated annual leave prior to the end of the contract period.

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. Such termination must occur at a time outside the Team's season (including NCAA post-season competition) so as to minimize the impact on the program.

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 March 31, 2017, the sum of $40,000; (b) if the Agreement is terminated between April 1, 2017 and March 31, 2018 inclusive, the sum of $20,000; (c) if the Agreement is terminated between April 1, 2018 and March 16, 2019 inclusive, the sum of $10,000. 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 had opportunity to be represented by 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 terminated 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 and all accumulated leave.

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 provided for in the State Board of Education and Board Rule Manual (ID ADMIN. CODE 08.01.01 et seq) and Governing Policies and Procedures Manual, and the University Policies.

ARTICLE 6

6.1 Board Approval. This Agreement shall not be effective until and unless approved of 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, 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 Trustees and University's rules regarding financial exigency.

6.2 University Property. All personal property, 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 state district court in Ada County, Boise, 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 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 Boise State University 1910 University Drive Boise, Idaho 83725-1020
with a copy to:	Office of the President Boise State University 1910 University Drive Boise, Idaho 83725-1000
the Coach:	Gordon H. Presnell 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 between 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.

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. 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.

IN WITNESS WHEREOF, the parties agree to the terms and conditions of this Agreement and the incorporated documents attached hereto and have executed this Agreement freely and agree to be bound hereby as of the Effective Date.

UNIVERSITY		COACH	
______________________		______________________	
Robert Kustra, President	Date	Gordon H. Presnell	Date

Approved by the Board on the ___ day of ________, 20__.

~~(MODEL ATHLETICS CONTRACT)~~

EMPLOYMENT AGREEMENT

This Employment Agreement (the "Agreement~~)~~") is entered into by and between ~~____________________ (~~Boise State University (~~College)),~~the "University") and ~~____________________ (~~Gordon H. Presnell ("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 (the "Position") of its intercollegiate ~~(Sport)~~ Women's Basketball team (the "Team~~) (or Director of Athletics).~~"). Coach ~~(Director)~~ 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~~University's Director of Athletics (the "Director") or the Director's designee. Coach shall abide by the reasonable instructions of the Director or the ~~Director's~~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 Chief executive officer (Chief executive officer).~~University's President (the "President").

1.3. Duties. Coach shall manage and supervise the Team and shall perform such other duties in the ~~University (College)'s~~University's athletic program as the Director may assign and as may be described elsewhere in this Agreement. Coach shall, to the best of Coach's ability, and consistent with University policies and procedures, perform all duties and responsibilities customarily associated with the Position. 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 ~~______ (___~~two (2) years seven (7) months, commencing on ~~__________~~August 14, 2016 and terminating~~,~~ without further notice to Coach~~,~~ on ~~__________~~March 31, 2019 (the "Term") unless sooner terminated in accordance with other provisions of this Agreement.

~~2.2.~~ ~~Extension or~~ 2.2 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 ~~the~~University's Board of ~~Education~~Trustees. This Agreement in no way grants to Coach a claim to tenure in employment, nor shall Coach's service pursuant to this ~~agreement~~Agreement count in any way toward tenure at the University ~~(College)~~.

2.3 Automatic Extensions. The term of this Agreement will automatically be extended by one (1) additional year commencing on April 1 and concluding on March 31 for each season in which the team has at least eighteen (18) wins. For the purpose of calculation of wins, such wins must occur during the regular season, the conference tournament, the Women's National Invitation Tournament ("WNIT"), or the National Collegiate Athletic Association ("NCAA") Tournament, to the exclusion of all other pre-season exhibition games or post-season tournaments.

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) ~~a)~~ ~~An annual~~A salary of ~~$~~$220,000 per year, payable in biweekly installments in accordance with normal University ~~(College)~~ procedures, and such salary increases as may be determined appropriate by the Director and ~~Chief executive officer~~President and approved by the ~~University (College)'s~~University'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~~

b) A one-time bonus payment of $3,875, which shall be paid after execution of this Agreement;

c) The opportunity to receive such employee benefits calculated on the "base salary" set forth in set forth in section 3.1.1(a) as the University ~~(College)'s~~provides generally to non-faculty exempt employees; and

d) The opportunity to receive such employee benefits as the University's Department of Athletics (the "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. Coach may earn supplemental compensation as follows:

~~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) , and if Coach continues to be employed as University (College)'s head (Sport) coach 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 during the fiscal year in which the championship and (bowl or other post-season) eligibility are achieved. The University (College) shall determine the appropriate manner in which it shall pay Coach any such supplemental compensation.~~

~~3.2.2 Each year the Team is ranked in the top 25 in the (national rankings of sport's division) , and if Coach continues to be employed as University (College)'s head (Sport) coach as of the ensuing July 1st, the University (College) shall pay 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) shall determine the appropriate manner in which it shall pay Coach any such supplemental compensation.~~

3.2.1 ~~3.2.3~~ Athletic Achievement

a) The greatest of the following:

11 conference wins	$2,000
12 conference wins	$3,000
13 conference wins	$4,000
14+ conference wins	$7,500
Conference Regular Season Champions	$12,500

b) The greater of the following two:

Conference Tournament Finalist	$3,000
Conference Tournament Champions	$12,500

c) NCAA Tournament Appearance $5,000 per game

d) WNIT Appearance $3,000 per game

ATTACHMENT 2

e) 18 Wins $6,000

3.2.2 Academic Achievement

Academic Incentive Pay may be earned if annual team APR ranks nationally within women's basketball as follows:

National Rank Within Sport		
975-980	=	$5,000
981-985	=	$7,500
986-990	=	$10,000
991 or above	=	$12,500

3.2.3 Conditions for payment of Academic and Athletic supplemental compensation:

a. If Coach qualifies for Athletic Achievement Supplemental Compensation pursuant to section 3.2.1, University will pay Coach on the first regular pay date in July, following the year in which such supplemental compensation is calculated but only if Coach is still employed by the University on that date. Ranking shall be determined based on NCAA National End of Season Ranking.

b. If Coach qualifies for Academic Achievement Supplemental Compensation pursuant to section 3.2.2, it will be paid as soon as reasonably practical following APR rating determination and verification by the NCAA, if Coach is still employed by the University on that date.

c. In order to receive any of the 3.2.1 supplemental compensation, the Team's retention rate must be at least 50% for the academic year in which the supplemental pay is earned. The retention rate will be calculated anew each year and will not be cumulative.

3.2.4 Each year Coach ~~shall~~may 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 Chief executive officer in consultation with the Director. The determination shall be based on the following factors: the Academic Progress Rate set by the Board, 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)~~ women's basketball 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 ~~Chief executive officer~~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 sole discretion of the ~~Chief executive officer~~President in consultation with the Director and approved by the University's Board of Trustees.

3.2.5 The Coach ~~shall~~may receive ~~the sum of (amount or computation)~~ compensation hereunder from the ~~University (College) or the University (College)'s~~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). Coach's right to receive 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) .~~collectively, "Programs"). 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 are broadcast on radio or television that conflict with those broadcast on the ~~University (College)'s~~University's designated media outlets.

3.2.6 ~~**(SUMMER CAMP—OPERATED BY UNIVERSITY (COLLEGE))**~~Summer Camp Operated by the University. Coach agrees that the University ~~(College)~~ has the exclusive right to operate youth ~~(Sport)~~ basketball 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~~University's camps in ~~Coach's~~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~~University's basketball 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~~University's summer ~~football~~basketball camps, ~~–~~the University ~~(College)~~ shall pay Coach ~~_(amount)__ per year as~~a reasonable supplemental compensation during each year of his employment as head ~~(Sport)~~ coach at the University. The summer youth camp must be operated by Coach in a manner that reflects positively on the University ~~(College). This amount~~and the Department. The Coach complies with all NCAA, Conference, and University rules and regulations related, directly or indirectly, to the operation of summer youth camps. All revenues and expenses of the Camp shall be deposited with and paid ~~__(terms of payment)______~~by the University.

~~**(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 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 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~~the authority to enter into agreement with ~~(Company Name)~~ a company to supply the University ~~(College)~~ with athletic footwear, apparel and/or equipment. Coach agrees that, upon the ~~University (College)'s~~University's reasonable request, Coach will consult with appropriate parties concerning ~~an (Company Name)~~ a product's design or performance, shall act as an instructor at a clinic sponsored in whole or in part by ~~(Company Name)~~ the University's designated company, or give a lecture at an event sponsored in whole or in part by ~~(Company Name)~~ said company, 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)~~ basketball coach. In order to avoid entering into an agreement with a competitor of ~~(Company Name)~~ the University's designated company, 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),~~ and will not participate in any messages or promotional appearances which contain a comparative or qualitative description of athletic footwear, apparel, or equipment products.

3.2.8 Away Game Guarantee. In the event the University schedules an away contest with a non-conference opponent for which a game guarantee is paid to the University by the host institution, the payment shall be distributed as follows: any amount of the game guarantee, will be split between (a) the Department and (b) the Coach and assistant coaches at the recommendation of Coach, subject to the Director's final approval.

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~~University's governing board, the conference~~,~~ of which the University is a member (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~~University's Director of NCAA Compliance if Coach has reasonable cause to believe that any person or entity, including without limitation representatives of the ~~University (College)'s~~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 ~~(College)~~ and Department at all times. The names or titles of employees whom Coach supervises ~~are attached as Exhibit C.~~will be provided periodically to Coach by the University. 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~~the University's Policy Manual; (~~d~~c) the policies of the Department; (~~e~~d) NCAA ~~(or NAIA)~~ rules and regulations; and (~~f~~e) the rules and regulations of the ~~(Sport) conference of which the University (College) is a member~~Conference.

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 ~~Chief executive officer~~President, enter into separate arrangements for outside activities and endorsements which are consistent with ~~Coach's~~Coach's obligations under this Agreement. Coach may not use the ~~University (College)'s~~University's name, logos, or trademarks in connection with any such arrangements without the prior written approval of the Director and the ~~Chief executive officer~~President.

4.3 ~~NCAA (or NAIA) Rules.~~Outside Income. In accordance with NCAA ~~(or NAIA)~~ rules, Coach shall obtain prior written approval from the ~~University (College)'s Chief executive officer~~President and Director 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 Chief executive officer~~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 ~~(College)~~ work day preceding June 30th. The report shall be in a format reasonably satisfactory to University~~ (College).~~. 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).~~, the University's governing board, the Conference, or the NCAA. Sources of such income shall include, but are not limited to, the following: (a) income from annuities; (b) sports camps, clinics, speaking engagements, consultations, directorships, or related activities; (c) housing benefits (including preferential housing arrangements); (d) country club membership(s); (e) complimentary tickets (i.e., tickets to a Stampede game); (f) television and radio programs; (g) endorsement or consultation contracts with athletic shoe, apparel, or equipment manufacturers.

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 ~~Chief executive officer~~President and the ~~University (College)'s~~University'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~~the Team's 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. Without first giving ten (10) days prior written notice to the Director, Coach shall not negotiate for or accept employment, under any circumstances, as a coach at any other institution of higher education or with any professional sports team requiring the performance of the duties set forth herein.

4.7 Specific Duties of Coach. The Coach is expected to devote full-time to coaching and recruitment involving the Team as the head coach. The Coach will attend all staff meetings, public relation functions, dinners, awards banquet and make appearances as directed by the Director unless excused by the Director. Such functions shall include, but are not limited to, the following:

a) The annual BAA barbecue
b) The weekly BAA function during the relevant season;
c) The annual BAA Endowment dinner;
d) The BSU Athletic Hall of Fame dinner;
e) The BAA Bronze Bronco Award banquet;
f) The BAA/Alumni Auction dinner;
g) All Department staff meetings called by the Director;
h) Athletic Department Graduation Reception;
i) Bronco Golf Series Tournaments.

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, and policies.

5.1.1 In addition to the definitions contained in applicable rules ~~and~~ regulations, and policies, 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~~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~~Agreement within thirty (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, or policies, of the University ~~(College),~~, the ~~University (College)'s~~University's governing board, the ~~conference~~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~~National Association of Intercollegiate Athletics ("NAIA") member institution;

d) Ten (10) working ~~days'~~days absence of Coach from duty without the ~~University (College)'s~~University's consent;

e) Any conduct of Coach that constitutes moral turpitude or that would, in the ~~University (College)'s~~University'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) ~~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~~University's governing board, the ~~conference~~Conference, or the NCAA ~~(NAIA);~~;

h) ~~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~~University's governing board, the ~~conference~~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) ~~i)~~ A violation of any applicable law or the policies, rules or regulations of the University~~ (College)~~, the ~~University (College)'s~~University's governing board, the ~~conference~~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 by ordinary supervision of the violation and could have prevented it by such 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~~Director's 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~~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 ~~(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 ~~5.2~~ Termination of Coach for Convenience of University~~ (College).~~ .

5.2.1 ~~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 ~~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 "base salary amount set forth in section 3.1.1(a), excluding all deductions required by law, on the regular paydays of University ~~(College)~~ until the ~~term~~Term of this Agreement ends or until Coach obtains reasonably comparable employment, whichever occurs first, provided, however, in the event Coach obtains other employment 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

~~deductions~~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 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 market 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 ~~5.2.3~~ The parties have both been represented by, or had the opportunity to ~~consult with,~~be represented by 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 ~~(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.

5.2.4 ~~5.3~~ In the event of non-renewal or termination of Coach's employment, Coach will use all accumulated annual leave prior to the end of the contract period.

5.3 Termination by Coach for Convenience.

5.3.1 ~~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~~Term.

5.3.2 ~~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)~~.

Such termination must occur at a time outside the Team's season (including NCAA post-season competition) so as to minimize the impact on the program.

5.3.3 ~~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 March 31, 2017, the sum of $40,000; (b) if the Agreement is terminated between April 1, 2017 and March 31, 2018 inclusive, the sum of $20,000; (c) if the Agreement is terminated between April 1, 2018 and March 16, 2019 inclusive, the sum of $10,000. 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 ~~5.3.4~~ The parties have both ~~been~~had opportunity to be represented by 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 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~~terminated this Agreement because of a material breach by the University ~~(College)~~..

5.3.5 ~~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 and all accumulated leave.

5.4 ~~5.4~~ Termination ~~due~~Due to Disability or Death of Coach.

5.4.1 ~~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~~University's disability insurance carrier, becomes unable to perform the essential functions of the position of head coach, or dies.

5.4.2 ~~5.4.2~~ If this Agreement is terminated because of ~~Coach's~~Coach's death, ~~Coach's~~Coach's salary and all other benefits shall terminate as of the last day worked, except that the ~~Coach's~~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~~Coach's estate or beneficiaries thereunder.

5.4.3 ~~5.4.3~~ If this Agreement is terminated because the Coach becomes totally or permanently disabled as defined by the ~~University (College)'s~~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~~ (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~~University's student-athletes or otherwise obstruct the ~~University (College)'s~~University's ability to transact business or operate its intercollegiate athletics program.

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.

5.7 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~~provided for in the State Board of Education and Board Rule Manual (ID ADMIN. CODE 08.01.01 et seq) and Governing Policies and Procedures~~, IDAPA 08.01.01 et seq.,~~ Manual, and the University ~~(College) Faculty-Staff Handbook~~Policies.

ARTICLE 6

6.1 Board Approval. This Agreement shall not be effective until and unless approved of the ~~University (College)'s~~University'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~~Agreement shall be subject to the approval of the ~~University (College)'s~~University's Board of ~~(Regents or~~ Trustees~~)~~, the ~~Chief executive officer~~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~~University's rules regarding financial exigency.

6.2 University ~~(College)~~ Property. All personal property~~ (excluding vehicle(s) provided through the ____________ 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~~University's direction or for the ~~University (College)'s~~University'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~~Term of this ~~agreement~~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~~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~~district court in Ada County, Boise, 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~~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 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~~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 ~~(College):~~: Director of Athletics
Boise State University
1910 University Drive
Boise, Idaho 83725-1020

with a copy to: ~~Chief executive officer~~Office of the President
Boise State University
1910 University Drive

Boise, Idaho 83725-1000

the Coach: Gordon H. Presnell
Last known address on file with
~~University (College)'s~~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 (College)'s~~University'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~~between 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~~University'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. 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.

IN WITNESS WHEREOF, the parties agree to the terms and conditions of this Agreement and the incorporated documents attached hereto and have executed this Agreement freely and agree to be bound hereby as of the Effective Date.

UNIVERSITY ~~(COLLEGE)~~ COACH

_______________________________________ ____________________________

______

~~, Chief executive officer~~ Robert Kustra, President _________Date
Gordon H. Presnell ________Date____

Approved by the Board ~~of (Regents or Trustees)~~ on the ________ day of ______________, ~~2010.~~
________, 20__.

EMPLOYMENT AGREEMENT

This Employment Agreement (the "Agreement") is entered into by and between Boise State University (the "University") and Gordon H. Presnell ("Coach").

ARTICLE 1

1.1. Employment. Subject to the terms and conditions of this Agreement, the University shall employ Coach as the head coach (the "Position") of its intercollegiate Women's Basketball team (the "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 (the "Director") or the Director's designee. Coach shall abide by the reasonable instructions of the 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 (the "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. Coach shall, to the best of Coach's ability, and consistent with University policies and procedures, perform all duties and responsibilities customarily associated with the Position. 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 two (2) years ~~three~~ seven (7) months, commencing on ~~December 19, 2014~~August 14, 2016 and terminating without further notice to Coach on March 31, ~~2017~~ 2019 (the "Term") unless sooner terminated in accordance with other provisions of this Agreement.

2.2 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 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.

2.3 Automatic Extensions. The term of this Agreement will automatically be extended by one (1) additional year commencing on April 1 and concluding on March 31 for each season in which the team has at least eighteen (18) wins. For the purpose of calculation of wins, such wins must occur during the regular season, the conference tournament, the Women's National Invitation Tournament ("WNIT"), or the National Collegiate Athletic Association ("NCAA") Tournament, to the exclusion of all other pre-season exhibition games or post-season tournaments.

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) ~~a)~~ A salary of ~~$189,132~~$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 Director and President and approved by the University's Board of Trustees;

b) A one-time bonus payment of $3,875, which shall be paid after execution of this Agreement;

~~b~~c) The opportunity to receive such employee benefits calculated on the "base salary" set forth in set forth in section 3.1.1(a) as the University provides generally to non-faculty exempt employees; and

~~c~~d) The opportunity to receive such employee benefits as the University's Department of Athletics (the "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. Coach may earn supplemental compensation as follows:

3.2.1 Athletic Achievement

a) ~~a)~~ The greatest of the following:

11 conference wins	$2,000
12 conference wins	$3,000
13 conference wins	$4,000
14+ conference wins	$7,500
Conference Regular Season Champions	$12,500
~~Conference Regular Season Champions~~	~~$10,000~~

b) The greater of the following two:
Conference Tournament Finalist $3,000
Conference Tournament Champions $~~10,000~~12,500

c) NCAA Tournament Appearance $5,000 per game

d) WNIT Appearance $3,000 per game

e) ~~The greater of the following two:~~
~~Winning Record (more wins than losses) $4,000~~
~~20~~18 Wins ~~$8,000~~$6,000

3.2.2 Academic Achievement

Academic Incentive Pay may be earned if annual team APR ranks nationally within women's basketball as follows:

National Rank Within Sport		
975-980	=	$5,000
981-985	=	$7,500
986-990	=	$10,000
991 or above	=	$12,500

3.2.3 Conditions for payment of Academic and Athletic supplemental compensation:

a. If Coach qualifies for Athletic Achievement Supplemental Compensation pursuant to section 3.2.1, University will pay Coach on the first regular pay date in July, following the year in which such supplemental compensation is calculated but only if Coach is still employed by the University on that date. Ranking shall be determined based on NCAA National End of Season Ranking.

b. If Coach qualifies for Academic Achievement Supplemental Compensation pursuant to section 3.2.2, it will be paid as soon as reasonably practical following APR rating determination and verification by the NCAA, if Coach is still employed by the University on that date.

c. In order to receive any of the 3.2.1 supplemental compensation, the Team's retention rate must be at least 50% for the academic year in which the supplemental pay is earned. The retention rate will be calculated anew each year and will not be cumulative.

3.2.4 Each year Coach may be eligible to receive supplemental compensation based on the overall development of the intercollegiate women's basketball program; ticket sales; fundraising; outreach by Coach to various constituency groups, including University 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 sole discretion of the President in consultation with the Director and approved by the University's Board of Trustees.

3.2.5 The Coach may receive compensation hereunder from 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 (collectively, "Programs
). 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, which are broadcast on radio or television that conflict with those broadcast on the University's designated media outlets.

3.2.6 Summer Camp Operated by the University. Coach agrees that the University has the exclusive right to operate youth basketball 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 basketball 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 summer basketball camps, the University shall pay Coach a reasonable supplemental compensation during each year of his employment as head coach at the University. The summer youth camp must be operated by Coach in a manner that reflects positively on the University and the Department. The Coach complies with all NCAA, Conference, and University rules and regulations related, directly or indirectly, to the operation of summer youth camps. All revenues and expenses of the Camp shall be deposited with and paid by the University.

In the event of termination of this Agreement, suspension, or reassignment, University 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 shall be released from all obligations relating thereto.

3.2.7 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 has the authority to enter into an agreement with a company 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 a product's design or performance, shall act as an instructor at a clinic sponsored in whole or in part by the University's designated company, or give a lecture at an event sponsored in whole or in part by said company, 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 basketball coach. In order to avoid entering into an agreement with a competitor of the University's designated company, 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 and will not participate in any messages or promotional appearances which contain a comparative or qualitative description of athletic footwear, apparel, or equipment products.

3.2.8 Away Game Guarantee. In the event the University schedules an away contest with a non-conference opponent for which a game guarantee is paid to the University by the host institution, the payment shall be distributed as follows: any amount of the game guarantee, will be split between (a) the Department and (b) the Coach and assistant coaches at the recommendation of Coach, subject to the Director's final approval.

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 of which the University is a member (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 University's Director of NCAA 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 will be provided periodically to Coach by the University. The applicable laws, policies, rules, and regulations include: (a) State Board of Education Governing Policies and Procedures and Rule Manual; (b) the University's Policy Manual; (c) the policies of the Department; (d) NCAA rules and regulations; and (e) the rules and regulations of the Conference.

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 Outside Income. In accordance with NCAA rules, Coach shall obtain prior written approval from the President and Director 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. 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. Sources of such income shall include, but are not limited to, the following: (a) income from annuities; (b) sports camps, clinics, speaking engagements, consultations, directorships, or related activities; (c) housing benefits (including preferential housing arrangements); (d) country club membership(s); (e) complimentary tickets (i.e., tickets to a Stampede game); (f) television and radio programs; (g) endorsement or consultation contracts with athletic shoe, apparel, or equipment manufacturers.

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 Trustees.

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 the Team's 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. Without first giving ten (10) days prior written notice to the Director, Coach shall not negotiate for or accept employment, under any circumstances, as a coach at any other institution of higher education or with any professional sports team requiring the performance of the duties set forth herein.

4.7 Specific Duties of Coach. The Coach is expected to devote full-time to coaching and recruitment involving the Team as the head coach. The Coach will attend all staff meetings, public relation functions, dinners, awards banquet and make appearances as directed by the Director unless excused by the Director. Such functions shall include, but are not limited to, the following:

a) The annual BAA barbecue
b) The weekly BAA function during the relevant season;
c) The annual BAA Endowment dinner;
d) The BSU Athletic Hall of Fame dinner;
e) The BAA Bronze Bronco Award banquet;
f) The BAA/Alumni Auction dinner;
g) All Department staff meetings called by the Director;
h) Athletic Department Graduation Reception;
i) Bronco Golf Series Tournaments.

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, regulations, and policies.

5.1.1 In addition to the definitions contained in applicable rules regulations, and policies, 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 thirty (30) days after written notice from the University;

c) A deliberate or major violation by Coach of any applicable law or the rules, regulations, or policies, 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 National Association of Intercollegiate Athletics ("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 by ordinary supervision of the violation and could have prevented it by such 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 Director's 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 "base salary amount 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 or until Coach obtains reasonably comparable employment, whichever occurs first, provided, however, in the event Coach obtains other employment 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 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 market 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 been represented by, or had the opportunity to be represented by 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.

5.2.4 In the event of non-renewal or termination of Coach's employment, Coach will use all accumulated annual leave prior to the end of the contract period.

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. Such termination must occur at a time outside the Team's season (including NCAA post-season competition) so as to minimize the impact on the program.

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 March 31, ~~2015~~2017, the sum of $40,000; (b) if the Agreement is terminated between April 1, ~~2015~~ 2017 and March 31, ~~2016~~ 2018 inclusive, the sum of $20,000; (c) if the Agreement is terminated between April 1, ~~2016~~ 2018 and March 16, ~~2017~~ 2019 inclusive, the sum of $10,000. 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 had opportunity to be represented by 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 terminated 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 and all accumulated leave.

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 provided for in the State Board of Education and Board Rule Manual (ID ADMIN. CODE 08.01.01 et seq) and Governing Policies and Procedures Manual, and the University Policies.

ARTICLE 6

6.1 Board Approval. This Agreement shall not be effective until and unless approved of 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, 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 Trustees and University's rules regarding financial exigency.

6.2 University Property. All personal property, 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 state district court in Ada County, Boise, 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 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 Boise State University 1910 University Drive Boise, Idaho 83725-1020
with a copy to:	Office of the President Boise State University 1910 University Drive Boise, Idaho 83725-1000
the Coach:	Gordon H. Presnell 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 between 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.

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. 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.

IN WITNESS WHEREOF, the parties agree to the terms and conditions of this Agreement and the incorporated documents attached hereto and have executed this Agreement freely and agree to be bound hereby as of the Effective Date.

UNIVERSITY		COACH	
______________________________		______________________________	
Robert Kustra, President	Date	Gordon H. Presnell	Date

Approved by the Board on the ___ day of ________, 20__.

BOISE STATE UNIVERSITY

Women's Basketball APR History and National Percentile Rank

SINGLE YEAR NCAA ACADEMIC PROGRESS RATE (APR) SCORES

	2011-12	2012-13	2013-14	2014-15
Women's Basketball	1000	962	966	983
National % Rank by Sport	***90-100***	***20-30***	***20-30***	***70-80***

REPORT YEAR
Raw Score for single year
Percentile Rank for Sport

MULTI-YEAR APR (4-Year Rolling Average)

Women's Basketball	973	973	974	970

Coach	School	Length of Contract	2015 Salary (total comp)	Liquidated Damages Clause?	Type of L.D. Clause	Amount(s) over time
Yvonne Sanchez	New Mexico	5/1/15 - 4/30/19	$ 266,640	Yes	Flat Rate	$100,000 paid within 60 days of termination at any time
Gordon Presnell	Boise State	6/16/16 - 3/31/19	$ 220,000	Yes	Sliding Scale	See Contract
Ryun Williams	Colorado State	7/1/15 - 6/30/20	$ 219,300	Yes	Tied to base salary and number of years remaining on contract	(i) If such termination occurs on or before July 31, 2019, the Liquidated Damages shall be the greater of: (1) $1,075,000; or (2) an amount equal to Williams' total remaining Base Salary (as set forth in Section 4.a. herein and as of the date of termination) for all years and months remaining from the termination date until the Contract Ending Date (as defined in Section 1 herein); or (ii) If such termination occurs after July 31, 2019, the Liquidated Damages shall be an amount equal to Williams' total remaining Base Salary (as set forth in Section 4.a. herein and as of the date of termination) for all years and months remaining from the termination date until the Contract Ending Date (as defined in Section 1 herein).
Stacie Terrry	San Diego State	7/1/15 - 4/30/18	$ 218,880	Yes	Sliding Scale	9. Buyout-schedule of payments if coach leaves early for another position a. Before completion of years one and two-$225,000 b. Before completion of year three-$125,000 c. Before completion of year four-$75,000 d. Before completion of year five-$0
Jaime White	Fresno State	4/16/14 - 4/15/19	$ 200,004	NA	NA	NA
Joe Legerski	Utah State	5/1/14 - 4/30/19	$ 188,004	No	NA	NA
Jamie Craighead	San Jose State	8/1/15 - 9/16/18	$ 185,400	No	NA	NA
Jane Albright	Nevada	7/1/12 - 6/30/16	$ 183,245	Yes	Flat Rate	c. In the event the Employee terminates this Agreement, the Employee shall pay to the University, as liquidated damages, an amount equal to the Employee's Guaranteed Base Salary for the period remaining in the Term of this Agreement.
Kathy Oliver	UNLV	7/1/15 - 4/1/17	$ 181,800	Yes	Flat Rate	c. In the event the Employee terminates this Agreement, the Employee shall pay to the University, as liquidated damages, an amount equal to the Employee's Guaranteed Base Salary for the period remaining in the Term of this Agreement.
Jerry Finkbeiner	Utah State	7/1/12 - 5/30/17	$ 157,975	Yes	Sliding Scale	100% of annual salary in 1st year, 75% of of annual salary in 2nd year, 50% of of annual salary in 3rd year, 25% of of annual salary in 4th year.
Chris Gobrecht	Air Force	NA	NA	NA	NA	NA

<table>
<tr><th>Coach</th><th>School</th><th>Base Salary</th><th>Incentives</th></tr>
<tr><td>Yvonne Sanchez</td><td>New Mexico</td><td>$ 266,640</td><td>Courtesy car, Country club membership

1. Winning Mountain West Conference (MWC) regular season $5,000.00
2. Winning MWC post-season tournament $10,000.00
3. Qualifying for National Collegiate Athletic Association (NCAA) but not winning regular season or post-season $5,000.00
4. Sweet 16 Appearance $10,000.00
5. Elite 8 Appearance $15,000.00
6. Final 4 Appearance $30,000.00

Coach Sanchez will receive either Five Thousand ($5,000.00) for the MWC regular season or Ten Thousand ($10,000.00) for post-season tournament, but not a cumulative amount. Coach Sanchez will be eligible for such incentive salary payments within sixty (60) days after the end of each contract year in which the incentive is earned. No incentive salary payments will be paid in any contract year where the team either exceeds its approved budget or has any academically ineligible players after summer school.</td></tr>
<tr><td>Gordon Presnell</td><td>Boise State</td><td>$ 220,000</td><td>See Agreement</td></tr>
<tr><td>Ryun Williams</td><td>Colorado State</td><td>$ 219,300</td><td>Courtesy car, country club membership,
<table>
<tr><th>Achievement</th><th>Additional Compensation</th></tr>
<tr><td>Win either the Mountain West Conference regular season championship or the Mountain West Conference Tournament championship (Note: If Williams wins both the regular season and tournament championship in the same season, a maximum of $25,000 will be paid for this achievement.)</td><td>Additional $25,000</td></tr>
<tr><td>Qualify for the NCAA Championship Tournament</td><td>Additional $30,000</td></tr>
<tr><td>Advance to the Sweet 16 of the NCAA Championship Tournament</td><td>Additional $30,000</td></tr>
<tr><td>Advance to the Final 4 of the NCAA Championship Tournament</td><td>Additional $30,000</td></tr>
<tr><td>Win the NCAA National Championship Tournament</td><td>Additional $50,000</td></tr>
</table></td></tr>
</table>

Stacie Terrry	San Diego State	$ 218,880	4. **Bonus structure-** a. MWC Regular Season or Tournament Championship-$17,000 b. NCAA Tournament-highest of below i. Appearance-$25,000 ii. Final Four appearance-$35,000 iii. Championship-$50,000 c. WNIT Post-Season Appearance-$17,000 d. MWC Coach of Year-$5,000 e. National Coach of Year-$15,000 f. Team cumulative GPA above 2.80-$10,000 g. APR (4 year average) above 950-$10,000 h. Win 20 or more games-$10,000 5. **Use of Car**-car stipend, $341.67 per month
Jaime White	Fresno State	$ 200,004	NA
Joe Legerski	Wyoming	$ 188,004	Courtesy car, housing allowance ($2,000) a. **Season Ticket Incentives**: sold at full price (as set by the Athletic Department) 750 to 999 tickets sold /year $10,000 1,000 to 1,499 tickets sold/year $20,000 1,500 to 1,999 tickets sold/year $25,000 2,000 to 2,499 tickets sold/year $30,000 2,500 or more tickets sold/year $35,000 b. **Single Game Ticket Incentive**: $1.00 per single game ticket purchased at all home basketball games, including exhibition games but not including any post-season tickets sold. c. **Cowboy Joe and Athletic Department Speaker and Appearance Fee**: $25,000 d. **Sports Radio Broadcast Talent Fee**: $7,500 e. **Outreach/Promotional Appearance Fee**: $12,500 (Employee must make a MINIMUM of 3 appearances for outreach/promotional purposes as approved by the Director of Athletics. These appearances are in addition to other contractual appearance requirements). f. **Academic Achievement Award**: $7,500 Employee shall receive $7,500 for each year in which the cumulative team GPA is a 3.0 or higher at the end of the full academic year including summer. For purposes of this

			or higher at the end of the full academic year including summer. For purposes of this incentive the following provisions apply: 1. The annual "team" shall be defined as the official squad list that is sent to the MWC prior to the 1st date of competition. 2. The annual "team" GPA shall be calculated using the following parameters: · The GPA shall be calculated at the end of the full academic year including the following summer. For example, when calculating the annual "team" GPA for the 2012-2013 academic year, the fall 2012, spring 2013 and summer 2013 term GPAs will be utilized. o The exception to this rule will be that the summer term *prior to* the academic year will be included in the calculation for any newcomers (including those newcomers receiving an athletic scholarship and those not receiving an athletic scholarship) who took summer school prior to initial enrollment. Thus, when calculating the annual "team" GPA for the 2012-2013 academic year, the summer 2012 (only for newcomers taking summer school prior to initial enrollment), the fall 2012, spring 2013 and summer 2013 term GPAs will be utilized. · The annual "team" GPA will be calculated using the Quality (GPA) Hours and Quality Points earned for each term as outlined above. 3. The annual "team" GPA shall be calculated by the Athletic Office of Academic Support. g. **Post-Season Incentive Fee:** • NCAA Tournament Appearance Incentive -- $10,000 plus an additional $2,500 for each round beyond the first round; • WNIT Appearance Initiative -- $5,000 plus an additional $1,000 for each round played beyond the first round. **NOTE: The above Post-Season Incentive Fees are in addition to any awards provided by the Cowboy Joe Club per its Bylaws and /or by approval vote of the Cowboy Joe Club Board of Directors.**
Jamie Craighead	San Jose State	$ 185,400	• Employee will receive $900 per month as a vehicle allowance. • Conference championship - Regular season - $15,000 - Conference tournament - $15,000 • NCAA at-large bid - $15,000 • WNIT post-season bid - $5,000 • Conference coach-of-the-year - $10,000 • If the team's 2013-14 individual year APR is 950 or higher - $5,000. The APR number will be set annually by October 1 during the remaining years of this contract. • If the team wins 15 regular season games or more, employee's supplemental compensation will increase by $7,500/year • If the team has a winning regular season, more wins than losses, the term of this agreement will be extended one year.

Jane Albright	Nevada	$ 183,245	Courtesy car, a. NCAA Tournament. For each round of the NCAA Tournament that the team plays, the University will pay the Employee fifty percent (50%) of one month's salary. b. Final Four. For the team playing in the Final Four NCAA Tournament, the University shall pay the Employee the sum of Ten Thousand Dollars ($10,000.00). c. NCAA Tournament Winner. For the team winning the NCAA Tournament, the University shall pay the Employee the sum of Fifty Thousand Dollars ($50,000.00). d. NIT. For each round in which the team plays in the NIT the University will pay Employee the sum of Five Thousand Dollars ($5,000.00). e. Conference Coach of the Year. If Employee is selected as Coach of the Year of the Conference, the University will pay Employee the sum of Two Thousand Five Hundred Dollars ($2,500.00).
Kathy Oliver	UNLV	$ 181,800	Courtesy car, Hosting account of $4000 anually, Media appearnces of $10,000 annually, Winning Conference Championship or NCAA at-large birth of $5,000, NCAA post-season tournament game win of $5,000
Jerry Finkbeiner	Utah State	$ 157,975	Car stipend of $400, Country club membership a. The equivalent of one month of salary for any post season play (NCAA or NIT) and/or conference tournament championship (payment for one event only-not cumulative), b. $6,000 for reaching each of the final three rounds of the NCAA Championship Tournament starting with the final16, final 8, and final 4. (The intent of this provision is cumulative so that if Coach reaches the Final4, he will be entitled to $18,000.) b. $3,000 for reaching the final 4 of the National Invitational Tournament c. $3,000 for maintaining an annualized APR score 961 or above. d. $5,000 for conference Coach of the Year honors. f. $5,000 for conference regular season championship. g. $3,000 bonus for winning 18 regular season games
Chris Gobrecht	Air Force	NA	NA

Coach Gordon Presnell Maximum Compensation Calculation - 2016-2019

		Yr 1	Yr 2	Yr 3
3.1.1a	Annual Base Salary	$ 220,000.00	$ 220,000.00	$ 220,000.00
3.2.1	Additional Pay based on Performance	$ 66,000.00	$ 66,000.00	$ 66,000.00
3.2.2	Additional Pay based on Academic Achievement	$ 12,500.00	$ 12,500.00	$ 12,500.00
	Total Maximum potential annual compensation under Employment Agreement	$ 298,500.00	$ 298,500.00	$ 298,500.00
3.2.8	Away Game Guarantee	Indeterminant	Indeterminant	Indeterminant

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SUBJECT

Chief Executive Officers Contracts

REFERENCE

May 2016	Board conducted performance evaluations for the chief executive officers of Boise State University, Idaho State University, University of Idaho, Lewis-Clark State College, and Eastern Idaho Technical College.
June 2016	Board approved salaries for the chief executive officers of Boise State University, Idaho State University, University of Idaho, and Lewis-Clark State College.

BACKGROUND/DISCUSSION

The Board approved salaries for the chief executive officers of Boise State University, Idaho State University, University of Idaho, and Lewis-Clark State College at the June 2016 Board meeting. The proposed contracts incorporate those salaries into the applicable chief executive officers employment agreements, moves existing language regarding tax liability that is currently contained in two sections into a single section, and eliminates the language regarding the use of institutional vehicles, while maintaining the current language and level for a vehicle allowance. The removal of the provision regarding the use of an institution vehicle bring the contract into alignment with the state prohibition against using state owned or controlled vehicles for personal use and is consistent with the proposed amendments to Board policy regarding courtesy vehicles that will be considered at the August 2016 Board meeting.

IMPACT

Approval of the contracts incorporate amendments consistent with recent Board action and proposed policy amendments.

BOARD ACTION

I move to approve the amended employment agreement for Dr. Robert Kustra as President of Boise State University.

Moved by __________ Seconded by __________ Carried Yes _____ No _____

I move to approve the amended employment agreement for Dr. Chuck Staben as President of the University of Idaho.

Moved by __________ Seconded by __________ Carried Yes _____ No _____

I move to approve the amended employment agreement for Dr. Art Vailas, as President of Idaho State University.

Moved by __________ Seconded by __________ Carried Yes _____ No _____

I move to approve the amended employment agreement for Dr. Tony Fernandez as President of Lewis-Clark State College.

Moved by __________ Seconded by __________ Carried Yes _____ No _____

UNIVERSITY OF IDAHO

SUBJECT

Request approval for pouring and vending rights contract

APPLICABLE STATUTE, RULE, OR POLICY

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

BACKGROUND/DISCUSSION

Request for Proposals No. 16-39M was issued, with two vendors responding. Based on proposals received, Swire Coca Cola USA (SCCUSA) was deemed the successful vendor, pending Idaho State Board of Education (Board) approval.

IMPACT

The initial contract term is five years. SCCUSA's financial incentive is $177,000.00 per year for a combined five-year total of $885,000.00. Estimated vending commissions for the initial term is $65,500.00. Total value with estimated commission is $950,500.00.

ATTACHMENTS

STAFF COMMENTS AND RECOMMENDATIONS

Board Policy V.I.3. sets the dollar amount limits for contract approvals. Service contracts over $1,000,000 require Board approval. The potential total value of the contract over three possible five-year terms would exceed $1,000.000.00. Staff recommends approval.

BOARD ACTION

I move to approve the request by the University of Idaho to enter into a contract with Swire Coca Cola USA for pouring and vending rights in substantial conformance to the form presented to the Board in Attachment 1.

Moved by __________ Seconded by __________ Carried Yes _____ No _____

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UNIVERSITY OF IDAHO
AGREEMENT NUMBER UI-787

The University of Idaho (hereinafter called the University) hereby awards to Swire Coca-Cola USA, (hereinafter called the Contractor) Agreement number UI-787 to furnish Pouring and Vending Serivces to the University, as specified in University of Idaho Request for Proposals Number 16-39M, in accordance with the terms and conditions of the Request for Proposals.

This Agreement is supplemented by a) University of Idaho Request for Proposals Number 16-39M; b) Swire Coca-Cola USA proposal dated January 22, 2016 (exceptions included) with Appendix A; and c) University of Idaho General Terms and Conditions, which have been agreed to by the parties and by this reference are made a part hereof as though fully set forth herein. To the extent such terms, conditions, or provisions may be in conflict or be inconsistent, their order of authority shall be as follows: 1) University of Idaho Agreement Number UI-787; 2) University of Idaho Request for Proposals Number 16-39M; 3) Swire Coca-Cola USA proposal dated January 22, 2016 (exceptions included) with Appendix A, and 4) University of Idaho General Terms and Conditions.

1.1 NOTICES

Any notice under this Agreement shall be in writing and be delivered either in-person, delivery service, 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:	University of Idaho Contracts & Purchasing Services 1028 West Sixth Street Moscow, Idaho 83844-2006 Attn: Julia R. McIlroy Phone: (208) 885-6123 Fax: (208) 885-6060 Email: juliam@uidaho.edu
the Contractor:	Swire Coca-Cola USA 425 28th Street North Lewiston, Idaho 83501 Attn: Julie Jackson Phone: (208) 746-0541 Fax: (208) 746-9071 Email: jjackson@swirecc.com

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.

1.2 SEVERABILITY

The terms and conditions of this Agreement are declared severable if any term or condition of this Agreement or the application thereof to any person(s) or circumstance(s) is held invalid. Such invalidity shall not affect other terms, conditions, or applications which can be given effect without the invalid term, condition, or application.

1.3 RFP PRICE

The bid price shall include everything necessary for the prosecution and completion of this Agreement, including, but not limited to, furnishing all materials, equipment, management, superintendence, labor, and service, except as otherwise provided in this Agreement. Prices quoted on the Bid Form shall include all freight and/or delivery charges. In the event of a discrepancy between the unit price and the total price, the unit price will govern and the total price will be adjusted accordingly.

1.4 TERM OF AGREEMENT

The initial term of this agreement shall be five (5) years, commencing upon the date of execution by the University. The term of this agreement may, if mutually agreed, be extended by two (2), five-year increments, provided the Contractor receives written notice of each extension at least thirty (30) days prior to the expiration date of such term or extension. During extension periods, all terms and conditions of this Agreement shall remain in effect.

1.5 CONTRACTOR RESPONSIBILITIES

Contractor agrees to submit a marketing and retail placement plan to the University of Idaho Office of Alumni Relations. Sales reporting will be submitted quarterly to the University of Idaho Office of Alumni Relations. Sales reporting should include bottles sold via retail outlets, Internet, and University of Idaho food and beverage provider. All costs associated with label creation are the responsibility of Contractor. Final label artwork, concept, and display to be approved by the University of Idaho Office of Alumni Relations. Specific wine type must be approved by University of Idaho Office of Alumni Relations prior to bottling.

1.6 CONTINUATION DURING DISPUTES

The Contractor agrees that, notwithstanding the existence of any dispute between the parties, insofar as possible under the terms of the Agreement to be entered into, each party will continue to perform the obligations required of it during the continuation of any such dispute, unless enjoined or prohibited by any court.

1.7 ENTIRE AGREEMENT

This Agreement constitutes the entire Agreement between the parties. No change thereto shall be valid unless communicated in writing in the stipulated manner and signed by the University and the Contractor.

The effective date of this contract is August 15, 2016

FOR THE REGENTS OF THE UNIVERSITY OF IDAHO		SWIRE COCA-COLA USA	
SIGN	______________	SIGN	______________
PRINT	______________	PRINT	______________
TITLE	______________	TITLE	______________
DATE	______________	DATE	______________

University of Idaho RFP NO. 16-39M -Response- Swire Coca-Cola, USA

Package Pricing and Commiss	Vend Price	Comm %
FS: Description		
FS: 12oz Cans Singles	1.00	10.0%
FS: 20 oz NR	1.50	40.0%
FS: Dasani/20oz	1.50	40.0%
FS: Glaceau Smt/20oz Bot	1.50	10.0%
FS: Glaceau Vit/500ml - 6pk	1.50	10.0%
FS: Minute Maid Sparkling	1.50	10.0%
FS: Energy/16 oz FT/Nos	2.50	35.0%
FS: Energy/16 oz Monster	2.50	35.0%
FS: Energy/16oz Monster Java	2.50	35.0%
FS: ISO/20 oz	1.50	15.0%
FS: Juice/.450/MM	1.50	15.0%
FS: Honest Tea/16.9 oz Bot	1.50	15.0%
FS: Gold Peak/18.5 oz Bot	1.50	15.0%
FS: SNACKS	1.00	12.0%
FS: SNACKS	1.50	12.0%

*COMMISSION PERCENT PAID ON CASH COLLECTED

University of Idaho

Contracts & Purchasing Services

1028 West Sixth Street
Moscow, Idaho 83844

REQUEST FOR PROPOSALS NO. 16-39M

FOR

POURING AND VENDING SERVICES

Julia R. McIlroy, Director
Phone (208) 885-6123
Fax (208) 885-6060
juliam@uidaho.edu
www.purchasing.uidaho.edu

Date Issued: November 30, 2015

Proposals Due: January 8, 2016

UNIVERSITY OF IDAHO REQUEST FOR PROPOSALS NO. 16-39M

PROPOSAL RESPONSE CERTIFICATION

____
DATE

The undersigned, as Proposer, declares that they have read the Request for Proposals, and that the following proposal is submitted on the basis that the undersigned, the company, and its employees or agents, shall meet, or agree to, all specifications contained therein. It is further acknowledged that addenda numbers _____ to _____ have been received and were examined as part of the RFP document.

____
Name

____
Signature

____
Title

____
Company

____
Street Address

____
City, State, Zip

____
Telephone Number

____
Cell Phone Number

____
E-mail Address

____
State of Incorporation

____
Tax ID Number

Business Classification Type (Please check mark if applicable):

Minority Business Enterprise (MBE)	_______
Women Owned Business Enterprise (WBE)	_______
Small Business Enterprise (SBE)	_______
Veteran Business Enterprise (VBE)	_______
Disadvantaged Business Enterprise (DBE)	_______

Business Classification Type is used for tracking purposes, not as criteria for award.

SECTION 1 - INSTRUCTIONS TO PROPOSERS

1-1 SCOPE OF WORK

The University of Idaho (herein referred to as the University) is soliciting proposals for pouring and vending services.

Founded in 1889, the University of Idaho is the state's flagship university. It is Idaho's only land-grant institution and its principal graduate education and research university, bringing insight and innovation to the state, the nation and the world. University researchers attract nearly $100 million in research grants and contracts each year.

The University of Idaho is classified by the prestigious Carnegie Foundation as high research activity. The student population of 12,000 includes first-generation college students and ethnically diverse scholars, who select from more than 130 degree options in the colleges of Agricultural and Life Sciences; Art and Architecture; Business and Economics; Education; Engineering; Law; Letters, Arts and Social Sciences; Natural Resources; and Science. The university also is charged with the statewide mission for medical education through the WWAMI program. The university combines the strength of a large university with the intimacy of small learning communities and focuses on helping students to succeed and become leaders. For more information, visit www.uidaho.edu.

1-2 PROPOSAL SUBMISSION

Proposal must be **SEALED and CLEARLY IDENTIFIED** with the Request for Proposals' number, due date and time, Proposer's name and address, and submitted no later than 5:00 p.m., on January 8, 2016.

Please note: FedEx Express delivery is highly recommended. Packages should be addressed and/or delivered to the following address:

University of Idaho – Contracts & Purchasing Service 1028 West Sixth Street Moscow, Idaho 83844

A facsimile response or an electronic response to this Request for Proposals does not meet the requirement of a sealed proposal and will not be accepted.

The proposal must be signed by such individual or individuals who have full authority from the Proposer to enter into a binding Agreement on behalf of the Proposer so that an Agreement may be established as a result of acceptance of the proposal submitted. By reference, the terms and conditions set forth in the Request for Proposals shall serve as the Agreement terms and conditions. In addition, the laws of the State of Idaho shall apply. No other terms and conditions will apply unless submitted as a part of the proposal response and accepted by the University.

Proposals received after the exact time specified for receipt will not be considered.

1-3 REQUEST FOR PROPOSAL SCHEDULE

11/30/15	Request for Proposals Issued
12/15/15	Inquiries Due
1/8/16	Proposals Due @ 5:00 p.m.

1-4 INQUIRIES

All inquiries concerning this request shall be submitted in writing and received by Contracts & Purchasing Services no later than 12/15/15, to:

Julia R. McIlroy, Director
E-mail: juliam@uidaho.edu

Proposers should consider Contracts & Purchasing Services as the first and prime point of contact on all matters related to the procedures associated with this RFP. If additional information is needed from any source, Contracts & Purchasing Services will work with the Proposer and with the various offices of the University to gather that information.

1-5 INTERPRETATION, CORRECTIONS, OR CHANGES IN RFP

Any interpretation, correction, or change in the RFP will be made by addendum by the University. Interpretations, corrections, or changes to the RFP made in any other manner will not be binding, and no Proposer may rely upon any such interpretation, correction, or change.

1-6 MODIFICATION OR WITHDRAWAL OF PROPOSALS

A Proposer may modify or withdraw a proposal at any time prior to the specified time and date set for the proposal closing. Such a request for modification or withdrawal must be in writing, and executed by a person with authority as set forth under paragraph 1-2 above, or by facsimile notice subsequently confirmed in writing.

1-7 ERASURES AND INTERLINEATIONS

Erasures, interlineations, or other changes in the proposal must be initialed by the person(s) signing the proposal.

1-8 ACKNOWLEDGMENT OF ADDENDUMS TO RFP

Receipt of an addendum to this RFP must be acknowledged by a Proposer on the Proposal Response Certification (Attachment A).

1-9 PROPOSAL COPIES

Seven (7) complete copies of the proposal shall be submitted to the University.

1-10 OFFER ACCEPTANCE PERIOD

A proposal shall constitute an offer to contract on the terms and conditions contained in this RFP and the proposal. Said proposal shall constitute an irrevocable offer for ninety (90) calendar days from the proposal opening date, even if the University makes one or more counter offers.

1-11 REJECTION OF PROPOSALS

The University in its sole discretion, expressly reserves the right to reject any or all proposals or portions thereof, to reissue a Request for Proposal, and to waive informalities, minor irregularities, discrepancies, and any other matter or shortcoming.

1-12 PROPOSAL PRICE

The prices submitted in the proposal shall include everything necessary for the prosecution and completion of the Agreement including, but not limited to, furnishing all materials and all management, supervision, labor and service, except as may be provided otherwise in the Agreement Documents. In the event of discrepancy between the unit prices and their extensions, the total price will be adjusted accordingly. In the event of discrepancy between the sum of the extended total prices, the Total Proposal Price will be adjusted accordingly. The proposal price shall not include any allowance for Idaho State sales/use tax.

The University will evaluate the total price for the basic requirements with any options(s) exercised at the time of award. Evaluation of options will not obligate the University to exercise the option(s).

The University may reject an offer if it is materially unbalanced as to process for the basic requirements and the option quantities. An offer is unbalanced when it is based on prices significantly less than cost for some work and prices that are significantly overstated for other work.

1-13 TERM OF AGREEMENT

The initial term of this agreement shall be five (5) years, commencing upon the date of execution by the university. The term of this agreement may, if mutually agreed upon in writing, be extended by two, five-year increments for a total of ten additional years, provided written notice of each extension is given to the bidder at least thirty (30) days prior to the expiration date of such term or extension. In the event funding approval is not obtained by the University, this Agreement shall become null and void effective the date of renewal. During extension periods, all terms and conditions of this Agreement shall remain in effect.

1-14 AWARD OF AGREEMENT

The University shall make the award to the responsible Proposer whose proposal will be most advantageous to the University with respect to price, conformance to the specifications, quality, and other factors as evaluated by the University. The University is not required or constrained to award the Agreement to the Proposer proposing the lowest price.

The University may award an Agreement on the basis of initial offers received, without discussion; therefore, each initial offer should contain the offerer's best terms from a cost and technical standpoint.

1-15 PUBLIC AGENCY

The Contractor has agreed to extend contract usage to other public agencies, such as any city or political Subdivision of this state, including, but not limited to counties; school districts; highway districts; port authorities; instrumentalities of counties, cities or any political subdivision created under the laws of the State of Idaho; any agency of the state government; or any city or political subdivision of another state.

1-16 PROPOSAL CONFIDENTIALITY

Each Proposer agrees that the contents of each proposal submitted in response to this RFP is Confidential, proprietary, and constitutes trade secret information, as defined in Idaho Code 9-340D(1), as to all technical and financial data LABELED **CONFIDENTIAL** BY THE PROPOSER, and waives any right of access to such information, except as provided for by law. Except as determined by the University's Office of Purchasing Services, in its sole discretion, no information will be given regarding any proposals or evaluation progress until after an award is made, except as provided by law.

1-17 F.A.R. REQUIREMENT

All purchase orders and contracts issued by the University of Idaho are subject to F.A.R. 52.209-6. Supplier warrants that supplier or its principals are presently debarred, suspended or proposed for debarment by the Federal Government.

1-18 RECORD OF PURCHASES

Contractor will provide Purchasing Services a detailed usage report of items/services ordered, quantities, and pricing under this Agreement upon request.

1-19 APPEAL OF AWARD

A Proposer aggrieved by the award of an Agreement may file an appeal by writing to the University Controller within five (5) business day of award. Proposers are responsible for tracking of award announcement.

SECTION 2 - INSTRUCTIONS FOR PREPARING PROPOSALS

2-1 GENERAL

To aid in the evaluation process, it is required that all responses comply with the items and sequence as presented in paragraph 2-2, RFP Response Outline. Paragraph 2-2 outlines the minimum requirements and packaging for the preparation and presentation of a response. Failure to comply may result in rejection of the response. The proposal should be specific and complete in every detail, prepared in a simple and straight-forward manner.

Proposers are expected to examine the entire Request for Proposals, including all specifications, standard provisions, and instructions. Failure to do so will be at the Proposer's risk. Each Proposer shall furnish the information required by the invitation. It is required that proposal entries be typewritten. Periods of time, stated in number of days, in this request or in the Proposer's response, shall be in calendar days. Propose your best price on each item.

2-2 RFP RESPONSE OUTLINE

A. Response Sheet: The proposal Response Certification shall be attached to the front of the proposal and shall contain the Proposer's certification of the submission. An official who has full authority to enter into an Agreement shall sign it.

B. Background and History: Describe the company, organization, officers or partners, number of employees, and operating policies that would affect this Agreement. State the number of years your organization has been continuously engaged in business.

C. References: The Proposer shall provide a minimum of three (3) references including names of persons who may be contacted, title of person, addresses, phone numbers, and e-mail, where products or services similar in scope to the requirements of this RFP have been provided.

D. Experience and Support: Describe Proposer's experience in performing the requested services.

E. Technical Specifications & Pricing: Include itemized costs for all components and features to be delivered. Costs should be identified as one-time or continuing. Purchase prices, lease prices, installation charges, and maintenance charges must be identified. All equipment prices must be stated as FOB: Moscow, ID.

F. Warranties: Describe warranties provided by the Proposer. Include discussions of any additional support provided after the sale.

G. Proposer Exceptions: Describe any exceptions to the terms and conditions contained within this document.

SECTION 3 - TECHNICAL SPECIFICATIONS

The RFP represents an opportunity for vendors to provide examples of its management, marketing and operational strategies, innovation and creativity, and understanding of the University of Idaho communities and objectives.

Proposals should define the market size and potential market capture, identify specific sales and revenue objectives of the University, and include assumptions, expectations and commitments required to obtain these financial and operational goals. Each proposal should also include management, service and reporting commitments, together with specific suggestions regarding communication, planning and performance review. The expectations, rights, and responsibilities of both the University and the supplier will be identified and reviewed at the outset of the contract.

Proposals should create a comprehensive, integrated beverage program that will increase customer satisfaction by providing quality products, easier access, state-of-the-art equipment with top selections, technology, and improved distribution and locations throughout the campus. It should target aggressive sales and profitability goals for achieving substantial growth in beverage sales campus-wide. As importantly, the University is interested in collaborative and innovative strategies and programs that support and advance its broad objectives. The University specifically solicits your creative ideas and recommendations.

Proposals should include vendor's best sustainability and environmental practices and procedures.

The University anticipates a contract that provides 90/10 rights for the selected beverage supplier to sell and promote the sale of beverages throughout the University, and food operations. Beverages may include, without limitation, carbonated and non-carbonated artificially flavored drinks, packaged waters, fruit and/or vegetable juices, fruit and/or juice containing drinks, tea products, and drink and beverage bases in the form of syrups, whether powders, crystals, concentrates or otherwise, from which such drinks and beverages can be prepared.

SECTION 4 - PROCUREMENT PROCESS

4-1 PROPOSER LIST AND QUALIFICATION EVALUATION

After the established date for receipt of proposals, a listing of Proposers submitting proposals will be prepared, and will be available for public inspection.

Qualifications and proposals submitted by interested Proposers will be reviewed and evaluated based on the evaluation factors set forth in the RFP.

4-2 PROPOSAL CLASSIFICATION

For the purpose of conducting discussions with individual offerers, if required, proposals will initially be classified as:

A. Potentially Acceptable
B. Unacceptable

Discussions may be conducted with any or all of the Proposers whose proposals are found acceptable or potentially acceptable. Offerers whose proposals are unacceptable will be notified promptly. The Manager of Purchasing will establish procedures and schedules for conducting oral and/or written discussions.

Proposers are advised that the University may award an Agreement on the basis of initial offers received, without discussions; therefore, each initial offer should contain the offerer's best terms from a cost and technical standpoint.

4-3 PROPOSER INVESTIGATION

The University will make such investigations as it considers necessary to obtain full information on the Proposers selected for discussions, and each Proposer shall cooperate fully in such investigations.

4-4 FINAL OFFERS AND AWARD OF AGREEMENT

Following any discussions with Proposers regarding their technical proposals, alternative approaches, or optional features, a number of the firms may be requested to submit best and final offers. The committee will rank the final Proposers for the project, giving due consideration to the established evaluation criteria. The committee will propose award to the proposal which is found to be most advantageous to the University, based on the factors set forth in the Request for Proposals.

SECTION 5 - EVALUATION PROCESS

The University reserves the right to reject any or all proposals, or portions thereof. The selection of a successful Proposer, if any, will be made based upon which proposal the University determines would best meet its requirements and needs.

5-1 EVALUATION CRITERIA

- Beverage Operations and Management Plan
Innovative and creative management, marketing and operational strategies and programs
Sustainability practices and procedures

- Contract Administration, Communication and Reporting
Process to assure continual, optimal performance
Accurate and user-friendly reporting tools and controls
Highly flexible and inclusive contract administration procedures and operations management

- Financial Structure and Total Economic Value
Non-volume related initiative commitments
Volume related commitments
Price support for products purchased from supplier
Performance incentives
Commissions

- Team Experience, Commitment and References
Qualifications of respondent and personnel committed to the contract
Past experience in maximizing similar beverage-related opportunities
Resources available to assure meeting an aggressive transition and implementation schedule

SECTION 6 - GENERAL CONTRACTUAL TERMS AND CONDITIONS

6-1 AGREEMENT TERMS AND CONDITIONS

The submission of a proposal herein constitutes the agreement of any Proposer that any Agreement to be drawn as the result of an award herein shall be prepared by the University and shall include at a minimum, all terms and conditions set forth in this RFP. The submission of a proposal shall further constitute the agreement of each Proposer that it will not insist on the use of standard contract agreements, documents, or forms, and that it waives any demand for the use of its standard agreements. The Agreement between the parties shall consistent of, in order of precedence: the agreement document signed by the Parties subsequent to submission of the proposal, and any attachments thereto and incorporations therein, the terms and conditions in the RFP, and the Proposer's response to the RFP.

6-2 ASSIGNMENT

No assignment of this Agreement or of any right accruing under this Agreement shall be made, in part or in whole, by Contractor without the written consent of the University. Notwithstanding any assignment, Contractor shall remain fully liable on this Agreement and shall not be released from performing any of the terms, covenants, and conditions of this Agreement.

6-3 TERMINATION FOR CONVENIENCE

The University may terminate this Agreement, in whole or in part, at any time by written notice to the Contractor. The Contractor shall be paid its reasonable costs, including reasonable close-out costs and a reasonable profit on work performed up to the time of termination. The Contractor shall promptly submit its termination claim for payment. If the Contractor has any property in its possession belonging to the University, the Contractor will account for the same and dispose of it in the manner the University directs.

6-4 TERMINATION FOR DEFAULT

If the Contractor does not deliver the materials in accordance with the Contract delivery schedule, or if the Contract is for services and the Contractor fails to perform in the manner called for in the Contract, or if the Contractor fails to comply with any other provisions of the Contract, the University may terminate this Contract for default. Termination shall be effected by serving on the Contractor a notice of termination setting forth the manner in which the Contractor is in default. The Contractor will be paid a reasonable price for materials delivered and accepted, or services performed in accordance with the manner of performance set forth in the Contract.

6-5 INDEMNIFICATION

Contractor shall indemnify, defend and hold the University and the State of Idaho harmless from and against any and all claims, losses, damages, injuries, liabilities and all costs, including attorneys fees, court costs and expenses and liabilities incurred in or from any such claim, arising from any breach or default in the performance of any obligation on Contractor's part to be performed under the terms of this Agreement, or arising from any act, negligence or the failure to act of Contractor, or any of its agents, subcontractors, employees, invitees or guests. Contractor, upon notice from the University, shall defend the University at Contractor's expense by counsel reasonably satisfactory to the University. Contractor, as a material part of the consideration of the University, hereby waives all claims in respect thereof against the University.

Contractor shall: (a) notify the University in writing as soon as practicable after notice of an injury or a claim is received; (b) cooperate completely with the University and/or the University's insurers in the defense of such injury or claim; and (c) take no steps such as admission of liability which would prejudice the defense or otherwise prevent the University from protecting the University's interests.

6-6 APPLICABLE LAW AND FORUM

This Agreement shall be construed in accordance with, and governed by the laws of the State of Idaho. Any legal proceeding related to this Agreement shall be instituted in the courts of the county of Latah, state of Idaho, and Contractor agrees to submit to the jurisdiction of such courts.

6-7 LAWS, REGULATIONS AND PERMITS

The Contractor shall give all notices required by law and comply with all applicable Federal, State, and local laws, ordinances, rules and regulations relating to the conduct of the work. The Contractor shall be liable for all violations of the law in connection with work furnished by the Contractor, including the Contractor's subcontractors.

6-8 GENERAL QUALITY

All of the Contractor's work shall be performed with the highest degree of skill and completed in accordance with the Agreement Documents.

6-9 PROOF OF COMPLIANCE WITH AGREEMENT

In order that the University may determine whether the Contractor has complied with the requirements of the Agreement Documents, the Contractor shall, at any time when requested, submit to the University properly authenticated documents or other satisfactory proofs as to compliance with such requirements.

6-10 PAYMENT AND ACCEPTANCE

Except as otherwise provided herein, payments shall be due and payable within (30) days after acceptance of such goods or services or after receipt of properly completed invoice, whichever is later. No advance payment shall be made for goods or services furnished pursuant to this Agreement.

6-11 CONTINUATION DURING DISPUTES

The Contractor agrees that notwithstanding the existence of any dispute between the parties, insofar as possible under the terms of the Agreement to be entered into, each party will continue to perform the obligations required of it during the continuation of any such dispute, unless enjoined or prohibited by any court.

6-12 SEVERABILITY

If any term or condition of this Agreement or the application thereof to any person(s) or circumstances is held invalid, such invalidity shall not affect other terms, conditions or applications which can be given effect without the invalid term, condition or application; to this end the terms and conditions of this Agreement are declared severable.

6-13 INTEGRATION

This Agreement constitutes the entire Agreement between the parties. No change thereto shall be valid unless in writing communicated in the stipulated manner, and signed by the University and the Contractor.

6-14 BINDING EFFECT

This Agreement is for the benefit only of the parties hereto and shall inure to the benefit of and bind the parties hereto and their respective heirs, legal representatives, successors, and assigns.

6-15 APPROPRIATIONS CLAUSE

If the term of this Agreement is longer than one year, the University's obligations and liabilities hereunder are subject to the appropriation of funds from the State of Idaho, which appropriation shall be in the State of Idaho's sole discretion, from revenues legally available to the University for the ensuing fiscal year for the purposes of this

Agreement. If the State of Idaho does not appropriate the funds for the purpose of this Agreement, the Agreement shall terminate and neither party shall have any further obligations hereunder.

6-16 IRS SECTION 501(C)(3) AND SECTION 115 CONSIDERATIONS

If any provision of this Agreement may cause the University to lose its status as an Internal Revenue Code Section 501(c)(3) corporation, this Agreement shall be voidable. In the alternative, at the sole option of the University, the offending provision(s) shall be modifiable such that the provision(s) will no longer cause the University to lose its status as a 501(c)(3) corporation. The terms of the modification shall be subject to agreement in writing by all parties.

6-17 COMPLIANCE WITH GOVERNOR'S EXECUTIVE ORDER

In the event any provision of this Agreement shall cause the University to be in violation of any of the Governor of Idaho's Executive Orders, then this Agreement shall be voidable at the sole option of the University.

6-18 DEBARRED, SUSPENDED OR EXCLUDED

All purchase orders and contracts issued by the University of Idaho are subject to F.A.R. 52.209-6. Supplier warrants that neither supplier or its principals is presently debarred, suspended or proposed for debarment by the Federal Government.

6-19 NON-USE OF NAMES AND TRADEMARKS

Contractor shall not use the name, trade name, trademark, or other designation of the University, or any contraction, abbreviation, or simulation any of the foregoing, in any advertisement or for any commercial or promotional purpose (other than in performing under this Agreement) without the University's prior written consent in each case.

6-20 RISK OF LOSS

Until all improvements, equipment, or goods to be provided under this Agreement are installed on property owned or controlled by University and working properly, Contractor shall bear all risks of all loss or damage to the improvements, equipment, or goods, excluding loss or damage caused by acts, omissions, or negligence of the University. Once all improvements, equipment, or goods to be provided under this Agreement are installed on property owned or controlled by University and working properly, the risk of all loss or damage shall be borne by University, excluding loss or damage caused by acts, omissions, or negligence of the Contractor.

6-21 CONTRACTOR REPRESENTATIONS

Contractor represents and warrants the following: (a) that it is financially solvent, able to pay its debts as they mature, and possessed of sufficient working capital to provide the equipment and goods, complete the services, and perform its obligations required hereunder; (b) that it is able to furnish any of the plant, tools, materials, supplies, equipment, and labor required to complete the services required hereunder and perform all of its obligations hereunder and has sufficient experience and competence to do so; (c) that it is authorized to do business in Idaho, properly licensed by all necessary governmental and public and quasi-public authorities having jurisdiction over it and the services, equipment, and goods required hereunder, and has or will obtain all licenses and permits required by law; and (d) that it has visited the site of the project and familiarized itself with the local conditions under which this Agreement is to be performed.

6-22 REGENTS' APPROVAL

This Agreement may be subject to approval by the Regents of the University of Idaho, and if it is and if such approval is not granted this Agreement shall be void and neither party shall have any further obligations or liabilities hereunder.

6-23 SURVIVAL OF TERMS

The terms and provisions hereof, and all documents being executed hereunder, if any, including, without limitation, the representations and warranties, shall survive this Agreement and shall remain in full force and effect thereafter.

6-24 HEADINGS

The headings contained in this Agreement are for reference purposes only and shall not in any way affect the meaning or interpretation hereof.

6-25 ADDITIONAL ACTS

Except as otherwise provided herein, in addition to the acts and deeds recited herein and contemplated to be performed, executed and/or delivered by the parties, the parties hereby agree to perform, execute and/or deliver or cause to be performed, executed and/or delivered any and all such further acts, deeds and assurances as any party hereto may reasonably require to consummate the transaction contemplated hereunder.

6-26 TIME OF ESSENCE

All times provided for in this Agreement, or in any other document executed hereunder, for the performance of any act will be strictly construed, time being of the essence.

6-27 WAIVER

No covenant, term or condition or the breach thereof shall be deemed waived, except by written consent of the party against whom the waiver is claimed, and any waiver of the breach of any covenant, term or condition shall not be deemed to be a waiver of any other covenant, term or condition herein. Acceptance by a party of any performance by another party after the time the same shall have become due shall not constitute a waiver by the first party of the breach or default of any such covenant, term or condition unless otherwise expressly agreed to by the first party in writing.

6-28 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 (except for financial ability), shall excuse the performance, except for the payment of money, by such party for a period equal to any such prevention, delay or stoppage.

6-29 NO JOINT VENTURE

Nothing contained in this Agreement shall be construed as creating a joint venture, partnership, or agency relationship between the parties.

6-30 INFORMATION TRUE AND CORRECT

All documents, agreements and other information provided to the University by Contractor or which Contractor has caused to be provided to the University are true and correct in all respects and do not omit to state any material fact or condition required to be stated, necessary to make the statement or information not misleading, and there are no other agreements or conditions with respect thereto.

6-31 EQUAL OPPORTUNITY

Contractor represents and agrees that it will not discriminate in the performance of this Agreement or in any matter directly or indirectly related to this Agreement on the basis of race, sex, color, religion, national origin, disability, ancestry, or status as a Vietnam veteran. This non-discrimination requirement includes, but is not limited to, any matter directly or indirectly related to employment. Breach of this covenant may be regarded as a material breach of Agreement.

6-32 PUBLIC RECORDS

The University is a public agency. All documents in its possession are public records. Proposals are public records and will be available for inspection and copying by any person upon completion of the RFP process. If any Proposer claims any material to be exempt from disclosure under the Idaho Public Records Law, the Proposer will expressly agree to defend, indemnify and hold harmless the University from any claim or suit arising from the University's refusal to disclose any such material. No such claim of exemption will be valid or effective without such express agreement. The University will take reasonable efforts to protect any information marked "confidential" by the Proposer, to the extent permitted by the Idaho Public Records Law. Confidential information must be submitted in a separate envelope, sealed and marked "Confidential Information" and will be returned to the Proposer upon request after the award of the contract. It is understood, however, that the University will have no liability for disclosure of such information. Any proprietary or otherwise sensitive information contained in or with any Proposal is subject to potential disclosure.

6-33 UNIVERSITY'S RULES, REGULATIONS, AND INSTRUCTIONS

Contractor will follow and comply with all rules and regulations of the University and the reasonable instructions of University personnel. The University reserves the right to require the removal of any worker it deems unsatisfactory for any reason.

SECTION 7 – INDEMNITY, RISKS OF LOSS, INSURANCE

7-1 RISK OF LOSS

Until all improvements, equipment, or goods to be provided under this Agreement are installed on property owned or controlled by University and working properly, Contractor and its subcontractors of any tier shall bear all risks of all loss or damage to the improvements, equipment, or goods, excluding loss or damage caused by acts, omissions, or negligence of the University. Once all improvements, equipment, or goods to be provided under this Agreement are installed on property owned or controlled by University and working properly, the risk of all loss or damage shall be borne by University, excluding loss or damage caused by acts, omissions, or negligence of the Contractor. Contractors shall require its subcontractors of any tier to bear the same risk of loss and .

7-2 INDEMNIFICATION

Contractor shall indemnify, defend and hold the University and the State of Idaho harmless from and against any and all claims, losses, damages, injuries, liabilities and all costs, including attorneys fees, court costs and expenses and liabilities incurred in or from any such claim, arising from any breach or default in the performance of any obligation on Contractor's part to be performed under the terms of this Agreement, or arising from any act, negligence or the failure to act of Contractor, or any of its agents, subcontractors, employees, invitees or guests. Contractor, upon notice from the University, shall defend the University at Contractor's expense by counsel reasonably satisfactory to the University. Contractor, as a material part of the consideration of the University, hereby waives all claims in respect thereof against the University.

Contractor shall: (a) notify the University in writing as soon as practicable after notice of an injury or a claim is received; (b) cooperate completely with the University and/or the University's insurers in the defense of such injury or claim; and (c) take no steps such as admission of liability which would prejudice the defense or otherwise prevent the University from protecting the University's interests.

7-3 Insurance

7.3.1 General Requirements

7.3.1.1 Contractor and its subcontractor(s) of any tier are required to carry the types and limits of insurance shown in this insurance clause, section 8.0, and to provide University with a Certificate of Insurance ("certificate"). All certificates shall be coordinated by the Contractor and provided to the University within seven (7) days of the signing of the contract by the Contractor. Certificates shall be executed by a duly authorized representative of each insurer, showing compliance with the insurance requirements set forth below. All certificates shall provide for thirty (30) days' written notice to University prior to cancellation, non-renewal, or other material change of any insurance referred to therein as evidenced by return receipt of United States certified mail. Said certificates shall evidence compliance with all provisions of this section 8.0. Exhibit A of this Agreement contains a Request for Certificate of Insurance which shall be given to the insurance broker or agent of the Contractor and its subcontractor(s) of any tier, upon award of bid to Contractor.

7.3.1.2 Additionally and at its option, Institution may request certified copies of required policies and endorsements. Such copies shall be provided within (10) ten days of the Institution's request.

7.3.1.3 All insurance required hereunder shall be maintained in full force and effect with insurers with Best's rating of AV or better and be licensed and admitted in Idaho. All policies required shall be written as primary policies and not contributing to nor in excess of any coverage University may choose to maintain. Failure to maintain the required insurance may result in termination of this Agreement at University's option.

7.3.1.4 All policies except Workers Compensation and Professional Liability shall name University as Additional Insured. The Additional Insured shall be stated as: "State of Idaho and The Regents of the University of Idaho". Certificate Holder shall read: "University of Idaho." Certificates shall be mailed to: University of Idaho, Risk Management, P.O. Box 443162, Moscow, ID 83844-3162.

7.3.1.5 Failure of University to demand such certificate or other evidence of full compliance with these insurance requirements or failure of Institution to identify a deficiency from evidence that is provided shall not be construed as a waiver of the obligation of Contractor and its subcontractor(s) of any tier to maintain such insurance.

7.3.1.6 No Representation of Coverage Adequacy. By requiring insurance herein, University does not represent that coverage and limits will necessarily be adequate to protect Contractor and its subcontractor(s) of any tier, and such coverage and limits shall not be deemed as a limitation on the liability of the Contractor and its subcontractor(s) of any tier under the indemnities granted to University in this Agreement.

8.1.7 Contractor is responsible for coordinating the reporting of claims and for the following: (a) notifying the Institution in writing as soon as practicable after notice of an injury or a claim is received; (b) cooperating completely with University in the defense of such injury or claim; and (c) taking no steps (such as admission of liability) which will prejudice the defense or otherwise prevent the University from protecting its interests.

7.3.2 Required Insurance Coverage.

Contractor and its subcontractor(s) of any tier shall at its own expense obtain and maintain:

7.3.2.1 Commercial General and Umbrella / Excess Liability Insurance. Contractor and its subcontractor(s) of any tier shall maintain Commercial General Liability ("CGL") written on an occurrence basis and with a limit of not less than $1,000,000 each occurrence and in the aggregate. If such CGL insurance contains a general aggregate limit, it shall apply separately by location and shall not be less than $1,000,000. CGL insurance shall be written on standard ISO occurrence form (or a substitute form providing equivalent coverage) and shall cover liability arising from premises, operations, independent contractors, products-completed operations, personal injury and advertising injury, and liability assumed under a contract including the tort liability of another assumed in a business contract. Waiver of subrogation language shall be included. If necessary to provide the required limits, the Commercial General Liability policy's limits may be layered with a Commercial Umbrella or Excess Liability policy.

7.3.2.2 Commercial Auto Insurance. Contractor and its subcontractor(s) of any tier shall maintain a Commercial Auto policy with a Combined Single Limit of not less than $1,000,000; Underinsured and Uninsured Motorists limit of not less than $1,000,000; Comprehensive; Collision; and a Medical Payments limit of not less than $10,000. Coverage shall include Non-Owned and Hired Car coverage. Waiver of subrogation language shall be included.

7.3.2.3 Business Personal Property. Contractor and its subcontractor(s) of any tier shall purchase insurance to cover Business Personal Property of Contractor and its subcontractor(s) of any tier. In no event shall University be liable for any damage to or loss of personal property sustained by Contractor, even if such loss is caused by the negligence of Institution, its employees, officers or agents. Waiver of subrogation language shall be included.

7.3.2.4 Workers' Compensation. Contractor and its subcontractor(s) of any tier shall maintain all coverage statutorily required of the Contractor and its subcontractor(s) of any tier, and coverage shall be in accordance with the laws of Idaho. Contractor and its subcontractor(s) of any tier shall maintain Employer's Liability with limits of not less than $100,000 / $500,000 / $100,000.

7.3.2.4 Professional Liability. If professional services are supplied to Institution, Contractor and its subcontractor(s) of any tier, Contractor and its subcontractor(s) of any tier shall maintain Professional Liability (Errors & Omissions) insurance on a claims made basis, covering claims made during the policy period and reported within three years of the date of occurrence. Limits of liability shall be not less than one million dollars ($1,000,000).

UNIVERSITY OF IDAHO
GENERAL TERMS AND CONDITIONS

1. THIS ORDER EXPRESSLY LIMITS ACCEPTANCE TO THE TERMS AND CONDITIONS STATED HEREIN. ALL ADDITIONAL OR DIFFERENT TERMS PROPOSED BY CONTRACTOR ARE OBJECTED TO AND ARE HEREBY REJECTED, UNLESS OTHERWISE PROVIDED FOR IN WRITING BY THE PURCHASING MANAGER, UNIVERSITY OF IDAHO.

2. CHANGES: No alteration in any of the terms, conditions, delivery, price, quality, quantity or specifications of this order will be effective without the written consent of the University of Idaho Department of Purchasing Services.

3. PACKING: No charges will be allowed for special handling, packing, wrapping, bags, containers, etc., unless otherwise specified.

4. DELIVERY: For any exceptions to the delivery date as specified on the order, Contractor shall give prior notification and obtain approval thereto from the University of Idaho Department of Purchasing Services. With respect to delivery under this order, time is of the essence and order is subject to termination for failure to deliver within the timeframe specified in this order.

5. SHIPPING INSTRUCTIONS: Unless otherwise instructed, all goods are to be shipped prepaid and allowed, FOB Destination.

6. ORDER NUMBERS: Agreement order numbers or purchase order numbers shall be clearly shown on all acknowledgments, shipping labels, packing slips, invoices, and on all correspondence.

7. REJECTION: All goods, materials, or services purchased herein are subject to approval by the University of Idaho. Any rejection of goods, materials, or services resulting from nonconformity to the terms, conditions or specifications of this order, whether the goods are held by the University of Idaho or returned, will be at Contractor's risk and expense.

8. QUALITY STANDARDS: Brand names, models, and specifications referenced in herein are meant to establish a minimum standard of quality, performance, or use required by the University. No substitutions will be permitted without written authorization of the University of Idaho Department of Purchasing Services.

9. WARRANTIES: Contractor warrants that all products delivered under this order shall be new, unless otherwise specified, free from defects in material and workmanship, and shall be fit for the intended purpose. All products found defective shall be replaced by the Contractor upon notification by the University of Idaho. All costs of replacement, including shipping charges, are to be borne by the Contractor.

10. PAYMENT, CASH DISCOUNT: Invoices will not be processed for payment nor will the period of computation for cash discount commence until receipt of a properly completed invoice or invoiced items are received and accepted, whichever is later. If an adjustment in payment is necessary due to damage or dispute, the cash discount period shall commence on the date final approval for payment is authorized. Payment shall not be considered late if a check or warrant is available or mailed within the time specified.

11. LIENS, CLAIMS AND ENCUMBRANCES: Contractor warrants and represents that all the goods and materials delivered herein are free and clear of all liens, claims or encumbrances of any kind.

12. TERMINATION: In the event of a breach by Contractor of any of the provisions of this Agreement, the University of Idaho reserves the right to cancel and terminate this Agreement forthwith upon giving written notice to the Contractor. Contractor shall be liable for damages suffered by the University of Idaho resulting from Contractor's breach of Agreement.

13. TRADEMARKS: Contractor shall not use the name, trade name, trademark, or any other designation of the University, or any contraction, abbreviation, adaptation, or simulation of any of the foregoing, in any advertisement or for any commercial or promotional purpose (other than in performing under this Agreement) without the University's prior written consent in each case.

14. OSHA REGULATIONS: Contractor guarantees all items, or services, meet or exceed those requirements and guidelines established by the Occupational Safety and Health Act.

15. TAXES: The University of Idaho is exempt from payment of Idaho State Sales and Use Tax. In addition, the University is generally exempt from payment of Federal Excise Tax under a permanent authority from the District Director of the Internal Revenue Service. Exemption certificates will be furnished as required upon written request by Contractor. If Contractor is required to pay any taxes incurred as a result of doing business with the University of Idaho, it shall be solely responsible for the payment of those taxes. If Contractor is performing public works construction, it shall be responsible for payment of all sales and use taxes.

16. 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.

17. ASSIGNMENTS: No Agreement, order, or any interest therein shall be transferred by Contractor to any other party without the approval in writing of the Purchasing Manager, University of Idaho. Transfer of an Agreement without approval may cause the recission of the transferred Agreement at the option of the University of Idaho.

18. WAIVER: No covenant, term or condition, or the breach thereof, shall be deemed waived, except by written consent of the party against whom the waiver is claimed, and any waiver of the breach of any covenant, term, or condition herein. Acceptance by a party of any performance by another party after the time the same shall have become due shall not constitute a waiver by the first party of the breach or default unless otherwise expressly agreed to in writing.

19. 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 thereof, 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 (except for financial ability), shall excuse the performance by such party for a period equal to any such prevention, delay or stoppage.

20. NO JOINT VENTURE: Nothing contained in this Agreement shall be construed as creating a joint venture, partnership, or employment or agency relationship between the parties.

21. PRICE WARRANTY FOR COMMERCIAL ITEMS: Contractor warrants that prices charged to the University of Idaho are based on Contractor's current catalog or market prices of commercial items sold in substantial quantities to the general public and prices charged do not exceed those charged by Contractor to other customers purchasing the same item in like or comparable quantities.

22. NONDISCRIMINATION: Contractor represents and agrees that it will not discriminate in the performance of this Agreement or in any matter directly or indirectly related to this Agreement on the basis of race, sex, color, religion, national origin, disability, ancestry, or status as a Vietnam veteran. This non-discrimination requirement includes, but is not limited to, any matter directly or indirectly related to employment. Breach of this covenant may be regarded as a material breach of Agreement.

23. UNIVERSITY REGULATIONS: Contractor shall follow and comply with all rules and regulations of the University and the reasonable instructions of University personnel.

24. GOVERNING LAW: This Agreement shall be construed in accordance with, and governed by the laws of the State of Idaho. Any legal proceeding related to this Agreement shall be instituted in the courts of the county of Latah, state of Idaho, and Contractor agrees to submit to the jurisdiction of such courts.

Exhibit A – Request for Certificate of Insurance from Contractor*
***If bid is awarded to Contractor**
Page 1 of 2

Give this form to your insurance agent / broker

Agents/ Brokers: RETURN A COPY OF THESE INSTRUCTIONS WITH YOUR CERTIFICATE.

Certificates without a copy of these instructions will not be accepted.

Contractor and its subcontractors of any tier ("Insured") are required to carry the types and limits of insurance shown in this Request, and to provide University of Idaho ("Certificate Holder") with a Certificate of Insurance within seven (7) days of the signing of this Contract.

- Certificate Holder shall read:

  State of Idaho and the Regents of the University of Idaho
  Attn: Risk Management
  P.O. Box 443162
  Moscow, ID 83844-3162

- Description area of certificate shall read: Attn: Contract for Services

- All certificates shall provide for thirty (30) days' written notice to Certificate Holder prior to cancellation or material change of any insurance referred to in the certificate.

- All insurers shall have a Best's rating of AV or better and be licensed and admitted in Idaho.

- All policies required shall be written as primary policies and not contributing to nor in excess of any coverage Certificate Holder may choose to maintain.

- All policies (except Workers Compensation and Professional Liability) shall name the following as Additional Insured: The Regents of the University of Idaho, a public corporation, state educational institution, and a body politic and corporate organized and existing under the Constitution and laws of the state of Idaho.

- Failure of Certificate Holder to demand a certificate or other evidence of full compliance with these insurance requirements or failure of Certificate Holder to identify a deficiency from evidence that is provided shall not be construed as a waiver of Insured's obligation to maintain such insurance.

- Failure to maintain the required insurance may result in termination of this grant or contract at the Certificate Holder's option.

- By requiring this insurance, Certificate Holder does not represent that coverage and limits will necessarily be adequate to protect Insured, and such coverage and limits shall not be deemed as a limitation on Insured's liability under the terms of the grant or contract.

- A copy of this certificate request must be sent with the Certificate.

Exhibit A – Request for Certificate of Insurance from Contractor*
***If bid is awarded to Contractor**
Page 2 of 2

Required Insurance Coverage. Insured shall obtain insurance of the types and in the amounts described below.

- Commercial General and Umbrella Liability Insurance. Insured shall maintain commercial general liability (CGL) and, if necessary, commercial umbrella insurance with a limit of not less than $1,000,000 each occurrence and in the aggregate. If such CGL insurance contains a general aggregate limit, it shall apply separately by location and shall not be less than $1,000,000. CGL insurance shall be written on standard ISO occurrence form (or a substitute form providing equivalent coverage) and shall cover liability arising from premises, operations, independent contractors, products-completed operations, personal injury and advertising injury, and liability assumed under an insured contract including the tort liability of another assumed in a business contract. Waiver of subrogation language shall be included. If necessary to provide the required limits, the Commercial General Liability policy's limits may be layered with a Commercial Umbrella or Excess Liability policy.

- Commercial Auto Insurance. Insured shall maintain a Commercial Automobile Policy with a Combined Single Limit of not less than $1,000,000; Underinsured and Uninsured Motorists limit of not less than $1,000,000; Comprehensive; Collision; and a Medical Payments limit of not less than $5,000. Coverage shall include Non-Owned and Hired Car coverage. Waiver of subrogation language shall be included.

- Business Personal Property and/or Personal Property. Insured shall purchase insurance to cover Insured's personal property. In no event shall Certificate Holder be liable for any damage to or loss of personal property sustained by Insured, whether or not insured, even if such loss is caused by the negligence of Certificate Holder, its employees, officers or agents.

- Workers' Compensation. Where required by law, Insured shall maintain all statutorily required Workers Compensation coverages. Coverage shall include Employer's Liability, at minimum limits of $100,000 / $500,000 / $100,000.

- Professional Liability. If professional services are supplied to the Institution, Insured shall maintain Professional Liability (Errors & Omissions) insurance on a claims made basis, covering claims made during the policy period and reported within three years of the date of occurrence. Limits of liability shall be not less than one million dollars ($1,000,000).

If you have additional questions, please contact:

University of Idaho - Risk
Phone: 208-885-7177
Email: risk@uidaho.edu

UI-787

University of Idaho

Contracts & Purchasing Services

REQUEST FOR PROPOSALS NO. 16-39M

RESPONSE

Coca-Cola

SWIRE COCA-COLA, USA

February 1, 2016

University of Idaho

REQUEST FOR PROPOSAL NO. 16-39M- RESPONSE- SWIRE COCA-COLA, USA

TABLE OF CONTENT:

University of Idaho

REQUEST FOR PROPOSAL NO. 16-39M- RESPONSE- SWIRE COCA-COLA, USA

2-2 A- UNIVERSITY OF IDAHO REQUEST FOR PROPOSALS NO. 16-39M

PROPOSAL RESPONSE CERTIFICATION

January 22, 2016
DATE

The undersigned, as Proposer, declares that they have read the Request for Proposals, and that the following proposal is submitted on the basis that the undersigned, the company, and its employees or agents, shall meet, or agree to, all specifications contained therein. It is further acknowledged that addenda numbers 1 to 4 have been received and were examined as part of the RFP document.

John E. Pelo
Name

John E. Pelo
Signature

President and CEO
Title

Swire Coca-Cola, USA
Company

12634 South 265 West
Street Address

Draper, Utah 84020
City, State, Zip

1-801-816-5383
Telephone Number

Cell Phone Number

jpelo@swirecc.com
E-mail Address

Delaware
State of Incorporation

87-0424812
Tax ID Number

Business Classification Type (Please check mark if applicable):

Minority Business Enterprise (MBE) _____

Women Owned Business Enterprise (WBE) _____

Small Business Enterprise (SBE) _____

Veteran Business Enterprise (VBE) _____

Disadvantaged Business Enterprise (DBE) _____

Business Classification Type is used for tracking purposes, not as criteria for award.

University of Idaho

University of Idaho

Purchasing Services
1028 West Sixth Street
Moscow, Idaho 83844-2006
208-885-6123
208-885-6060
juliam@uidaho.edu

Date: December 3, 2015

To: All Interested Proposers

From: Julia R. McIlroy, Director

Subject: Request for Proposals No. 16-39M ~ Pouring & Vending Services

This letter will serve as Addendum Number One to the above referenced Request for Proposals. The following changes have been made:

Fiscal Year 2015 – July 1, 2014 – June 30, 2015

- 8907 cases — Drinks to Sodexo B&C accounts
- 3668 items — All products sold to University of Idaho (retail)
- 6131 gallons — All fountain syrup sold to Sodexo
- $179, 207 gross – Vending sales

The closing date, and all terms and conditions of the RFP remain the same.

Failure to acknowledge this addendum may result in rejection of your proposal. Acknowledgement should accompany your offer.

If you need additional information, please call (208) 885-6123, or e-mail juliam@uidaho.edu.

Thank you for your interest in the University of Idaho.

Swire Coca-Cola, USA
(Company)

John B Pelo
(Signature)

University of Idaho

University of Idaho

Purchasing Services
1028 West Sixth Street
Moscow, Idaho 83844-2006
208-885-6123
208-885-6060
juliam@uidaho.edu

Date: December 9, 2015

To: All Interested Proposers

From: Julia R. McIlroy, Director

Subject: Request for Proposals No. 16-39M ~ Pouring & Vending Services

This letter will serve as Addendum Number Two to the above referenced Request for Proposals. The following change has been made:

- Proposals are due February 1, 2015 by 5:00pm

All terms and conditions of the RFP remain the same.

Failure to acknowledge this addendum may result in rejection of your proposal. Acknowledgement should accompany your offer.

If you need additional information, please call (208) 885-6123, or e-mail juliam@uidaho.edu.

Thank you for your interest in the University of Idaho.

Swire Coca-Cola, USA

(Company)

John Peles

(Signature)

University of Idaho

REQUEST FOR PROPOSAL NO. 16-39M- RESPONSE- SWIRE COCA-COLA, USA

Purchasing Services
1028 West Sixth Street
Moscow, Idaho 83844-2006
208-885-6123
208-885-6060
juliam@uidaho.edu

Date: December 10, 2015

To: All Interested Proposers

From: Julia R. McIlroy, Director

Subject: Request for Proposals No. 16-39M ~ Pouring & Vending Services

This letter will serve as Addendum Number Three to the above referenced Request for Proposals. The following changes have been made:

- University of Idaho – Student Population (Moscow, Idaho only):

  Total students: 10,367

  Fall 2015 Residence Halls students: 1789

  University Apartments students: 226

  Off-campus students: 8352

The closing date, and all terms and conditions of the RFP remain the same.

Failure to acknowledge this addendum may result in rejection of your proposal. Acknowledgement should accompany your offer.

If you need additional information, please call (208) 885-6123, or e-mail juliam@uidaho.edu.

Thank you for your interest in the University of Idaho.

Swire Coca-Cola, USA
(Company)

John E Pelo
(Signature)

University of Idaho

REQUEST FOR PROPOSAL NO. 16-39M- RESPONSE- SWIRE COCA-COLA, USA

University of Idaho

Purchasing Services
1028 West Sixth Street
Moscow, Idaho 83844-2006
208-885-6123
208-885-6060
juliam@uidaho.edu

Date: December 23, 2015

To: All Interested Proposers

From: Julia R. McIlroy, Director

Subject: Request for Proposals No. 16-39M ~ Pouring & Vending Services

This letter will serve as Addendum Number Four to the above referenced Request for Proposals. The following additions/changes have been made:

- Pepsi Co./Idaho Beverages – Q & A
- Coca-Cola/Swire CC – Q&A

The closing date, and all terms and conditions of the RFP remain the same.

Failure to acknowledge this addendum may result in rejection of your proposal. Acknowledgement should accompany your offer.

If you need additional information, please call (208) 885-6123, or e-mail juliam@uidaho.edu.

Thank you for your interest in the University of Idaho.

Swire Coca-Cola, USA
(Company)

(Signature)

2-2 B. HISTORY AND BACKGROUND:

In 1816 John Swire & Sons began operations in Liverpool, England as a trading company. In 1866 the company initiated a trade with China and established its first Far East office in Shanghai. From this foothold in the orient, the family eventually established headquarters in Hong Kong, where our parent company Swire Pacific Ltd. has remained to this day.

Over the years Swire Pacific Ltd. has diversified its business holdings and continued to grow each industry sector at impressive rates. Swire is currently one of Hong Kong's leading publicly quoted companies with worldwide interests in aviation, property development, marine services, beverage production & distribution, engineering, cold storage, agriculture, and a variety of trading companies.

In 1965 Swire purchased the Coca-Cola bottling franchise in Hong Kong. It has since become the exclusive Coca-Cola bottler in Taiwan and in seven provinces in Mainland China.

In 1978, desiring to expand its soft drink business beyond Asia, Swire purchased the franchise rights for the Coca-Cola bottler in Salt Lake City, Utah. Over the ensuing years Swire continued to purchase other surrounding franchised bottlers and distributors. Today Swire's US-based bottler is named Swire Coca-Cola, USA and operates 2 production and thirty-five distribution centers in thirteen western states. The company employs over 1,800 people and is the third largest independent Coca-Cola bottler in the United States.

Together with all other Swire operating companies, Swire Coca-Cola, USA continues to hold fast to the traditions of integrity, commitment, hard work, and family unity that were first instilled by John Swire & Sons so many years ago. As a dedicated partner with the Coca-Cola Company, Swire Coca-Cola, USA will continue to achieve growth and success for years to come

2-2 C. REFERENCES:

Washington State University
Contact- Gary Coyle
Title- Director of Dining Services
Address- Rogers 123 P.O. Box 646005 Pullman, WA 99164
Phone Number- 1-509-335-7039
Email Address- gcoyle@wsu.edu

University of Utah
Contact- Michael Van Oordt
Title- Contract Administration
Address- Benchmark, Bldg. 822, 5 Heritage Center Salt Lake City, UT 84112
Phone Number- Ph. 801-587-0853, Fax 801-585-9926
Email Address- mvanoordt@sa.utah.edu

Boise State University
Contact- Kim Thomas
Title- Executive Director Campus Services
Address- 1910 University Drive Boise, ID 83725-1335
Phone Number- 1-208-426-3048
Email Address- kthomas@boisestate.edu

Brigham Young University
Contact- Dean Wright
Title- Director of Dining Services
Address- 685 East University Parkway Provo, Utah 84604
Phone Number- 1-801-422-4935
Email Address- dean.r.wright@byu.edu

Colorado State University
Contact- Amy Parsons
Title- Executive Vice Chancellor
Address- 475 17th Street, Denver, CO 80202, Suite 1550
Phone number(s) - 303-376-2606 (Assistant Melanie Geary)
Email Address- Amy.Parsons@Colostate.edu

Walla Walla Community College
Contact Name – Steven L. VanAusdle
Title – President
Address – 500 Tausick Way
Phone Number – (509) 527-4274
Email – steven.vanausdle@wwcc.edu

2-2 D. EXPERIENCE AND SUPPORT: EXPERIENCE/CONTRACT ADMINISTRATION/BEVERAGE PLAN

EXPERIENCE

Swire Coca-Cola, USA is an independent owned and operated Coca-Cola franchise operating in thirteen western states and thirty-five sales center locations. Locally, Swire Coca-Cola, USA is located in Lewiston Idaho. Swire Coca-Cola, USA- Northwest Division, which Lewiston is part, is your local Coca-Cola bottler employing 131 local Northwest employees supporting the local economy.

Swire Coca-Cola, USA has extensive experience in the College and University Channel; currently managing the Coca-Cola business for several world-class universities; including Washington State University located in Pullman Washington, Walla-Walla Community College- Walla-Walla and Clarkston and Whitman College- Walla-Walla. Swire Coca-Cola, USA has operated in the United States since 1978. John Swire and Sons will celebrate their 200th anniversary in 2016.

Swire Coca-Cola, USA understands the College and University environment and student needs. Swire Coca-Cola, USA products and services cater to all facets of university needs, including; dining, concessions, retail, vending, athletics and student life. Through continuous innovation and improvement, Swire Coca-Cola, USA will continue to meet the needs of the University of Idaho students, staff and administration.

Swire Coca-Cola, USA Team: Beverage Experience

- Julie Jackson – Foodservice/On-Premise Manager – 16 Years
- Troy Hotchkiss – Sales Center Manager Lewiston – 16 Years
- Andy Colpitts – Service Manager – 30 Years
- Mike Yates -- Full Service Vending Distribution – 28 Years
- Wayne Hochhalter Foodservice/On-Premise Sales – 35 Years
- Todd Hewett – Full Service Vending Distribution – 26 Years
- Randall Cain – Northwest FSOP Division Manager – 38 Years
- Dave Heaps- Director- Foodservice/On-Premise - 35 Years
- Paul Roberts- Foodservice/On-Premise Marketing Manager- 8 Years
- Jeff Deitrick – Northwest Division Manager – 19 Years
- Raleigh Lockhart – VP Foodservice/On-Premise – 34 Years
- Jack Pelo – President & CEO – 40 Years
-

Combined Beverage Experience 325 years

CONTRACT ADMINISTRATION: COMMUNICATION/BUSINESS REVIEWS/REPORTING

COMMUNICATION

The staff of Swire Coca-Cola, USA-Lewiston represents the local support team for University of Idaho. Julie Jackson- Foodservice/On-Premise Manager is your main contact. Additional support for product and service request is available 24-7 through the Swire Coca-Cola, USA Service and Support Line- 1-800-659-4395.

The following individuals are available as needed or required:

- Account Executive- Julie Jackson- 208-816-0036
- Service- Andy Colpitts- 208-791-8716.
- Sales- Kenneth Hochhalter- 208-790-3928
- Distribution- Chad Kauffman- 208-816-6520
- Sales Center Manager- Troy Hotchkiss- 208-816-0561

BUSINESS REVIEWS

Formal business reviews shall be done semi-annually between the Lewiston Support Team and University of Idaho Contracts and Purchasing Services. Scheduling of formal business reviews is at the convenience of the University. The reviews will address sales, marketing, distribution and service goals, performance and serve as an opportunity for develop of strategies for continual improvement.

Sales personnel will be on campus frequently during each month to ensure adequate communication, order fulfillment, marketing plan development and execution. Schedules for sales personnel will be determined with feedback from university personnel.

REPORTING

Sales volume reports are available on-demand to Purchasing Services. Sales volume reports by department will provided during Formal Business Reviews. Monthly commission reports are provided by the 10th of each month for vending services detailing volume, money collected and commission amounts by vendor. Sample reports provided upon request.

BEVERAGE PLAN: OBJECTIVES

Swire Coca-Cola is excited to have the opportunity to share with you our team's commitment to University of Idaho and our ability to drive results within the dynamic and challenging area of higher education.

As we hope this RFP response clearly demonstrates, we have the category knowledge, products, commitment to service, marketing solutions, ability to execute, and the team of experts that can help your beverage business thrive. All of this makes Swire Coca-Cola the right partner for University of Idaho. Our response is a starting point for discussion and we welcome feedback and discussion so that we can build the best possible partnership with University of Idaho.

This is a unique time in higher education and we are excited to have the opportunity to be one of your trusted partners in overcoming the challenges that are present with being a leading institution in this field.

Swire Coca-Cola as a whole, and the team of people that will support your institution, are passionate about the power of education and its importance in shaping the future of our local, national, and global communities. You can be assured that we bring the full resources of The Coca-Cola Company to bear in support of your institution.

If you have any questions about our response or if there is any additional information that we can provide to support your decision making process, please don't hesitate to contact us.

BEVERAGE PLAN: BRANDS/PACKAGES


Preferred Brands & Categories
Water Category
Optimize Your Beverage Offerings!
DASANI - #1 Fastest Growing National Branded Water 1
Great tasting purified water, enhanced with minerals for a pure fresh taste
Flavored Water -A delicious way to add refreshment to your day
Designed to Make a Difference™
1 unique redesigned plastic bottle
2 up to 30% made from plants
3 still 100% recyclable
plantbottle
Twist.
Recycle.
Repeat.
DASANI
SWIRE COCA-COLA, USA
*DASANI's plant bottle replaces some non-renewable petroleum or fossil based resources used in conventional PET plastic
1. Beverage Digest Fact Book 2015
The Coca-Cola Advantage

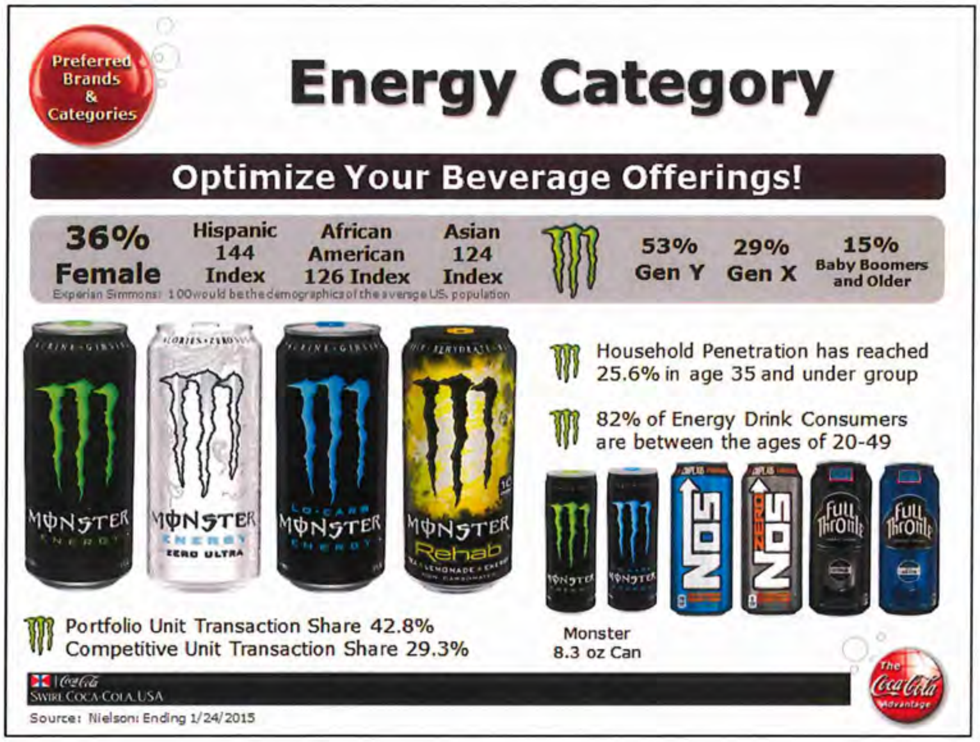

Preferred Brands & Categories
Water Category
Optimize Your Beverage Offerings!
Dasani® Sparkling
#1 Fastest Growing National Branded Water 1
DASANI® Sparkling 20oz
✓Sparkling Water is growing +16%
✓Double-digit growth through 2020!
✓Refreshing flavor and fizz, in a
✓Healthy zero calorie, for a healthy alternative
DASANI sparkling
Available January 2016
Available March 2016
BERRY
LIME
SWIRE COCA-COLA, USA
The Coca-Cola Advantage


Preferred Brands & Categories
Water Category
Optimize Your Beverage Offerings!
smartwater - #1 Premium Water in the U.S.A.
Vapor distilled water for a purity you can taste and hydration you can feel 2
smartwater
✓Zero calories
✓Enhanced with a purposeful blend of electrolytes
ZICO – 100% Natural Coconut Water!!! Not made from Concentrate
ZICO
16.9 oz. pkg. Available March 2016
✓ZICO has 5 essential electrolytes
✓ More potassium than a banana
✓Zero fat and cholesterol
✓No added sugar
✓Gluten Free
SWIRE COCA-COLA, USA
1. Nielsen Annual 2010-1014
2. Nielsen Scantrack, AMC, YTD 4/27/13
The Coca-Cola Advantage


Preferred Brands & Categories
Water Category
Optimize Your Beverage Offerings!
The pure crisp taste of smartwater ® is now sparkling
smartwater®
Sparkling
✓Sparkling water is a strong fit for smartwater® brand, especially among millennials1
✓Sparkling water is driving 37% of water category growth1
✓smartwater® sparkling claimed purchase intent (64%) higher than category leader, San Pellegrino (52%) 2
1 Liter
20oz
Available January 2016
SWIRE COCA-COLA, USA
Sources: 1) Nielsen Scanning 52 W/E Mar 07, 2015; 2) smartwater® sparkling on-shelf evaluation, November 2014
The Coca-Cola Advantage


Preferred Brands & Categories
Enhanced
Water Category
Optimize Your Beverage Offerings!
#1 Enhanced Water with 65.8% Share of the Category*
Formulated from a unique blend of vitamins, natural sweeteners and electrolytes
GLACÉAU vitaminwater
GLACÉAU vitaminwater zero
refresh
recharge
rehydrate
SWIRE COCA-COLA, USA
The Coca-Cola Advantage
*Source: AC Nielsen Swire Full Year 2014


Preferred Brands & Categories
Enhanced
Water Category
Optimize Your Beverage Offerings!
Minute Maid Sparkling
Trusted Juice Brand with 97% Brand Awareness!
✓ Flavored Minute Maid Sparkling Water/Juice drinks are growing at double-digits
✓ 6% Juice Content!
✓ 40 Calories per Bottle
Available March 2016
Sparkling-Still categories represent 260MM EQ and $1.7B
SWIRE COCA-COLA, USA
The Coca-Cola Advantage


Preferred Brands & Categories
Energy Category
Optimize Your Beverage Offerings!
36% Female
Hispanic 144 Index
African American 126 Index
Asian 124 Index
53% Gen Y
29% Gen X
15% Baby Boomers and Older
Experian Simmons: 100 would be the demographics of the average US population
Household Penetration has reached 25.6% in age 35 and under group
82% of Energy Drink Consumers are between the ages of 20-49
Monster 8.3 oz Can
Portfolio Unit Transaction Share 42.8%
Competitive Unit Transaction Share 29.3%
Swire Coca-Cola, USA
Source: Nielson: Ending 1/24/2015
The Coca-Cola Advantage


Preferred Brands & Categories
POWERADE Category
Optimize Your Beverage Offerings!
ION4 Advanced Electrolyte System:
Replaces the four critical electrolytes at the same ratio as they are typically lost in sweat ...and delivers B-vitamins!
POWERADE
Sodium 110mg 100mg
Potassium 30mg 24.2mg
Calcium X 2.5mg
Magnesium X 1.2mg
B Vitamins X 10% rda
Special Olympics WORLD GAMES LOS ANGELES 2015
NCAA
POWERADE Share 57.7%
GATORADE Share 42.3%
Swire Coca-Cola, USA
Source: Nielson Ending 12/2014
The Coca-Cola Advantage


Preferred Brands & Categories
Juice Category
Optimize Your Beverage Offerings!
Minute Maid
Minute Maid - #1 in the Juice Drink Category – Put Good In...Get Good Out!
Complete Balanced Portfolio to Meet Consumers Variety Needs
Minute Maid is committed to meeting the health and nutrition needs of your family!
Portfolio out shares the nearest competitor nearly 2 to 1!
Swire Coca-Cola, USA
1. Nielsen Swire BSA 12/2014
The Coca-Cola Advantage


Preferred Brands & Categories
Tea Category
Optimize Your Beverage Offerings!
Gold Peak Tea
One of the fastest growing brands
Honest tea
Home Brewed Taste Gold Peak
The New Gold Standard in Foodservice Iced Tea
Greener living through commitment to organics, Fair Trade and more sustainable packaging
Fair Trade Certified
USDA Organic
Swire Coca-Cola, USA
*Nielsen 2013/2014 +32.2%
1. Packaged Facts, "Tea and Ready-to-Drink (RTD) Tea in the U.S.: Retail, Foodservice and
The Coca-Cola Advantage

University of Idaho

REQUEST FOR PROPOSAL NO. 16-39M- RESPONSE- SWIRE COCA-COLA, USA


Preferred Brands & Categories
Milk Category
Optimize Your Beverage Offerings!
Great Badge Value, Awesome Taste, Better Nutrition
Fairlife YUP®
✓Preferred over leading brand[1]
✓Made for "Big Kids" 12-24
✓Awesome Tasting!
Chocolate, Vanilla, Strawberry
✓Low Fat (1%) Ultra-Filtered Milk
✓130 Calories (13% Less)
✓9g Protein (13% More)
✓18g Sugar (25% Less)
✓Lactose Free
YUP!
MILK
Available January 2016
Swire Coca-Cola, USA
Source: FONA Taste Test 2014
The Coca-Cola Advantage


Preferred Brands & Categories
Specialty Packages
Optimize Your Beverage Offerings!
Import Brands
✓Nostalgic Look
✓Natural Ingredients
✓ Imported from Mexico
✓ Made with pure cane sugar
✓ Available in 355ml
✓ Ideal package for Mexican restaurants and food trucks
Hispanics prefer ordering a beverage with their food (93% Hispanic over 78% Non-Hispanic)*
*Availability varies by location
Swire Coca-Cola, USA
Source: * For Hispanics, Dining Out Is A Family/Group Affair, Nov 2011; The NPD Group's CREST Hispanic foodservice market research (English, Bilingual, and Spanish survey); Univision/Burke QSR Landscape Research Bring Traffic, trial and Loyalty with Hispanic, Apr 2012
The Coca-Cola Advantage


Preferred Brands & Categories
Specialty Packages
Optimize Your Beverage Offerings!
Liquid Flavor Enhancer
DASANI Drops , POWERADE Drops, Minute Maid Drops
Dasani
1.9 oz
Minute Maid
1.9 oz
✓ Enhance your Water and other Beverages with Drops!
✓ The Liquid Enhancer Category is approaching $2B in Sales!
✓ On the Go Package!
✓ Bundle with a Beverage to Maximize Sales Volume!
Fastest Growing Category!
POWERADE
3.0 oz
Dasani Infusion
1.9 oz
SWIRE COCA COLA USA
1. Beverage Digest Fact Book 2015
The Coca-Cola Advantage

University of Idaho

REQUEST FOR PROPOSAL NO. 16-39M- RESPONSE- SWIRE COCA-COLA, USA

BEVERAGE PLAN: BRAND/PACKAGE

12 PACK	
115583	Classic
116153	CF Classic
121750	Coke Zero
121508	Dt. Coke w/Splenda
115584	Dt. Coke
115585	CF Dt. Coke
119311	Dt. Coke w/Lime
116305	Cherry Coke
116306	Dt. Cherry
125491	Cherry Coke Zero
116662	Vanilla Coke
126819	Vanilla Coke Zero
116456	MM Lite Lem
116472	MM Pink Lem
116320	MM Lemonade
117577	Tab
115586	Sprite
119791	Dt. Sprite Zero
146695	Sprite Cranberry
146700	Sprite Cranberry Zero
116309	Pibb Xtra
117603	Dr. Pepper
137849	Dr. Pepper 10
117604	Dt. Dr. Pepper
117606	CF Dt. Dr. Pepper
133251	Dr. Pepper Cherry
133257	Dt. Dr. Pepper Cherry
120370	Dt. Dr. Pepper Ch/Van
120869	Barq's
117869	Barq's Red Cm.
116308	Dt. Barq's
116307	Fresca
122109	Fresca Peach
122110	Fresca Blk Cherry
117854	Cactus Cooler
116151	Fanta Orange
151151	Fanta Mango
116470	Fanta Grape
116460	Fanta Strawberry
145160	Fuze Lemon Ice Tea
116150	Mello Yello
6 PK CANS	
100960	Classic
100961	Dt. Coke
150564	Coke Life
100963	Sprite
117864	Dr Pepper
7.5OZ CANS	
135245	Classic
135247	Dt. Coke
135246	Coke Zero
135248	Sprite
135277	Dr. Pepper
135278	Dt. Dr. Pepper
135279	Fanta Orange
8oz Glass Bottle	
103172	Classic
150331	Coke Life
129137	Coke Zero
103173	Dt. Coke
103174	Sprite
150873	Dr. Pepper
8.5oz Alum Bottle	
128833	Coke
128832	Coke Zero
131673	Dt. Coke
135291	Sprite
POWERADE ZERO DROPS 3OZ	
146287	MT Berry
146288	Fruit Punch
POWERADE 12OZ 12PK	
144169	Mountain Blast

Mexican Bottle 6PK	
145235	Mexican Coke
Mexican Bottle	
122360	Coke 355M
134846	Fanta 355M
126583	Sprite 355M
146879	Grape 355M
146883	Pineapple 355M
146875	Strawberry 355M
126689	Coke 500M
126627	Fanta 500M
126628	Sprite 500M
SCHWEPPE'S 10OZ	
117404	Tonic
102870	Diet Tonic
117400	Club Soda
117406	Ginger ale
12OZ SUGAR GLASS BTL	
151230	Dr Pepper
SCHWEPPE'S 12OZ 12pk	
145751	Original
145749	Lemon Lime
145753	Black Cherry
8 PK 12OZ. BTL	
125596	Classic
125598	Diet Coke
126534	Sprite
126530	Dr. Pepper
125602	12oz Coke Zero
126528	12oz CF Diet Coke
126532	12oz Dt. Dr Pepper
131687	12oz Fanta Orange
16OZ PET	
132398	Classic
132394	Diet Coke
132400	Sprite
133168	Dr. Pepper
.5 LITER	
102079	Classic
102081	Diet Coke
125675	Coke Zero
102142	CF Diet Coke
102080	Sprite
117724	Dr. Pepper
117816	Dt. Dr. Pepper
16OZ CANS	
144090	Classic
144089	Sprite
145278	Dr Pepper
145835	Cherry Coke
20 PACK CANS	
100933	Classic
100935	Diet Coke
100937	Sprite
117783	Dr Pepper
124359	Coke Zero
117794	Dt. Dr. Pepper
119256	Fanta Orange
24 PACK CANS	
100722	Classic
100724	Diet Coke
123159	Coke Zero
100725	CF Diet Coke
124384	Sprite
123704	Dr. Pepper
123809	Dt. Dr. Pepper
146685	Dr. Pepper 10
146334	Cherry Coke
116015	Fanta Orange
GLCU 12OZ 8PK	
145496	Squeezed
145491	Essential
145493	XXX

20OZ. BTL	
102603	Classic
102604	Diet Coke
102719	CF Dt Coke
121751	Coke Zero
102605	Cherry Coke
125522	Cherry Coke Zero
116598	Vanilla Coke
119263	Dt. Coke W/Lime
150624	Coke Life
117635	Dr Pepper
138502	Dr. Pepper 10
117641	Dt Dr Pepper
133253	Dr Pepper Cherry
133417	Dt Dr Pepper Cherry
101891	Sprite
119790	Dt Sprite Zero
146699	Sprite Cranberry
115964	MM Pink Lemonade
114532	MM Lemonade
151590	Barqs RB
102439	Fresca
115096	Pibb Extra
114230	Fanta Orange
114229	Fanta Strawberry
114306	Fanta Pineapple
144866	Fuze Lemon Ice Tea
102656	Mello Yello
1 LITER	
103486	Classic
103487	Dt. Coke
121331	Cherry Coke
134117	Coke Zero
116664	Vanilla Coke
101969	Sprite
117636	Dr. Pepper
117784	Dt. Dr. Pepper
117403	Sch Tonic
117409	Sch Dt. Tonic
151418	Sch Club Soda
116286	Fanta Orange
101968	Mello Yello
1.25 LITER	
137072	Classic
137073	Dt. Coke
137074	Coke Zero
137075	Sprite
137076	Fanta Orange
138083	Dr. Pepper
138084	Dt. Dr. Pepper
2 LITER	
132530	Classic
132531	Coke Zero
132532	Dt. Coke
132529	Cherry Coke
132528	CF Dt. Coke
132540	Sprite
132539	Diet Sprite Zero
146697	Sprite Cranberry
146702	Sprite Cranberry Zero
132606	Dr. Pepper
137876	Dr. Pepper 10
117642	Dt. Dr. Pepper
132612	MM Pink Lemonade
132551	MM Lemonade
151599	Barqs RB
132545	Fresca
132543	Fanta Orange
151149	Fanta Mango
132544	Fanta Strawberry
132542	Fanta Grape
145158	Fuze Lemon Tea
MONSTER EX STRENGTH	

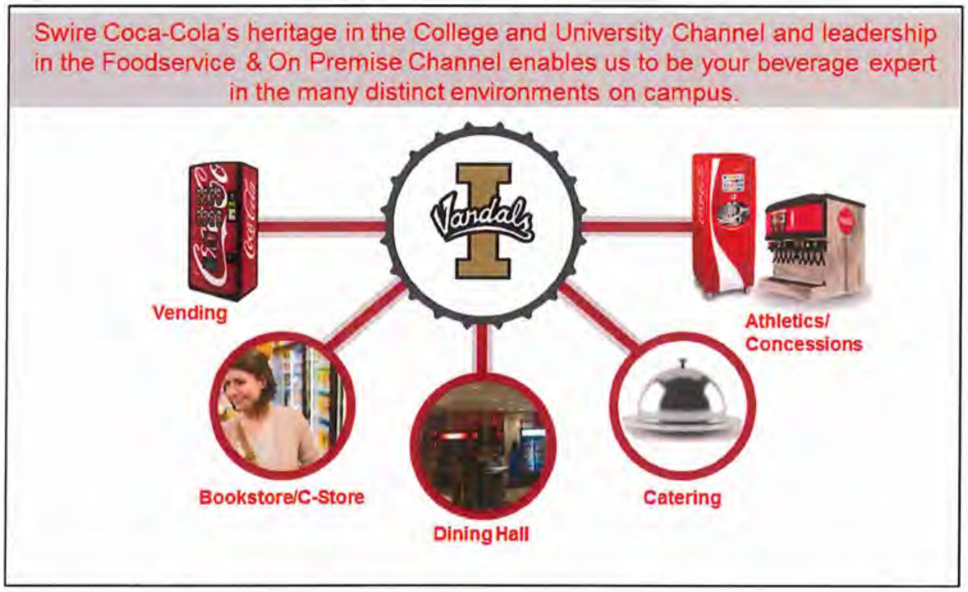
DASANI	
112260	1 Liter
112309	20 oz
121023	20 oz Lemon
121024	20 oz Raspberry
121964	20 oz Strawberry
112261	1.5 Liter
113098	.5 Liter 6 Pack
116366	.5 Liter 24Pk Box
135910	8pk Dasani 12oz
12 PK DASANI	
147101	Spark Berry
147103	Spark Lemon
147099	Spark Lime
150762	Spark Black Cherry
DASANI DROP 1.9OZ	
144873	Strawberry Kiwi
144874	Pink lemonade
144875	Pineapple
144876	Mix berry
150878	Infusion Lime
150879	Infusion Strawberry Basil
SMARTWATER	
129252	1 Liter
135239	1 Liter 6 pack
129253	1.5 Liter
132296	700ml
145098	.5 Lt 6 pack
129254	20oz LS
FRUIT WATER 16.9OZ	
145913	Fruit Black
145917	Fruit Orange
145919	Fruit Strawberry
145915	Fruit Lemon Lime
145911	Fruit Watermelon
147091	Fruit Fizzy
147093	Fruit Tropical
MINUTE MAID 450ML	
119707	Orange Juice
119702	Apple Juice
119705	Pink Grapefruit
119703	Cran-Apple-Rasp
119706	Cranberry Grape
144171	Stawbrypass
146960	Tropical
146962	Berry Blend
MINUTE MAID 10OZ	
124581	MM Orange Juice
124580	MM Apple Juice
MM DROPS 1.9OZ	
147095	Lemonade
147097	Fruit Punch
147098	Mango Tropical
147096	Raspberry Lemonade
12 PK TUM-E YUMMIES	
135589	Fruitabulous
135479	Very Berry Blue
135478	Orangearefic
135481	Green apple
135482	Sour raspberry
16.9Z HONEST TEA	
132861	Honey Green
136525	Half & Half
147627	Peach Tea
147628	Pomegranate Blue HT
147629	Orange Mango HT
59Z HONEST TEA	
145180	Honey Green
145181	Half & Half
150949	Peach Tea
MUSCLE MONSTER 15OZ	
145740	Chocolate
145739	Vanilla

University of Idaho

REQUEST FOR PROPOSAL NO. 16-39M- RESPONSE- SWIRE COCA-COLA, USA

144170	Fruit Punch	GLCU 500ML		145386	12oz Antigravity	146820	Strawberry
145482	Mix Berry Zero	142716	XXX	145385	12oz Super Dry	150319	Peanut Butter Cup
POWERADE 20 OZ		142717	Power-C	MONSTER 16OZ		151515	Banana
102752	Fruit Punch	142718	Revive	128092	Monster	FULL THROTTLE	
117687	Orange	142719	XXX Zero	123195	Monster Lo-Carb	145932	12oz Full Throttle 6pk
101728	Mountain Blast	142720	Squeezed Zero	128086	Assault	119451	16oz Full Throttle
123292	Grape	142721	Rise Zero	123409	Khaos	135565	16oz Blue Demon
102751	Lemon Lime	GLCU 20OZ		137564	Abs Zero	NOS	
129294	Strawberry Lemonade	129093	Power-C	144775	Ultra Zero	145996	12oz NOS 6pk
POWERADE ZERO 20OZ		129097	XXX	145697	Ballers Blend	128259	16oz NOS
130471	Mix Berry Zero	129095	Revive	145706	Mad Dog	145998	16oz Zero
137799	Fruit Punch Zero	129088	Energy	145744	Ultra Blue	130493	16oz Grape
20 OZ 8PK POWERADE		129089	Essential	146758	Ultra Red	147246	16oz Citrus (Charged)
125624	Fruit Punch	129090	Focus	150647	Ultra Sunrise	146871	16 Citrus (Charged) Zero
125625	Mountain Blast	145909	Squeezed	151169	Ultra Citron	128037	22oz NOS
125623	Orange	GLCU 20OZ ZERO		150617	Ultra Black Cherry	ILLY ISSIMO COFFEE	
125622	Grape	136109	Go-Go	151608	Pipeline Fruit Punch	150528	11.5oz Cappuccino
POWERADE 32 OZ 15PK		136106	XXX	150760	Unleaded	150529	11.5oz Latte Mocha
135573	WHITE CHRY	136107	Squeezed	150822	Ripper	151557	11.5oz Caffe Vanilla
123367	FPUNCH	136108	Rise	MONSTER REHAB		ZICO	
145967	MELON	137765	Glow	138121	Rehab Lemonade	144653	11.2oz Natural
123369	LMNLM	145206	Revive	139144	Rojo Tea + Energy	144651	14oz Natural
123371	MTBLST	145188	Power-C	143960	Orangeade	144659	14oz Chocolate
123372	ORANGE	147186	Focus	145738	Pink Lemonade	145930	14oz Pineapple
126073	GRAPE	GLCU 32oz		151009	Peach	151032	14oz Watermelon/Rasp
129295	Strawberry Lemonade	129258	Power-C	MONSTER 18OZ		144652	1Lt Natural
147201	Tropical Mango	129257	Revive	146816	Monster Import	145309	1Lt Chocolate
151134	Lemonade	129262	Energy	150565	Ubermonster	CORE POWER	
POWERADE ZERO 32 OZ		130629	XXX	MONSTER 24OZ		144830	11.5oz Chocolate
134838	LMNLM ZERO	GOLD PEAK 18.5Z		128998	Monster	144831	11.5oz Vanilla
134837	ORANGE ZERO	135333	Sweetened	128999	Monster Lo	144828	11.5oz Lt. Chocolate
130468	Mix Berry Zero	135334	Diet Tea	138447	Monster Abs Zero	144829	11.5oz Straw Banana
130467	Grape Zero	135335	Lemon Sweetened	147348	Monster Ultra Zero	146676	11.5oz Banana
130466	Strawberry Zero	135336	Green Tea	150126	Rehab Lemonade	YUP MILK	
137763	Fruit Punch Zero	135337	Unsweetened	MONSTER 4pk		151089	14oz Vanilla
POWDER POWERADE ION		143932	Lemonade	121650	Monster	151091	14oz Chocolate
144207	2.5G Fruit Punch	GOLD PEAK 16.6Z 6PK		121651	Monster Lo-Carb	151090	14oz Strawberry
144208	2.5G Mountain Blast	135249	Sweetened	137985	Absolute Zero	PEACE TEA 23Z	
136676	5G Fruit Punch	151044	Unsweetened	145774	Ultra Zero	146294	SW Lemon
136677	5G Mountain Blast	135250	Diet Tea	146755	Ultra Blue	147294	Texas Style
136679	5G Lemon Lime	GOLD PEAK 64Z		147368	Ultra Red	146296	Green Tea
FUZE 1LT		146817	Sweetened	138120	Monster Rehab	146297	Razzle berry
144845	Lemon Tea	147213	Unsweetened	146768	Pink Lemon Rehab	146295	Caddy Shack
144847	Half & Half	150974	Green Tea	151291	Ultra Sunrise	147291	Pink Lemon
146682	Berry Punch	MONSTER 10pk		MONSTER JAVA 12pk		147292	Sno Berry
146683	Strawberry Lemonade	137974	Monster	135113	Loca Moca	147293	Ga Peach
		137976	Monster Lo	135114	Mean Bean	147501	Viva Mango
		144707	Monster Absolute	137253	OL J-Kona Blend		
		144708	Monster Rehab	137254	Lo-Ball-Vanilla Lt		
		146754	Monster Zero Ultra	135116	Irish Blend		
				145737	Kona Cappuccino		

BEVERAGE PLAN: MARKETING/INNOVATION/VALUECREATION



Swire Coca-Cola, USA, working with the University of Idaho, will build a semi-annual Marketing and Merchandising **Calendar** with the goal of enhancing beverage volume, revenue and student life. Swire Coca-Cola, USA provides a fully staffed and talented marketing department to develop and implement localized marketing and merchandising programs at the University of Idaho. In addition to localized programs, The Coca-Cola Company national programs can and will be customized to support the initiatives of volume, profit and student life.

Customized programs are designed for on-campus activation as well a co-branding community program to expand the University of Idaho Vandal image and messaging through local businesses. The following are a few examples of local, national and co-branded programs:

Fall Football Activation and Fuel-up-for-Finals retail activation:

University of Idaho

REQUEST FOR PROPOSAL NO. 16-39M- RESPONSE- SWIRE COCA-COLA, USA

BEVERAGE PLAN: MARKETING/INNOVATION/VALUECREATION

Custom Tumblers, coasters, push/pull static door clings, rail strips for are restaurants, markets and retail locations in Moscow and surrounding communities:

Coaster

Static

Rail Strip

BEVERAGE PLAN: MARKETING/INNOVATION/VALUECREATION

NCAA Basketball activation:

Athletic Marketing:

BEVERAGE PLAN: MARKETING/INNOVATION/VALUECREATION

The Cola-Cola Foundation:

BEVERAGE PLAN: SUSTAINABILITY

As a responsible corporate citizen, we recognize that we have a duty to continually strive to lessen the impact our activities may have on the environment.

Measure and Manage

We are committed to being a good steward of the natural resources and biodiversity under our influence and to ensuring the potential adverse impacts of our operations on the environment are identified and appropriately managed. Now is the time we should be striving to make a difference; it is in our commercial and personal interests to do so. The environmental initiatives we are investing in today are designed to build core competencies that we anticipate will, in future, become core requirements from our customers, investors and other stake holders.

Water

Water resource management continues to be a focus of our bottling facilities as water is not only an essential ingredient in our products, but a medium for maintaining high product quality and hygiene.

Usage Reduction and Conservation

Water conservation measures which include reuse of water for non-sanitary purposes, associate awareness programs, and investing in new technology have helped us decrease our per-unit water usage by over 19 percent, saving 99 million gallons in the past 3 years.

Water Stewardship

Watershed analysis and risk assessment plans developed performed for our Fruitland, Idaho facility

Participation in community water restoration projects in the communities we operate.

Climate

It is a priority for Swire Coca-Cola to both measure our greenhouse gas emissions and work to reduce them.

Cold Drink Equipment

Energy management systems are being retrofitted on our vending machines which reduce energy usage by up to 35 percent.

Facilities and Bottling Plants

12 percent reduction in company energy usage during the past 3 years which has resulted in the elimination of 3,300 metric tons of greenhouse gas emissions annually. Upgrades to high efficiency lighting systems in our offices and warehouses have reduced our annual electrical usage by up to 35 percent

Transportation

- Our fleet consists of 83 Hybrid vehicles
- Utilization of natural gas powered trucks and forklifts
- Optimizing delivery routes to reduce our fleet CO_2 emissions
- Implementation of "no idle" policies
- Installation of governors to limit vehicle speeds, which has decreased annual CO_2 emissions by over 1,100 metric tons annually
- Carbon offset program for airline travel

Waste Management

At Swire we focus first on reducing the amount of waste we generate and then reusing or recycling that waste. When we do generate waste we follow stringent rules to assure it is disposed in the most environmentally friendly manner and in compliance with all regulatory requirements.

Reduce

Over the years, we have been reducing the unit weight of our packages while maintaining our product quality. Our beverage containers are 7-30 percent lighter than those used in 2004 and certain containers are now composed of 30 percent plant based material.

Reuse

We continually search for new and innovative ideas for reusing materials generated in our manufacturing and distribution process. One such initiative is the use of plastic reusable shells for delivery of many of our products. In addition, 55-gallon syrup barrels are utilized both for recycling bins and donated to the public.

Recycle

We have an internal focus on the total amount of waste generated as well as the amount of material we recycle. Our internal recycling rates are in excess of 89 percent.

Some of the materials we recycle

- Paper
- Cardboard
- Plastic
- Metals
- Electronic equipment

Partners

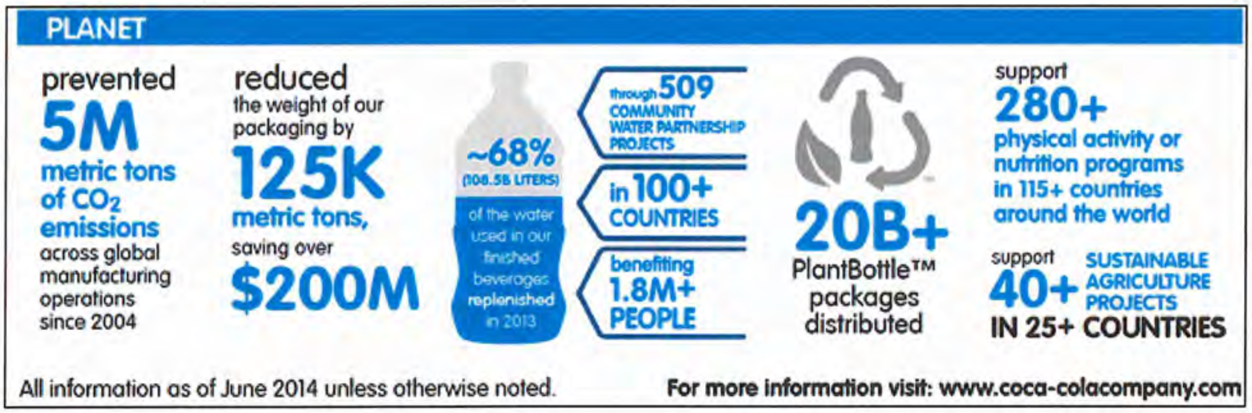
The Recycling Coalition of Utah
Tree Utah

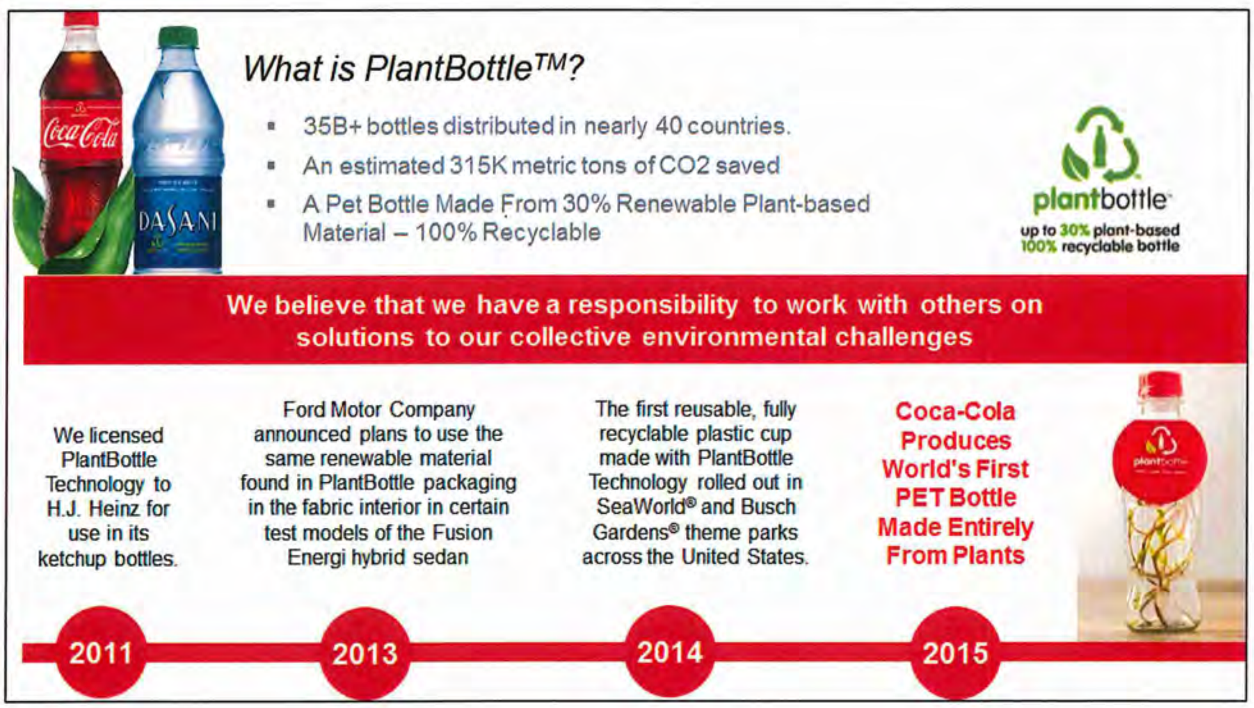
Recognition

2008 State of Utah Meritorious Pollution Prevention Award
2009 State of Utah Pollution Prevention Award for Outstanding Achievement

The Coca-Cola Company

Reduction/Prevention/Support





Because Coca-Cola believes every empty bottle and can is full of potential,
it is our mission to help our campus partners advance their recycling and sustainability efforts.

Recycling Bin Call-to-Action | Consumer Program | Point of Sale Materials

Our 'Give It Back' Call-to-action Encourages Students, Faculty And Staff To Recycle Empty Beverage Containers

Coca-Cola / Keep America Beautiful Bin Grant Program

In 2015, the Coca-Cola/Keep America Beautiful Recycling Bin Grant program provided **3,662 recycling bins to colleges and universities across the country.**

The program makes it easier for students to recycle by placing bins in college residence halls and other convenient locations. In addition to the bins, colleges and universities also receive recycling tips from Keep America Beautiful.

The bins are made possible through a grant from The Coca-Cola Foundation. Grant recipients are chosen based on potential to collect the most cans and bottles, recycling experience, need and other factors. To learn how to apply for a grant for your school or to be added to our notification list for future grants, go to bingrant.org.

THE Coca-Cola FOUNDATION

KEEP AMERICA BEAUTIFUL

Water Stewardship

Sustainable Agriculture

Our Approach

It is important for The Coca-Cola Company to address agricultural challenges and opportunities systemwide and across our entire value chain. Fifty percent of Coca-Cola system's procurement expenditures goes toward agricultural ingredients.

Our Progress

Coca-Cola is on track to achieve it's **2020 goal** to sustainably source our key agricultural ingredients: cane and beet sugar, high fructose corn syrup, tea, coffee, palm oil, soy, oranges, lemons, grapes, apples, mangos, and pulp and paper fiber for packaging.

Highlights

Developed a new seven stage Supplier Engagement Program, which outlines various pathways to achieve compliance with our Sustainable Agriculture Guiding Principle.

Convened 14 workshops in eight regions around the world, with more than 35 of our bottling partners and 200 individuals taking part.

Engaged with more than 20 of our global and regional supplier leaders to drive implementation against 2020 sustainable-sourcing road map.

Protecting Community Land Rights

One issue that we are focusing on is the protection of community land rights. We have committed to zero tolerance for land grabbing and created a plan of action to support our position, which includes conducting third-party social, environmental and human rights assessments in seven critical sugar-sourcing regions and working actively with our suppliers to help prevent any land rights violations.

TECHNICAL SPECIFICATION & PRICING: EQUIPMENT

TECHNICAL SPECIFICATIONS & PRICING: COCA-COLA BOTTLE/CAN PRICING

2016 UNIVERSITY OPERATED LOCATIONS- BOTTLE/CAN PRICING

Package	Unit Pack	Tier 2	Wholesale
Sparkling			
12z 6pk Can	24	$ 14.88	$ 20.00
7.5z 8pk Can	24	$ 11.04	$ 15.00
12z 12pk Core Can	24	$ 14.88	$ 20.00
12z 12pk Flavor Can	24	$ 14.88	$ 20.00
8.5z Aluminum Bottle	24	$ 24.00	$ 35.00
.5L 24pk Bottles	24	$ 16.56	$ 35.00
.5L 6pk Bottles	24	$ 16.56	$ 35.00
12z 8pk Bottles	24	$ 16.32	$ 25.00
1L Bottles	12	$ 17.16	$ 25.00
20z Bottles	24	$ 20.40	$ 40.00
2L Core Bottles	8	$ 16.00	$ 25.00
2L Flavor Bottles	8	$ 16.00	$ 25.00
355ml Glass Imports	24	$ 23.04	$ 28.00
500ml Glass Imports	24	$ 26.88	$ 28.00
8z Glass Bottles	24	$ 24.00	$ 30.00
Water			
Dasani .5L 24pk	24	$ 12.24	$ 16.50
Dasani .5L 6pk	24	$ 12.24	$ 16.50
Dasani 1.5L	12	$ 19.32	$ 25.00
Dasani 12z 8pk	24	$ 11.52	$ 25.00
Dasani 1L	12	$ 18.00	$ 20.00
Dasani 20z	24	$ 20.88	$ 40.00
Dasani Drops 1.9z	6	$ 17.28	$ 25.00
smartwater 1.5L	12	$ 19.80	$ 25.00
smartwater 1L	12	$ 17.28	$ 30.00
smartwater 1L 6pk	12	$ 17.28	$ 30.00
smartwater 20z	24	$ 24.00	$ 45.00
smartwater 700ml	24	$ 26.68	$ 35.00
Zico 11.2z	12	$ 15.96	$ 25.00
Zico 14z	12	$ 20.04	$ 28.00
Zico 1L	12	$ 40.08	$ 50.00

Package	Unit Pack	Tier 2	Wholesale
Enhanced Water			
fruitwater 16.9z	12	$ 13.20	$ 14.00
vitaminwater .5L 6pk	24	$ 24.96	$ 28.00
vitaminwater 20z	24	$ 28.80	$ 40.00
vitaminwater 32z	15	$ 23.55	$ 35.00
Energy			
Full Throttle 16z	24	$ 36.00	$ 60.00
Monster 16z	24	$ 36.00	$ 60.00
Monster 16z 4pk	24	$ 36.00	$ 60.00
Monster 24z	12	$ 25.68	$ 40.00
Monster 8.3z	24	$ 32.00	$ 50.00
Monster Import 550ml	12	$ 25.68	$ 30.00
Monster Java 15z	12	$ 20.00	$ 25.00
Monster Nitrous 12z	12	$ 18.00	$ 25.00
Nos 16z	12	$ 18.00	$ 30.00
Nos 16z	24	$ 36.00	$ 60.00
Nos 22z	12	$ 25.68	$ 40.00
Ubermonster 18.6z	12	$ 25.68	$ 50.00
Powerade			
Powerade 12z 12pk	24	$ 14.64	$ 25.00
Powerade 20z 24pk	24	$ 24.24	$ 40.00
Powerade 20z 8pk	24	$ 24.24	$ 40.00
Powerade 32z	15	$ 16.35	$ 20.00
Powerade Drops 3z	6	$ 17.28	$ 25.00
Powerade Powder 2.5G	8	$ 30.00	$ 48.00
Juice			
Minute Maid 10z	24	$ 18.96	$ 25.00
Minute Maid 450ml	24	$ 29.28	$ 40.00
Tum-E Yummies	12	$ 8.76	$ 15.00
Package	Unit Pack	Tier 2	Wholesale
Tea			
Fuze Tea 12z 12pk	24	$ 14.88	$ 20.00
Fuze Tea 1L	12	$ 17.16	$ 25.00
Fuze Tea 20z	24	$ 20.40	$ 40.00
Fuze Tea 2L	8	$ 16.00	$ 25.00
Gold Peak 18.5	12	$ 15.60	$ 20.00
Honest Tea 16.9z	12	$ 15.60	$ 20.00
Peace Tea 23z	12	$ 11.28	$ 15.00
Mixers			
Mixers 10z	24	$ 18.24	$ 20.00
Mixers 1L	12	$ 17.64	$ 20.00
Milk			
Core Power 11.5z	12	$ 27.00	$ 32.00
Muscle Monster 15z	12	$ 24.00	$ 32.00
Coffee			
illy 11.5z	12	$ 18.96	$ 25.00
Sparkling Water			
Sparkling Water 12z 12pk	24	$ 14.88	$ 20.00

Pricing subject to annual price increase.

REQUEST FOR PROPOSAL NO. 16-39M- RESPONSE- SWIRE COCA-COLA, USA

TECHNICAL SPECIFICATIONS & PRICING: COCA-COLA BOTTLE/CAN PRICING

2016 SODEXO LOCATIONS- CAN/BOTTLE PRICING

	Case Pack		2016 Price
Sparkling			
20 oz PET	24	$	22.32
1L PET	12	$	16.64
2L PET	8	$	12.80
12 oz Cans	24	$	12.24
7.5 oz Mini Cans	24	$	12.00
Water/Sports			
12 oz Dasani	24	$	11.76
20 oz Dasani/Dasani Flavors	24	$	18.96
1L Dasani	12	$	17.28
.5L Dasani	24	$	16.50
1.9 oz Dasani Drops	6	$	17.28
14 oz Zico	12	$	20.04
12 oz Powerade	24	$	15.36
20 oz Powerade	24	$	24.24
3 oz Powerade Drops	6	$	17.28
Glaceau			
20 oz vitaminwater	24	$	28.32
.5L vitaminwater	24	$	24.96
Fruitwater	12	$	12.72
700 ml smartwater	24	$	26.16
20 oz smartwater	24	$	22.56
1L smartwater	12	$	17.16
1.5L smartwater	12	$	19.80
Juice			
10 oz MMJTG	24	$	20.88
450 ml MMJTG	24	$	28.56
Tea			
16 oz Honest Tea	12	$	16.08
18.5 oz Gold Peak	12	$	15.84
Peace Tea	12	$	9.84
Energy			
16 oz Full Throttle/Nos	24	$	39.12
16 oz Monster	24	$	40.80
15 oz Monster Java	12	$	20.96
15 oz Monster Muscle	12	$	24.96
Core Power			
Core Power 11.5 oz	12	$	27.36
illy			
illy 11.5z	12	$	20.04
Pricing subject to annual price adjustment.			

TECHNICAL SPECIFICATIONS & PRICING: FOUNTAIN SYRUP PRICING

2016 ALL LOCATIONS- FOUNTAIN SYRUP PRICING

Products Available From
Coca-Cola Foodservice & On-Premise
Base Chain Price

	5 GAL BIB GAL/CASE	2.5 GAL BIB GAL/CASE	2X1 GAL BIB GAL/CASE
Sparkling & Still	$14.25/71.25	$14.86/37.15	$15.15/30.30
Unsweet Tea	$13.76/68.80	$14.42/36.05	------
Premium Still	$14.84/74.20	$15.46/38.65	------
Frozen Dispensed - Sparkling & Still	$16.15/80.75	$16.58/41.45	$20.16/40.32

Pricing subject annual price adjustment based on the posted Coca-Cola Foodservice & On-Premise price.

2016 ALL LOCATIONS- COCA-COLA CUP/LID/STRAW PRICING

Cup, Lid and Straws	Art #	Wholesale	Unit Price	Count per Case
Adjustment #				
16.5 oz Cups	5253	$100.00	$63.00	1000
24 oz Cup	5458	$120.00	$71.00	1000
32 oz Cup	5142	$100.00	$52.00	480
44 oz Cup	5282	$100.00	$60.00	480
12/24 oz SOLO Lid	5170	$75.00	$50.00	2000
32 oz SOLO Lid	5160	$60.00	$37.00	960
44 oz SOLO Lid	5165	$80.00	$40.00	960
10" Straws WRP CS	5008	$120.00	$67.00	6000
21 oz Compostable Paper Cup	5494	$120.00	$75.00	1000
16/21 Compostable Lid	5496	$70.00	$41.00	2000

CO2 Pricing/Size:
Deposit- 20# Tank- $0.00
CO2 Product- 20# Cost- $0.00

Pricing subject to annual price adjustment.

University of Idaho

REQUEST FOR PROPOSAL NO. 16-39M- RESPONSE- SWIRE COCA-COLA, USA

TECHNICAL SPECIFICATIONS & PRICING: FULL SERVICE VENDING- PRICING AND COMMISSIONS

	Vend	Comm
Package	**Price**	**%***
FS: 12oz Cans Singles	1.00	10.0%
FS: 20 oz NR	1.25	20.0%
FS: Dasani/20oz	1.25	20.0%
FS: Glaceau Smt/20oz Bot	1.50	10.0%
FS: Glaceau Vit/500ml - 6pk	1.50	10.0%
FS: Energy/16 oz FT/Nos	2.50	10.0%
FS: Energy/16 oz Monster	2.50	10.0%
FS: Energy/16oz Monster Java	2.50	10.0%
FS: ISO/20 oz	1.50	10.0%
FS: Juice/.450/MM	1.50	10.0%
FS: Honest Tea/16.9 oz Bot	1.50	10.0%
FS: Gold Peak/18.5 oz Bot	1.50	10.0%

* COMMISSION PERCENT PAID ON CASH COLLECTED

TECHNICAL STRUCTURE AND ECONOMIC VALUE:

FINANCIAL INCENTIVE

Swire Coca-Cola, USA offers the following financial incentive to the University of Idaho in exchange for exclusive pouring and vending services and a 90/10 split (to favor Swire Coca-Cola, USA) in sales of beverages throughout the University and Food Service operations. This financial incentive is based on a Five (5) years initial contract that, if mutually agreed in writing, will be extended by two, five-year increments for a total of ten (10) additional years, provided written notice of each extension is given to the Swire Coca-Cola, USA at least thirty (30) days prior to the expiration date of such term or extension.

One Hundred and Seventy Seven Thousand Dollars ($177,000.00)
Per Term Year of the Contract- paid within 30 days of Term start date and each anniversary thereof.

Full Service Beverage Commissions- Estimated* (based on current annual volume) annual value: $13,100* - commissions paid monthly.

Furthermore, in exchange for this Financial Incentive, Swire Coca-Cola, USA will receive the following:

- 90% of all retail Beverage availability on campus (whether sold by the University or by third-parties, such as Sodexo). The remaining 10% can be supplied through competitive products not distributed by Swire Coca-Cola, USA. Competitive products are limited to 20 ounce bottle products only.
- Fountain Beverages will be exclusive Swire Coca-Cola, USA Products only.
- Swire Coca-Cola, USA will have exclusive Beverage vending rights.
- Swire Coca-Cola, USA will retain control of cooler merchandising and space allocation in all campus retail locations.
- Swire Coca-Cola, USA will have exclusive rights to market and sample Beverage Products in all campus retail locations and on campus grounds.
- Swire Coca-Cola, USA will be the only Beverage supplier to sample and market Beverages on Campus. Alcoholic Beverages and fresh brewed coffee are excluded from this provision.

The Financial Incentive includes all cash compensation the University will receive from Swire Coca-Cola, USA. Additional Considerations are included in the "Additional Consideration" section page 40.

Total Cash Value:

Contract Term 1-5:

Annual Payments Combined:	**$885,000.00**
Estimated* commission Years 1-5:	**$65,500.00***
Total Value with Estimated Commission:	**$950,500.00**

*Paid on cash collected, based on current annual vending volume

ADDITIONAL CONSIDERATIONS:

Swire Coca-Cola, USA will receive recognition as "Official Beverage Sponsor of Vandal Athletics" for all University of Idaho athletic programs.

Swire Coca-Cola, USA will receive and maintain the current level of campus trademark signage as the current Pouring and Vending Service provider.

Swire Coca-Cola, USA will receive parking permits necessary to service the University of Idaho campus; maintain a minimum of current Pouring and Vending Service Provider level of 20.

Swire Coca-Cola, USA will receive eight (8) football, eight (8) basketball and four (4) all other sport transferrable University of Idaho season passes each Term of the Contract to be used at Swire Coca-Cola, USA's discretion.

Third-Party Contractors (e.g. Sodexo) on behalf of the University are bound to sell and market Swire Coca-Cola, USA Products sold to them or the University by Swire Coca-Cola, USA at the price set forth herein.

WARRANTEES:

Swire Coca-Cola, USA warrants that all beverage products will be free from defect and will be packaged and labeled in accordance with all applicable regulations.

Because Swire Coca-Cola, USA does not manufacture the beverage equipment, it cannot make specific representations or warranties about such equipment. However, Swire Coca-Cola, USA will service and maintain the beverage equipment throughout the Term and will replace any defective equipment.

PROPOSER EXCEPTIONS:

6-5 INDEMNIFICATION

Contractor shall indemnify, defend and hold the University and the State of Idaho harmless from and against any and all claims, losses, damages, injuries, liabilities and all costs, including attorneys fees, court costs and expenses and liabilities incurred in or from any such claim, arising from any breach or default in the performance of any obligation on Contractor's part to be performed under the terms of this Agreement, or arising from any act, negligence or the failure to act of Contractor, or any of its agents, subcontractors, employees, invitees or guests. Contractor, upon notice from the University, shall defend the University at Contractor's expense by counsel reasonably satisfactory to the University. ~~Contractor, as a material part of the consideration of the University, hereby waives all claims in respect thereof against the University~~.

Contractor shall: (a) notify the University in writing as soon as practicable after notice of an injury or a claim is received; (b) cooperate completely with the University and/or the University's insurers in the defense of such injury or claim; and (c) take no steps such as admission of liability which would prejudice the defense or otherwise prevent the University from protecting the University's interests.

It is unclear what claims the University is asking Swire Coca-Cola, USA to waive.

7-2 INDEMNIFICATION

Contractor shall indemnify, defend and hold the University and the State of Idaho harmless from and against any and all claims, losses, damages, injuries, liabilities and all costs, including attorneys fees, court costs and expenses and liabilities incurred in or from any such claim, arising from any breach or default in the performance of any obligation on Contractor's part to be performed under the terms of this Agreement, or arising from any act, negligence or the failure to act of Contractor, or any of its agents, subcontractors, employees, invitees or guests. Contractor, upon notice from the University, shall defend the University at Contractor's expense by counsel reasonably satisfactory to the University. ~~Contractor, as a material part of the consideration of the University, hereby waives all claims in respect thereof against the University.~~

Contractor shall: (a) notify the University in writing as soon as practicable after notice of an injury or a claim is received; (b) cooperate completely with the University and/or the University's insurers in the defense of such injury or claim; and (c) take no steps such as admission of liability which would prejudice the defense or otherwise prevent the University from protecting the University's interests.

It is unclear what claims the University is asking Swire Coca-Cola, USA to waive.

6-20 RISK OF LOSS

Until ~~all~~ improvements, equipment, or goods to be provided under this Agreement are installed on property owned or controlled by University and working properly, Contractor shall bear ~~all~~ risks of ~~all~~ loss or damage to the improvements, equipment, or goods, excluding loss or damage caused by acts, omissions, or negligence of the University. Once ~~all~~ improvements, equipment, or goods to be provided under this Agreement are installed on property owned or controlled by University and working properly, the risk of ~~all~~ loss or damage shall be borne by University, excluding loss or damage caused by acts, omissions, or negligence of the Contractor.

7-1 RISK OF LOSS

Until ~~all~~ improvements, equipment, or goods to be provided under this Agreement are installed on property owned or controlled by University and working properly, Contractor and its subcontractors of any tier shall bear all risks of ~~all~~ loss or damage to the improvements, equipment, or goods, excluding loss or damage caused by acts, omissions, or negligence of the University. Once ~~all~~ improvements, equipment, or goods to be provided under this Agreement are installed on property owned or controlled by University and working properly, the risk of ~~all~~ loss or damage shall be borne by University, excluding loss or damage caused by acts, omissions, or negligence of the Contractor. Contractors shall require its subcontractors of any tier to bear the same risk of loss and.

The University will assume liability for each individual piece of equipment and each individual deliver of product when each is delivered/installed. The transfer of liability will not wait until "all" equipment and "all" product is delivered/installed.

Beverages may include, without limitation, carbonated and non-carbonated artificially flavored drinks, packaged waters, fruit and/or vegetable juices, fruit and/or juice containing drinks, tea products, and drink and beverage bases in the form of syrups, whether powders, crystals, concentrates or otherwise, from which such drinks and beverages can be prepared.

"Beverages" means all non-alcoholic beverages (i.e. anything consumed by drinking), whether or not such beverages (i) contain nutritive, food, or dairy ingredients, OR (ii) are in a frozen form. This definition applies without regard to the beverage's labeling or marketing. Powders, syrups, grounds (such as for coffee), herbs (such as for tea), concentrates, and all other beverage bases from which Beverages can be made are deemed to be included in this definition. For the avoidance of doubt, "flavor enhancers", "liquid water enhancers", and non-alcoholic beverages sold as "shots" or "supplements" are considered Beverages.

"Permitted Exceptions" means Company Beverages will be the only Beverages sold, served, distributed, sampled, or otherwise made available on Campus, provided however University may, on a non-exclusive basis, serve, sell, or dispense the following Competitive Products ("Permitted Exceptions") on Campus:

- Fresh milk or fresh flavored milk,
- Hot tea and hot coffee freshly brewed on premise,
- Beer (alcoholic, low-alcoholic and non-alcoholic), wine, liquor
- Hot chocolate,
- Bottled office water (i.e. bulk water 5 gallons and above),
- Any student, faculty or administrative staff or guest person who brings beverages on campus for their own personal consumption.

INSURANCE: CERTIFICATE OF INSURANCE

ACORD®

CERTIFICATE OF LIABILITY INSURANCE

DATE(MM/DD/YYYY) 01/21/2016

THIS CERTIFICATE IS ISSUED AS A MATTER OF INFORMATION ONLY AND CONFERS NO RIGHTS UPON THE CERTIFICATE HOLDER. THIS CERTIFICATE DOES NOT AFFIRMATIVELY OR NEGATIVELY AMEND, EXTEND OR ALTER THE COVERAGE AFFORDED BY THE POLICIES BELOW. THIS CERTIFICATE OF INSURANCE DOES NOT CONSTITUTE A CONTRACT BETWEEN THE ISSUING INSURER(S), AUTHORIZED REPRESENTATIVE OR PRODUCER, AND THE CERTIFICATE HOLDER.

IMPORTANT: If the certificate holder is an ADDITIONAL INSURED, the policy(ies) must be endorsed. If SUBROGATION IS WAIVED, subject to the terms and conditions of the policy, certain policies may require an endorsement. A statement on this certificate does not confer rights to the certificate holder in lieu of such endorsement(s).

PRODUCER
Aon Risk Insurance Services West, Inc.
Denver CO Office
1900 16th Street, Suite 1000
Denver CO 80202 USA

CONTACT NAME:
PHONE (A/C. No. Ext): (303) 758-7688 FAX (A/C. No.): (303) 758-9458
E-MAIL ADDRESS:

INSURED
Swire Pacific Holdings Inc.
dba/ Swire Coca-Cola
12634 South 265 West
Draper UT 84020 USA

INSURER(S) AFFORDING COVERAGE		NAIC #
INSURER A:	The Travelers Indemnity Co.	25658
INSURER B:	Travelers Property Cas Co of America	25674
INSURER C:	United States Fidelity & Guaranty Co.	25887
INSURER D:		
INSURER E:		
INSURER F:		

COVERAGES **CERTIFICATE NUMBER:** 570061025676 **REVISION NUMBER:**

THIS IS TO CERTIFY THAT THE POLICIES OF INSURANCE LISTED BELOW HAVE BEEN ISSUED TO THE INSURED NAMED ABOVE FOR THE POLICY PERIOD INDICATED. NOTWITHSTANDING ANY REQUIREMENT, TERM OR CONDITION OF ANY CONTRACT OR OTHER DOCUMENT WITH RESPECT TO WHICH THIS CERTIFICATE MAY BE ISSUED OR MAY PERTAIN, THE INSURANCE AFFORDED BY THE POLICIES DESCRIBED HEREIN IS SUBJECT TO ALL THE TERMS, EXCLUSIONS AND CONDITIONS OF SUCH POLICIES. LIMITS SHOWN MAY HAVE BEEN REDUCED BY PAID CLAIMS. Limits shown are as requested

INSR LTR	TYPE OF INSURANCE	ADDL INSD	SUBR WVD	POLICY NUMBER	POLICY EFF (MM/DD/YYYY)	POLICY EXP (MM/DD/YYYY)	LIMITS	
B	X COMMERCIAL GENERAL LIABILITY			HJGLSA9C589811TIL15	03/31/2015	03/31/2016	EACH OCCURRENCE	$1,000,000
	CLAIMS-MADE X OCCUR			SIR applies per policy terms & conditions			DAMAGE TO RENTED PREMISES (Ea occurrence)	$300,000
							MED EXP (Any one person)	$5,000
							PERSONAL & ADV INJURY	$1,000,000
	GEN'L AGGREGATE LIMIT APPLIES PER:						GENERAL AGGREGATE	$2,000,000
	X POLICY PRO-JECT LOC						PRODUCTS - COMP/OP AGG	$2,000,000
	OTHER:						SIR	$5,000
A	AUTOMOBILE LIABILITY			HC2E-CAP-9C589835-TCT-15	03/31/2015	03/31/2016	COMBINED SINGLE LIMIT (Ea accident)	$2,000,000
	X ANY AUTO			SIR applies per policy terms & conditions			BODILY INJURY (Per person)	
	ALL OWNED AUTOS / SCHEDULED AUTOS						BODILY INJURY (Per accident)	
	HIRED AUTOS / NON-OWNED AUTOS						PROPERTY DAMAGE (Per accident)	
B	X UMBRELLA LIAB X OCCUR			ZUP12T4179515NF	03/31/2015	03/31/2016	EACH OCCURRENCE	$5,000,000
	EXCESS LIAB CLAIMS-MADE			Umbrella			AGGREGATE	$5,000,000
	DED X RETENTION			SIR applies per policy terms & conditions				
C	WORKERS COMPENSATION AND EMPLOYERS' LIABILITY	Y/N		HC2SUB9C58973115	03/31/2015	03/31/2016	X PER STATUTE OTH-ER	
	ANY PROPRIETOR / PARTNER / EXECUTIVE OFFICER/MEMBER EXCLUDED? (Mandatory in NH)	N	N/A	All other states			E.L. EACH ACCIDENT	$1,000,000
	If yes, describe under DESCRIPTION OF OPERATIONS below			SIR applies per policy terms & conditions			E.L. DISEASE-EA EMPLOYEE	$1,000,000
							E.L. DISEASE-POLICY LIMIT	$1,000,000
B	Products Liab			HIDSS9C589825TIL15	03/31/2015	03/31/2016	Aggregate	$2,000,000
				SIR applies per policy terms & conditions			Each Occurrence	$1,000,000
							Occurrence SIR	$10,000

DESCRIPTION OF OPERATIONS / LOCATIONS / VEHICLES (ACORD 101, Additional Remarks Schedule, may be attached if more space is required)
Attn: Contract for Services.
Regents of the University of Idaho, a public corporation, state educational institution, and a body politic and corporate organized and existing under the Constitution and laws of the State of Idaho are included as Additional Insured in accordance with the policy provisions of the General Liability policy. Notice of Cancellation 30 Days.

CERTIFICATE HOLDER

State of Idaho and Regents of the
University of Idaho
Attn: Risk Management
P.O. Box 443162
Moscow ID 83844-3162 USA

CANCELLATION

SHOULD ANY OF THE ABOVE DESCRIBED POLICIES BE CANCELLED BEFORE THE EXPIRATION DATE THEREOF, NOTICE WILL BE DELIVERED IN ACCORDANCE WITH THE POLICY PROVISIONS.

AUTHORIZED REPRESENTATIVE

Aon Risk Insurance Services West, Inc.

Holder Identifier :

Certificate No : 570061025676

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ACORD 25 (2014/01)

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SUBJECT

Programs and Changes Approved by Executive Director - Quarterly Report

REFERENCE

April 2016	Board received quarterly report.

APPLICABLE STATUTE, RULE, OR POLICY

Idaho State Board of Education Governing Policies and Procedures, Section III.G.8.a., Postsecondary Program Approval and Discontinuance

BACKGROUND/DISCUSSION

In accordance with Board Policy III.G.3.c.i. and 4.b, prior to implementation the Executive Director may approve any new, modification, and/or discontinuation of academic or career-technical education programs, with a financial impact of less than $250,000 per fiscal year. Each institution has indicated that their respective program changes, provided in Attachment 1, fall within the threshold for approval by the Executive Director.

Consistent with Board Policy III.G.8.a., the Board office is providing a quarterly report of program changes from Idaho's public institutions that were approved between April 2016 and July 2016 by the Executive Director.

ATTACHMENTS

BOARD ACTION

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

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Academic Programs

Approved by Executive Director
April 2016 and July 2016

Institution	Program Changes
BSU	Discontinue Addiction Studies, Graduate Certificate
BSU	Discontinue Consulting Teacher Endorsement: Behavioral Specialist, Graduate Certificate
BSU	Discontinue Family Studies, Graduate Certificate
BSU	Establish the Blue Sky Institute
CWI	New Perioperative Nursing, Academic Certificate
ISU	Establish the Integrated Research Center
LCSC	Replace existing BA/BS in Social Sciences, History emphasis with a BA/BS in History
LCSC	New BS in Radiographic Science

Institution	**Other Program Changes** (Does not require approval but requires notification to OSBE per policy III.G.)
BSU	Consolidated and change the name of existing M.S. and Master of Engineering, in Computer Engineering and in Electrical Engineering to Computer and Electrical Engineering – result of program prioritization
BSU	Change name of Department of Psychology to Department of Psychological Sciences
BSU	Change name of existing Institute for the Study of Addiction to the Institute for the Study of Behavioral Health and Addiction
CSI	Move Computer Science from Mathematics, Engineering, and Computer Science department to the Biology Department to include changing name of department to Biology and Computer Science
ISU	Change name of existing Family Practice Residency program to Family Medicine Residency Program
UI	Name changes: • Option in Math, BS – from Applied-Scientific Modeling to Applied Quantitative Modeling • From Forest Resources B.S.For.Res to Forestry, B.S.(a separate request submitted to update program and degree in Board Policy III.Z statewide program responsibility list) • Conservation Social Sciences minor to Natural Resources and Conservation • Emphasis in Music Education, B.Mus – from Instrumental-Vocal to Vocal Emphasis Administrative Reorganization: • Rename Martin School to the Martin School of Global Studies and merge Departments of Philosophy and Political Science into one department • Minor in Outdoor Recreation Leadership and Minor in Sustainable Tourism and Leisure Enterprises will solely be administered by the College of Education, Department of Movement Sciences Discontinue Program Components: • Minor – American Government/Public Law

Institution	**Other Program Changes** (Does not require approval but requires notification to OSBE per policy III.G.)
	• Minor – Climate Change • Minor – Coaching • Graduate Certificate – Environmental Contamination Assessment • Graduate Certificate – Environmental Water Science • Undergraduate Certificate – Fire, Ecology and Management • Undergraduate Certificate – Global Justice • Minor – International Political Economy • Undergraduate Certificate – Professional Ethics • Minor – Public administration and policy • Undergraduate certificate – Reproductive Biology • Minor – Sports Science • Emphasis, Music Education, B.Mus. – Instrumental-vocal • Emphasis, Music Education, B.Mus. – Vocal-keyboard Department and Program Components: Create a new Department of Biological Engineering in the College of Engineering which will house existing B.S., M.Engr., M.S., and Ph.D. degree programs in Biological Engineering – this is a secondary action as a result of program prioritization. New program components: • Undergraduate certificate, Remote Sensing • Undergraduate certificate, Climate Change • Minor in Ecology • Emphasis in English, B.A., Linguistics and Literacy • Option in Environmental Science, B.S. – The addition of this option allows students to create greater than 50% of the curriculum from a distance but not 100%. • Undergraduate certificate, Restoration Ecology • Undergraduate certificate, Tribal Natural Resources Stewardship • 3 Emphases, Music, B.Mus.: Arts Administration, Entrepreneurship, General Business • Minor in Vocal-Instrumental Music Education • Discontinue undergraduate certificate, Fire Ecology, Management, and Technology and create the graduate certificate under the same title Existing programs delivered/available via distance delivery: • Ed.S. in Curriculum and Instruction • General Studies, B.G.S. • History, B.A. and B.S. • Organizational Sciences, B.A. and B.S. • Psychology, B.A. and B.S.

Professional - Technical Education Programs

Approved by Executive Director

Institution	Program Changes
CSI	Consolidate Wind Energy and Environmental Technology programs into a new AAS, Renewable Energy Systems Technology program • Addition of an Intermediate Technical Certificate, Industrial Systems Management Technology to this new program
CSI	New Certified Nursing Assistant program, Basic Technical Certificate

Institution	Program Changes
CSI	New Geospatial Technology Program, Basic Technical Certificate
EITC	Addition of Light Duty Diesel, Advanced Technical Certificate and AAS to existing Diesel Technology program
LCSC	New Pharmacy Technology Program, Intermediate Technical Certificate
NIC	Addition of Mechatronics, Advanced Technical Certificate and AAS to the existing Industrial Mechanics/Millwright program
NIC	New Entrepreneurship, Basic Technical Certificate to Business Leadership program
NIC	Discontinue Quality Postsecondary Technical Certificate from the Business Leadership program
NIC	Addition of Advanced Technical Certificate to existing Web Design program

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SUBJECT

Higher Education Research Council Appointment

REFERENCE

December 2011	Board appointed Peter Midgley to the Higher Education Research Council for a three (3) year term.
May 2012	Board appointed Dr. David Hill to the Higher Education Research Council as the INL representative
April 2013	Board appointed Bill Canon to the Higher Education Research Council for a three (3) year term.
August 2014	Board appointed Dr. Kelly Beierschmitt to the Higher Education Research Council as the INL representative, replacing Dr. Hill.
October 2014	Board appointed Dr. Robin Woods and re-appointed Dr. Haven Baker to the Higher Education Research Council for a three (3) year term.

APPLICABLE STATUTE, RULE, OR POLICY

Idaho State Board of Education Governing Policies and Procedures, Section III.W., Higher Education Research

BACKGROUND/DISCUSSION

The Higher Education Research Council (HERC) is responsible for implementing the Board's research policy (Board Policy III.W.) and provides guidance to Idaho's four-year public institutions for a statewide collaborative effort to accomplish goals and objectives set forth in Board policy. HERC also provides direction for and oversees the use of research funding provided by the Legislature to promote research activities that will have a beneficial effect on the quality of education and the economy of the State.

HERC consists of the Vice Presidents of Research from Boise State University, Idaho State University, and the University of Idaho and a representative of Lewis-Clark State College; a representative of the Idaho National Laboratory (INL); and three (3) non-institutional representatives, with consideration of geographic, private industry involvement and other representation characteristics.

There is currently one HERC member up for re-appointment. This member serves as one of the industry partner representatives.

Mr. Bill Canon is the Director of Strategic Business Development at Valmark Interface Solutions (VIS) out of Livermore, California; he resides in Meridian, Idaho. Mr. Canon has been a very active and valuable member during his time on HERC. This would be Mr. Canon's second term on the Council.

ATTACHMENTS

Attachment 1 – Current HERC Membership Page 3

STAFF COMMENTS AND RECOMMENDATIONS

Staff recommends approval.

BOARD ACTION

I move to re-appoint Mr. Bill Canon to the Higher Education Research Council for three (3) year terms effective immediately and expiring June 30, 2019.

Moved by__________ Seconded by___________ Carried Yes_____ No_____

HIGHER EDUCATION RESEARCH COUNCIL

MARCH 2016

Dr. John K. "Jack" McIver
Vice President for Research & Economic Development
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Dr. Mark Rudin (Chair)
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Mr. Bill Canon **(04/13-06/16)**
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Ms. Robin Woods **(10/14-06/17)**
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LEWIS-CLARK STATE COLLEGE

SUBJECT
Lewis-Clark State College's Faculty Constitution

REFERENCE
August 2014	The Board approved changes to the Faculty Constitution addressing committee structure changes.

APPLICABLE STATUTE, RULE, OR POLICY
Idaho State Board of Education Governing Policies & Procedures, Section 1 Subsection S. Institutional Governance.
Lewis-Clark State College Policy 1.104 Constitution.

BACKGROUND/DISCUSSION
The Faculty of Lewis-Clark State College (LCSC) voted to remove from the Constitution, reference to specific committees, meeting schedules or Faculty Senate representation. The sections on General Provisions, Responsibilities of Faculty and Amendment of the Constitution are unchanged, and remain as last approved by the Board. References to committees, composition of the Senate and meeting schedules have been moved to a new LCSC Policy 1.104: Operational Guidelines for Faculty Governance, which by policy, does not require Board approval.

IMPACT
Removing such prescriptive and detailed information from the LCSC Faculty Constitution allows Faculty Senate flexibility in conducting its business, without the need to seek Board approval for minor changes.

ATTACHMENTS
Attachment 1 – Policy 1.104: Constitution Page 3

STAFF COMMENTS AND RECOMMENDATIONS
The proposed changes are compliant with Board policy. Staff recommends approval.

BOARD ACTION
I move to approve the proposed changes to the Lewis-Clark State College Faculty Constitution as set forth in the materials submitted to the Board in Attachment 1.

Moved by __________ Seconded by __________ Carried Yes _____ No _____

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Lewis-Clark State College | Policy # 1.104 | Page 1 of 14
Policy and Procedures Manual | Date: 8/1/79 | Rev: 7/2014

SECTION: I. GENERAL

SUBJECT: CONSTITUTION OF THE FACULTY OF LEWIS-CLARK STATE COLLEGE

Background: Used by faculty to discharge responsibility for internal government.

Point of Contact: The President, the Provost, and the Faculty Senate are responsible for monitoring this policy.

Other LCSC offices directly involved with implementation of this policy, or significantly affected by the policy: Faculty Association

Date of approval by LCSC authority: 7/2014

Date of State Board Approval: 8/2014

Date of Most Recent Review: 03/2016

Summary of Major Changes incorporated in this revision to the policy: ~~Committee structure, Faculty Senate Apportionment, and clarification of parliamentary procedures.~~ Sections of the constitution that are more appropriate as operational guidelines have been removed. Removed sections will be placed in a separate document (operational guidelines) that will require LCSC approval for future changes but not State Board Approval.

PREAMBLE

We, the Faculty of Lewis-Clark State College, in order to discharge our responsibilities for internal government entrusted to us by the Idaho State Board of Education (hereafter referred to as Idaho SBOE), do hereby adopt and declare this constitution to be the basic document under which we shall discharge those responsibilities, consonant with the established policies of the Idaho SBOE. Any provision of this constitution that falls below the minimum standards set by the Idaho SBOE policy is inapplicable.

ARTICLE I—GENERAL PROVISIONS

Section 1. Idaho State Board of Education. The Idaho SBOE is vested by Article IX of the Constitution of the State of Idaho with all powers necessary or convenient to govern the College in all its aspects. The Idaho SBOE is the final authority for actions of the Faculty. Policy actions taken by the Faculty are subject to the final approval of the Idaho SBOE.

Section 2. President of the College. The President shall be president of the Faculty, or of the several faculties, within her or his institution and the chief executive of the instructional force in all of the institution's departments or divisions. She or he shall have authority, subject to Idaho SBOE policies, to give general direction to the instruction, research, and services of the institution. She or he shall make all recommendations concerning employment of faculties and other personnel of the institution. She or he shall be responsible to the Idaho SBOE for the administration and enforcement of all rules and regulations of the institution promulgated within the policies adopted by the Idaho SBOE:

A. The President, with the advice of the Faculty, shall determine from time to time the internal and functional organization of the institution. She or he, or her or his designee, shall be an ex officio member of all committees, councils, and boards necessary to the operation of the institutional program and the immediate government of the institution.

B. The President, with the advice of the Faculty, shall have the right to veto any action, resolution, or recommendation of the Faculty, provided, however, that any issue so vetoed upon a two-thirds (2/3) vote of the Faculty present and voting at a regular meeting of the Faculty Association must be referred to the Idaho SBOE for consideration.

C. The President shall have all the rights, prerogatives, and responsibilities, which normally accrue to the position. She or he shall be responsible to the Idaho SBOE.

D. The chief executive shall select her or his own staff, subject to the required approval of the Idaho SBOE for all appointments.

Section 3. The Faculty of the College. The Faculty of the College consists of full-time lecturers, instructors, assistant professors, associate professors, professors, exempt and instructional personnel teaching at least six (6) credits or twelve (12) contact hours per week for three (3) or more of the previous six (6) semesters, the President, Provost, Vice Presidents, Deans, instructional Division Heads, and Registrar.

Section 4. Associate Faculty Members. Faculty members with emeritus status, exempt instructional personnel teaching at least one (1) credit per year but not listed as Faculty in Section 3, and such other administrative officers as the President may designate in writing are Associate Faculty members.

Section 5. The Faculty Association. The Faculty Association of Lewis-Clark State College is hereby established as the body representing the electoral interest of the Faculty. The Faculty of the College are voting members of the Faculty Association; Associate Faculty members are members of the Faculty Association with voice, but without vote.

The Faculty Association, acting in partnership with the President, is responsible for establishing educational policies and participating in institutional government (as defined in Article III of this document). The Faculty Association communicates with the Idaho SBOE through the President, the Provost, and the Chair of the Faculty Association. The responsibilities of the Faculty Association are carried out through the various committees of the Faculty Association, the Faculty Senate, and the assembled Faculty Association.

Section 6. The Faculty Senate. The Faculty Senate is empowered to act for the Faculty in all matters pertaining to the immediate governance and improvement of the College. The Faculty Senate is responsible to and reports to the Faculty Association and through the President to the Idaho SBOE, per LCSC's organizational structure. It will establish and review policies pertaining to faculty such as those for promotion and merit, ~~as well as~~ sabbatical and professional leaves, ~~make~~ and curriculum decisions.~~,~~ ~~and~~ It will also serve to protect the well-being of the students.

~~A. Structure. The Faculty Senate shall be constituted as follows:~~

~~1. Each Division of the college engaged in instruction shall elect two (2) Senators to the Senate excepting the Library that shall elect one (1). Each Senator for a Division shall be a regular member of the Faculty Association with his or her primary appointment in that Division.~~

~~Divisions are defined as the Library and those instructional units that are chaired by a Division Chair. Student Affairs shall have one (1) Senator.~~

~~2. Two (2) students are appointed by the President of the Associated Students of Lewis-Clark State College (ASLCSC). They will be ex-officio members with voice but without vote.~~

~~3. The President, or the President's designated representative, Registrar, the Chair of the Curriculum Committee, and Past Faculty Chair shall be ex-officio members with voice, but without vote in the Faculty Senate.~~

~~B. Officers. Each year by the end of spring semester, the Faculty Association shall elect a Chair and a Chair-Elect from the Faculty to take office the day following spring graduation. The Chair and the Chair-Elect are also Chair and Chair-Elect of the Faculty Senate. Also, each year a Secretary from the Faculty shall be appointed by the Chair, subject to confirmation by the Faculty Association.~~

~~1. Responsibilities of the Chair are to:~~

~~a. be the official leader and voice of the Faculty Association;~~

~~b. represent the Faculty Association at the Idaho SBOE meetings dealing with higher education;~~

~~c. preside at Faculty Association meetings which she or he calls;~~

~~d. preside at or appoint the Chair-elect to preside at all meetings of the Faculty Senate;~~

~~e. be an ex-officio member of all committees with voice, but without vote;~~

~~f. appoint the Secretary of the Faculty Association, subject to confirmation by the Faculty Association;~~

~~g. call regular meetings of the Faculty Senate during the academic year;~~

~~h. ensure a quorum of 50% plus one (1) Faculty Senate members are present prior to conducting official business;~~

~~i. perform all other duties pertaining to this office, as they arise;~~

~~j. act as a Chair of the Chairs for the standing committees of the Senate;~~

~~k. chair the Faculty Senate Cabinet and the Budget, Planning, and Assessment Committee;~~

~~l. be a member of the Idaho Council of Higher Education Faculty.~~

~~2. Compensation to the Chair:~~

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~~a. The Chair shall receive a stipend equal to one (1) month's salary, which is to be paid over the term of the Chair's regular contract payment.~~

~~b. The Chair shall receive a 50% release time from normal teaching duties during his or her term.~~

~~(1) Upon the mutual agreement of the Chair, Provost, Chair's Division Chair, Chair-elect, and Chair-elect's Division Chair, the Chair and Chair-elect may elect to receive release from normal teaching duties in a combination that will provide for a smooth transition from year to year. For example: Fall Semester, Chair 50%; Spring Semester, Chair 25% and Chair-elect 25%, or some other combination as agreed upon by all of the above parties.~~

~~c. The Provost's Office shall provide budget support for travel to Idaho SBOE meetings, Idaho Council of Higher Education meetings, and other engagements mandated by the regular responsibilities of the Chair.~~

~~3. Responsibilities of the Chair-Elect are to:~~

~~a. assume the duties and responsibilities of the Chair in the absence of the Chair;~~

~~b. perform all other duties pertaining to this office, and other such duties as may be assigned by the Chair or by the Faculty Association;~~

~~c. chair the Faculty Affairs Committee;~~

~~d. serve on the College Foundation Board Committee;~~

~~e. be a member of the Budget, Planning, and Assessment Committee;~~

~~f. be a member of the Faculty Senate Cabinet;~~

~~4. Responsibilities of the Past Chair are to:~~

~~a. chair the Student Affairs Committee;~~

~~b. be a member of the Budget , Planning, and Assessment Committee;~~

~~c. be a member of the Faculty Senate cabinet;~~

~~d. be an ex-officio member of the Faculty Senate.~~

~~5. Responsibilities of the Secretary/Treasurer are to:~~

~~a. maintain an accurate record of all meetings of the Faculty Association and the Faculty Senate;~~

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~~b. send a copy of the Faculty Association meeting and the Faculty Senate meeting minutes to the Provost, Faculty and Archivist;~~

~~c. maintain records of and report on Faculty dues payments and expenditures made from those funds.~~

~~C. Term of Office.~~

~~1. Faculty Senators. Faculty Senators are encouraged to serve for three (3) years.~~

~~2. Faculty Chair. The Chair will serve one (1) year as the Chair, and one (1) year as the immediate Past Chair. In the event of a resignation by the Chair, the immediate Past Chair will assume the responsibilities of the Chair for the remainder of the term.~~

~~3. Chair Elect. The Chair-Elect will serve one (1) year as Chair-Elect and the following year will serve as the Chair. In the event of a resignation by the Chair-Elect, an Association meeting will be held within a month of the resignation for the purpose of electing a new Chair-Elect.~~

~~4. With mutual agreement between the Faculty Chair and the Chair-Elect, and upon election by the Faculty Association, the Faculty Chair and Chair-Elect may serve an additional one (1) year term.~~

~~5. Secretary/Treasurer. The Secretary/Treasurer will serve a term of one (1) year. This term may be repeated.~~

~~**Section 7. Parliamentary Procedure.** All official business conducted by the Faculty Association, the Faculty Senate, and all Standing Committees shall follow the current edition of Robert's Rules of Order.~~

~~**ARTICLE II FACULTY ASSOCIATION MEETINGS**~~

~~**Section 1. Meetings.** Meetings of the Faculty Association may be called with five (5) school days notice by the President or by the Chair of the Faculty Association, or in the absence of the Chair, by the Chair-Elect of the Faculty Association, or upon the written petition of ten (10) Faculty members. There will be at least four (4) meetings during the college year. The President and the Chair, respectively, are expected to call at least two (2) meetings each. The President, (or her or his designee), shall preside at all meetings of the Faculty Association which the President has called, and the Chair or Chair-Elect shall preside at all meetings they have called.~~

~~**Section 2. Secretary-Treasurer**. The Secretary-Treasurer of the Faculty Association shall be the Secretary-Treasurer of the Faculty Senate subject to confirmation by the Faculty Association.~~

~~**Section 3. Quorum.** A quorum shall consist of not less than one fifth (1/5) of the members of the Faculty Association (as defined in Article 1, Section 5.) Proxy votes must be presented in writing to the Secretary of the Faculty. Proxy votes will not count in the calculation of a quorum. By majority vote of the members present, a written poll of the Faculty of the College may replace a voice or written vote. The written poll must be issued within two (2) working days of the request and returned within seven (7) working days of the request.~~

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~~**Section 4. Agenda.** An agenda listing all subjects to be voted on by the Faculty Association, other than routine matters, shall be issued to all members of the Faculty at least two (2) days in advance of each meeting of the Faculty Association, except as provided in clause E of this section.~~

~~A. Responsibility. The President shall be responsible for and shall issue the agenda when she or he has called the meeting. The Faculty Association Chair (or Chair-Elect in the absence of the Chair) shall be responsible for and issue the agenda when the Chair (or Chair-Elect) has called the meeting.~~

~~B. Agenda Items. Individual members of the College community who wish to suggest items for the agenda shall submit them to the President if the President has called the meeting, or to the Chair (or Chair-Elect) if the Chair (or Chair-Elect) has called the meeting. No items may be considered under this clause, unless presented within the proper time limit (see Article II, Section 4 for Agenda and Article II, Section 4, E. Agenda for Emergency Meetings), or unless the presiding officer considers the matter at hand "routine" business.~~

~~C. Resolutions Requiring Action. Ten (10) or more members of the College community desiring to submit a resolution which requires action at the next Faculty Association meeting shall submit the signed resolution to the President at least three (3) school days prior to the meeting. Such resolutions shall be published in full and included with the agenda.~~

~~D. Proposed Changes of Written Policies or Regulations. Any proposed change in written policy or regulation which requires action at the next Faculty Association meeting must be published in full with the agenda, or final action on the proposal must be delayed until the next Faculty Association meeting.~~

~~E. Agenda for Emergency Meetings. If circumstances require an emergency meeting of the total Faculty, the President or the Faculty Association Chair shall declare the emergency, and thus call the meeting. In such circumstances, the agenda may be limited to items approved by the President, if the President calls the meeting, or by the Chair if the Chair calls the meeting, and should be published not less than two (2) school days prior to the emergency meeting. Policy actions taken at emergency meetings require an approving vote of two-thirds (2/3) of the members of the total Faculty in attendance at the emergency meeting. A quorum, as indicated in Article II, Section 3, must be present to conduct any business. None of the rules stipulated in this clause may be suspended or altered.~~

ARTICLE II~~I~~—RESPONSIBILITIES OF THE FACULTY

Subject to the authority of the Idaho SBOE and in keeping with the role and mission of the College, the Faculty recognizes and accepts its responsibilities for the immediate governance of the College, including, but not restricted to:

Section 1. Standards for Admission. The Faculty, in concert with the Director of Admissions/Registrar, shall establish minimum standards for admission to the College and its various units.

Section 2. Academic Standards. The Faculty shall establish academic standards to be maintained by all students in the College and its various units.

Section 3. Courses, Curricula, Graduation Requirements, Degrees. The Faculty shall establish and approve courses of instruction, curricula, degrees offered, and graduation requirements.

Section 4. Scholarships, Honors, Awards, Financial Aid. The Faculty shall establish general principles in accordance with which privileges such as scholarships, honors, awards, and financial aid shall be accepted and allocated.

The Faculty may review the standards established for the allocation of such privileges.

Section 5. Conduct of Students. The Faculty is responsible for establishing rules and regulations governing the conduct of students on the campus and at authorized College activities. Rules and regulations established by the committees shall conform to established law and standards of due process, and shall be subject to review by the Faculty Senate and the President, as well as review and final approval by the Idaho SBOE. Students shall have the right of formal appeal from decisions of the College officials and bodies to the Hearing Board, the President, and the Idaho SBOE.

Section 6. Student Participation. The students shall be given representation on Faculty committees and in the Faculty Senate.

Section 7. Selection of Administrative Officers. The Faculty shall assist the Idaho SBOE in the selection of the President and shall assist the President in the selection of other administrative officers of the College.

Section 8. Governance of Divisions. The Faculty shall establish general standards to guarantee the rights of the Faculty to participate in the governance of their respective divisions and in the selection of their respective Division Chairs.

Section 9. Faculty Welfare. The Faculty, through the Faculty Senate and other standing Faculty committees, shall select a standing committee to establish criteria for salaries, working conditions, benefits, appointments, promotion, tenure, dismissal, academic freedom, leaves, and related matters, insofar as they are not in conflict with Idaho SBOE policy, and shall, in concert with the Provost, provide for a program of Faculty development.

Section 10. Budget. Members of the Faculty shall participate in budgetary matters at the Divisional and College level. It is expected that the President will seek advice and counsel from the Faculty on budgetary policies.

Section 11. Organization of the College. The Faculty shall advise and assist the President and the Idaho SBOE in establishing, reorganizing, or discontinuing administrative and academic units of the College.

Section 12. Committee Structure. The Faculty shall establish and maintain all college-wide standing and special committees, subcommittees, councils, and boards as specified in Article IV, and similar bodies necessary to the internal governance of the College, and provide for the appointment or election of members of such bodies. The section does not apply to ad hoc committees of a fact-finding nature to advise the President or to committees established by the President, or designee, for delegated administrative tasks.

~~ARTICLE IV – COMMITTEES~~

~~Section 1. General Provisions.~~

~~A. The word "committees" is a general term describing all committees, sub-committees, councils, boards, and similar bodies.~~

~~B. The Faculty Senate appoints all standing committees other than those reserved to the President or designee.~~

~~C. The President is responsible for appointing ad hoc committees of a fact-finding nature to advise her or him and to appoint committees made up solely of administrators; the President, or designee, may also appoint committees for delegation of administrative tasks.~~

~~D. The establishment, discontinuance, or restructuring of a standing committee requires a constitutional amendment, except for committees required by Idaho SBOE policy or eliminated by the Idaho SBOE.~~

~~E. Unless otherwise indicated, no standing committee will be chaired by the administrative officer who is substantially responsible for implementing the policies or recommendations of the committee.~~

~~F. The President of the College, or her or his designee, and the Chair of the Faculty, or her or his designee, are members ex-officio, with voice, but without vote on all committees.~~

~~G. Divisions for purposes of committee membership are defined as the Library and those instructional units that are chaired by a Division Chair.~~

~~H. The tenure of individual members on standing committees may not be terminated within her or his stated term of office except for cause and with the concurrence of the Faculty Senate.~~

~~I. Committees meet on the call of the Chair. Committees may be convened by one-half (1/2) of the members on the committee with one (1) day written notice to all other members. All committees will be convened by the last week of September. A quorum for committee meetings shall consist of 50% plus one (1) committee member.~~

~~J. Proxy votes are not permitted.~~

~~K. Unless otherwise provided, all committee assignments terminate on September 1 of the year of termination.~~

~~L. Standing committees shall keep minutes and shall distribute them to all members on the committee, the Chair of the Faculty, and to the Senate Webmaster. Minutes shall be posted electronically on the Faculty Senate website.~~

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~~M. All committees shall have the power to appoint subcommittees in addition to those spelled out in this constitution for a specific purpose within the realm of that standing committee's function.~~

~~Section 2. Standing Committees of the Faculty Senate – General Information.~~

~~A. Appointment. The Faculty Senate will appoint all Faculty members on campus-wide Committees. Administrative members will be appointed by the President of the College, or designee, and student members will be appointed by Student Body President, or designee.~~

~~B. Reporting.~~

~~1. Each committee will make progress reports to the Senate when such reports are requested by the Senate Chair. These may be written or oral reports, should identify time and place of committee meetings, and should describe current status as well as future goals of the committee.~~

~~2. Recommendations for Senate action should be printed and distributed to Senate members prior to the Senate meetings at which they will be presented.~~

~~C. Meetings. Meetings will be open to general faculty except when such open meetings would be an infringement of individual rights.~~

~~D. Terms of Office. A term consists of one (1) year.~~

~~Section 3. Standing Committees of the Faculty Senate.~~

~~A. Faculty Affairs Committee.~~

~~1. Function. The responsibilities are to:~~

~~a. recommend and monitor policies regarding evaluation, promotion, tenure and merit of the Faculty;~~

~~b. conduct a continuing study of salaries, professional problems, welfare, retirement practices, and working conditions of members;~~

~~c. Coordinate and facilitate faculty development grants, sabbaticals, and offerings in concert with the Provost.~~

~~2. Structure.~~

~~a. The Faculty Affairs Committee will consist of one (1) faculty member from each Division and one ex-officio (1) representative from Student Affairs with voice but without vote.~~

~~b. The Chair-Elect of the Faculty Senate is the chair of the Faculty Affairs Committee, per Article I.6.B.3.c., with voice but without vote. If the Chair-Elect is serving as the~~

~~Division's representative on the committee, the chair will provide the Division's vote. In no instance shall any Division have more than one vote on the committee.~~

~~B. Student Affairs Committee.~~

~~1. Function. The responsibilities are to:~~

~~a. recommend college policy and monitor implementation thereof in areas related to student life and student affairs, including but not limited to: student financial aid, housing, student organizations, student health, student judicial affairs, student recreation, placement, campus union activities, counseling, and student development;~~

~~b. establish academic standards to be maintained by all students in the College and its various units.~~

~~2. Structure.~~

~~a. one (1) faculty member from each Division, at least one (1) but no more than two (2) students, one (1) Student Affairs representative, and one (1) administration representative. The student, the Student Affairs representative, and the administration representative will be ex-officio members of the committee with voice but without vote.~~

~~b. The Past Chair of the Faculty Association is the chair of the Student Affairs Committee, per Article I.6.B.4.a., with voice but without vote. If the Past Chair is serving as the Division's representative on the committee, the Past Chair will provide the Division's vote. In no instance shall any Division have more than one vote on the committee.~~

~~C. Curriculum Committee.~~

~~1. Function. The responsibilities are to:~~

~~a. generate or review all proposals pertaining to curriculum decisions, including instructional programs and courses;~~

~~b. recommend action on curriculum matters to the Faculty Senate.~~

~~2. Structure.~~

~~a. The Curriculum Committee will consist of one (1) Faculty member from each division, the Registrar, a representative from the Registrar's office to serve in the capacity of secretary for the committee, the Provost or designee, and one (1) student. The Registrar, the representative from the Registrar's office, the Provost or designee and the student will be ex-officio members of the committee with voice but without vote.~~

~~b. The chair of the Curriculum Committee will be a faculty member elected by the Curriculum Committee each spring to serve for the following academic year. The Chair of the Curriculum Committee will be an ex officio member of the Faculty Senate. If a faculty member becomes chair of the Curriculum Committee and the Division appoints~~

~~an additional divisional representative, then the committee chair will have voice but no vote; in no instance shall any Division have more than one vote on the committee.~~

~~D. General Education Committee~~

~~1. Function. The responsibilities of the General Education Committee are to:~~

~~a. review and recommend changes in General Education throughout the College and in the General Education Core Curriculum.~~

~~b. monitor the effectiveness of General Education throughout the College and the General Education Core Curriculum.~~

~~c. publicize, promote, and advocate for General Education among the students, faculty, and staff of the College.~~

~~d. maintain an ongoing study of general education philosophies and models nationwide; and~~

~~e. coordinate college-wide actions to maintain the relevance of General Education in a changing society.~~

~~2. Structure~~

~~The General Education Committee will consist of five (5) faculty elected by the Faculty Association. Each member will serve a three-year term. The members must be selected from five (5) different divisions. The chair of the committee will be elected annually by the committee from among the members of the committee.~~

~~E. Budget, Planning, and Assessment Committee.~~

~~1. Function. The responsibilities are to:~~

~~Serve as a communication link among the Faculty Senate, Divisions, and President regarding budget, planning, and assessment.~~

~~2. Structure.~~

~~a. The Budget, Planning, and Assessment Committee will consist of one (1) Faculty member from each Division, the Past Chair, and the Chair-elect. If the Past Chair or the Chair-Elect is serving as a Division's representative on the committee, that individual will provide that Division's vote. In no instance shall any Division have more than one vote on the committee.~~

~~b, The Chair of the Faculty Association shall serve as Chair of the Budget, Planning, and Assessment Committee, per Article I.6.B.1.h, with voice but without vote. If the Chair is serving as the Division's representative on the committee, the Chair will provide the Division's vote. In no instance shall any Division have more than one vote on the committee.~~

~~F. Faculty Senate Cabinet.~~

~~1. Function. The responsibilities are to:~~

~~a. serve as a clearinghouse for issues to be assigned to committees;~~

~~b. assist the Faculty Chair in attending meetings, communicating with campus groups, and monitoring policy implementation;~~

~~c. provide an advisory function for the Faculty Chair on a weekly basis.~~

~~2. Structure.~~

~~The Faculty Chair Cabinet will consist of the following members: the Faculty Chair (also the Cabinet Chair), the Faculty Chair-Elect, the Secretary/Treasurer, the Senator Chairs of each standing committee, and the Past Faculty Chair.~~

~~Section 4. Hearing Board.~~

~~A. Function. In accordance with grievance procedures as stated in the Policy and Procedures Manual, the Hearing Board shall serve as the institutional board of appeals for Faculty and students. Upon request it shall review all policy changes, testing them for consistency with the constitution. The Board shall seek such information from students, Faculty, administration, and the Idaho SBOE, as it may deem necessary to accomplish its task. It shall also conduct a continuing review of the constitution committee structure and functions, communicating its findings to the Faculty Association annually.~~

~~B. Structure.~~

~~1. Membership. The Hearing Board shall be composed of seven (7) members (the majority of whom shall be tenured): three (3) members from the faculty elected by the Faculty Association; three (3) members from the Faculty appointed by the President; and one (1) Division Chair appointed by the Faculty Senate. Three (3) alternate members will be designated: one (1) appointed by the President and two (2) appointed by the Faculty Senate.~~

~~2. Chair. The Chair shall be elected each year from the members of the Hearing Board. A Hearing Chair shall be elected for each hearing from the members of the Hearing Board. The Hearing Chair shall not be the Division Chair member of the Hearing Board.~~

~~3. Students. In cases involving students, four (4) students shall be included, with voice and vote, in the hearing board membership. The students shall be appointed by the ASLCSC President.~~

~~C. Term of Service. Membership of the Hearing Board for the subsequent academic year shall be determined prior to the last day of the spring semester. Each member shall serve for two (2) college years.~~

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~~**Section 5. Standing Tenure and Promotion Review Committee (STPRC) for academic faculty.**~~

~~A. Function. The responsibilities are to:~~

~~1. uphold the philosophy toward tenure/promotion as set forth in the Policy and Procedures Manual;~~

~~2. establish, review, and monitor tenure/promotion criteria, policies, and procedures;~~

~~3. in conjunction with the Provost's office, notify in writing faculty who are eligible to apply for tenure/promotion and provide "Request for Tenure/Promotion Evaluation" forms along with a list of contents required for the Tenure/Promotion File;~~

~~4. meet with new hires and discuss tenure/promotion process;~~

~~5. oversee and approve formation of the Individual Tenure and Promotion Committees;~~

~~6. review all applications for tenure/promotion. and forward its recommendations to the applicant, the Division Chair, the Dean, the applicant's Individual Tenure and Promotion Committee, and the Provost;~~

~~7. plan annual recognition for newly tenured/promoted Faculty;~~

~~8. oversee the periodic performance review process.~~

~~B. Structure. The seven-member STPRC will be constituted as follows: six (6) tenured faculty members (each from a different academic division), and a Chair elected by the Faculty Association at its spring meeting. Three (3) of the STPRC faculty members must hold full-professor rank.~~

~~C. Term of Service. All members will serve three-year terms. No member may serve more than one (1) consecutive term. A tenured Faculty member, elected by the Faculty Association, will serve as Chair for a one-year term and will vote in the event of a tie. No Faculty member may serve on the STPRC during an academic year when her or his own application is being considered.~~

~~D. No member of the STPRC may serve on an Individual Tenure/Promotion Committee for academic faculty.~~

~~E. In consultation with the Provost, the Committee will review its own membership for areas of conflict of interest.~~

~~**Section 6. Standing Promotion Review Committee (SPRC) for professional-technical faculty.**~~

~~A. Function. The responsibilities are to:~~

~~1. uphold the philosophy toward promotion as set forth in the Policy and Procedures Manual;~~

~~2. establish, review, and monitor promotion criteria, policies, and procedures;~~

3. ~~in conjunction with the Provost's office, notify in writing faculty who are eligible to apply for promotion and provide "Request for Tenure/Promotion Evaluation" forms along with a list of contents required for the Promotion File;~~

4. ~~meet with new hires and discuss promotion process;~~

5. ~~oversee and approve formation of the Individual Promotion Committees;~~

6. ~~review all applications for promotion and forward its recommendations to the applicant, the Division Chair, the Dean, the applicant's Individual Promotion Committee, and the Provost;~~

7. ~~plan annual recognition for newly promoted Faculty.~~

B. ~~Structure. The five-member SPRC will be constituted as follows: one (1) faculty member at the assistant professor level, one (1) faculty member at the associate professors level, one (1) faculty member at the full-professor level, one (1) faculty member at any rank, and a Chair. All members will be elected at the spring meeting of the Faculty Association.~~

C. ~~Term of Service. The associate professor faculty member will serve a three-year term; the assistant and full-professor faculty members will serve a one-year term. No member may serve more than one (1) consecutive term. A Faculty member, within the Committee, elected by the Faculty Association, will serve as Chair for a one-year term and will vote in the event of a tie. No Faculty member may serve on the SPRC during an academic year when her or his own application is being considered.~~

D. ~~No member of the SPRC may serve on an Individual Promotion Committee for professional-technical faculty.~~

E. ~~In consultation with the Provost, the Committee will review its own membership for areas of conflict of interest.~~

ARTICLE III~~V~~—AMENDMENT OF THIS CONSTITUTION

This constitution may be amended by a two-thirds (2/3) vote of the members of the Faculty Association, as defined in Article 1, Section 3, in attendance at a regular meeting, a quorum being present. Proposed amendments must have been published in full with the agenda at least one (1) week prior to the meeting or must have been presented in writing at the Faculty Association meeting previous to the one in which the vote is to be taken. Amendments to this constitution are subject to review and approval by the Idaho SBOE.

SUBJECT

President Approved Alcohol Permits Report

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 June 2016 Board meeting. Since that meeting, Board staff has received seventeen (17) permits from Boise State University, three (3) permits from Idaho State University, and thirteen (13) 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 Page 3

BOARD ACTION

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

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APPROVED ALCOHOL SERVICE AT BOISE STATE UNIVERSITY May 2016 – September 2016

EVENT	LOCATION	Institution Sponsor	Outside Sponsor	DATE (S)
Executive MBA Program Open House	College of Business and Economics	X		05/24/16
Celebration of Life for Rick Lowe	Stueckle Sky Center		X	05/28/16
Prolific Fundraising Event	Stueckle Sky Center		X	06/04/16
Dairy Booster Auction	Stueckle Sky Center	X		06/10/16
50 Year Reunion	Stueckle Sky Center		X	06/11/16
Blue Cross of Idaho Event	Stueckle Sky Center		X	06/13/16
Neil DeGrasse Tyson Speaker	Morrison Center	X		06/15/16
Executive MBA Program Open House	College of Business and Economics	X		06/21/16
Father Larry Dinner Event	Stueckle Sky Center		X	06/23/2016
2016 Family Medicine Residency Graduation	Student Union Building		X	06/25/16
Widespread Panic – Concert	Taco Bell Arena	X		06/30/16
KISS Rock Concert	Taco Bell Arena	X		07/07/16
Awards Banquet for Top Company Performers	Stueckle Sky Center		X	07/11/16
Harper/Wendlandt Wedding	Stueckle Sky Center		X	07/15/16
Concert to Entertain Ticket Holders (of James Taylor)	Taco Bell Arena	X		07/20/16
Centennial High Class of 1996 20 Year Reunion	Stueckle Sky Center		X	07/23/16
Idaho Flight Basketball Fundraiser	Student Union Building		X	09/17/16

APPROVED ALCOHOL SERVICE AT IDAHO STATE UNIVERSITY
July 2016 – August 2016

EVENT	LOCATION	Institution Sponsor	Outside Sponsor	DATE (S)
IEA Summer Institute Conference Social	SUB		X	07/28/16
Skaggs Pre-Conference Reception	Performing Arts Center – Rotunda	X		08/03/16
Skaggs Poster Presentation	Leonard Hall	X		08/04/16

APPROVED ALCOHOL SERVICE AT UNIVERSITY OF IDAHO June 2016 – November 2016

EVENT	LOCATION	Institution Sponsor	Outside Sponsor	DATE (S)
2016 Men's Golf League	UI Golf Course	X		06/09/2016-08/25/2016
Prichard Friends Preview Reception	Prichard Art Gallery	X		06/16/16
Hammel Retirement Reception	Common Horizon Room	X		06/16/16
Wendy Nelson Celebration of Life	Kibbie Dome	X		06/20/16
UI and Limagrain Cereal Seeds Field Day	Parker Research Farm, 1025 Science Rd, Moscow, ID 83843	X		07/06/16
Western Wheat Workers Meeting	Parker Research Farm, 1025 Science Rd, Moscow, ID 83843	X		07/07/16
Corner Club Open	UI Golf Course		X	07/09/16
Stephen Johnson/Jodi Prout Wedding	McCall Outdoor Science School, 1800 University Ln., McCall, ID 83638		X	08/07/2016
Executive MBA Program Golf Scramble	UI Golf Course	X		08/09/2016
New Faculty Orientation Dinner	Common Horizon Room	X		08/16/16
Faculty Reception	Bruce Pitman Center	X		09/13/16
Athletic Hall of Fame Induction and Dinner	Bruce Pitman Center	X		10/14/16
Faculty and Staff Holiday Reception	Bruce Pitman Center	X		11/30/16

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SUBJECT

Appointment to the Professional Standards Commission (PSC)

REFERENCE

August 2015	Board approved one appointment to the Professional Standards Commission.
April 2016	Board requested changes to the recommendation for appointments to the Professional Standards Commission to reflect a more diverse geographical representation of the state.
June 2016	Board approved six appointments and two re-appointments to the Professional Standards Commission and discussed changing practices and reaching out to broader communities when filling openings on the Commission in order to assure more equal representation and diversity of the members.

APPLICABLE STATUTE, RULE, OR POLICY

Section 33-1252, Idaho Code

BACKGROUND/DISCUSSION

Section 33-1252, Idaho Code sets forth criteria for membership of the Professional Standards Commission (PSC). The PSC consists of eighteen (18) members, one (1) from the State Department of Education (SDE) and one (1) from the Division of Career Technical Education (CTE). The remaining members shall be representative of the teaching profession of the state of Idaho, and not less than seven (7) members shall be certificated classroom teachers in the public school system and shall include at least one (1) teacher of exceptional children and at least one (1) teacher in pupil personnel services. The Idaho Association of School Superintendents, the Idaho Association of Secondary School Principals, the Idaho Association of Elementary School Principals, the Idaho School Boards Association, the Idaho Association of Special Education Administrators, the education departments of private colleges, and the colleges of letters and sciences of the institutions of higher education may submit nominees for one (1) position each. The community colleges and the education departments of the public institutions of higher education may submit nominees for two (2) positions.

Nominations were sought for the open position from the Idaho School Superintendents Association. Resumes for interested individuals listed below are included in the attachments.

School Superintendents:

- Trina Caudle, Coeur d'Alene School District
- Nicole MacTavish, Nampa School District
- Marjean McConnell, Bonneville Joint School District

ATTACHMENTS

STAFF COMMENTS AND RECOMMENDATIONS

At the June 2016 Board meeting it was determined that the Department would amend its practices when filling positions on the Professional Standards Commission. The new practice would be to reach out not only to the identified stakeholder groups, but to also reach out to other education community groups to allow individuals who are not connected to the standard communications the opportunity to apply or submit nominations for open positions. Specifically, it was discussed that there was a need for educators who work with our underserved populations to have the opportunity to serve on the community, including our American Indian educators. The Board's Indian Education Committee expressed an interested in nominating individual educators to the Commission if notified of openings.

BOARD ACTION

I move to appoint Marjean McConnell as a member of the Professional Standards Commission for the remainder of the three-year term which began July 1, 2014, and will end June 30, 2017, representing School Superintendents in Idaho.

Moved by __________ Seconded by __________ Carried: Yes ____ No ____

2016-2017 Professional Standards Commission Members

Clara Allred
Special Education Administrator
Twin Falls SD #411

Margaret Chipman
School Board Member
Weiser SD #431

Steve Copmann
Secondary School Principal
Cassia County Joint SD #151

Kathy Davis
Secondary Classroom Teacher
St. Maries Joint SD #41

Kristi Enger
Career-Technical Education
Division of Career-Technical Education

Mark Gorton
Secondary Classroom Teacher
Lakeland Joint SD #272

Dana Johnson
Private Higher Education
Brigham Young University - Idaho

Pete Koehler
State Department of Education
Idaho Department of Education

Charlotte McKinney, Chair
Secondary Classroom Teacher
Mountain View SD #244

Mark Neill
Public Higher Education
Idaho State University

Taylor Raney
Public Higher Education
University of Idaho

Tony Roark
Public Higher Education – Letters and Sciences
Boise State University

Elisa Saffle
Elementary School Principal
Bonneville Joint SD #93

Donna Sulfridge, Vice Chair
Elementary Classroom Teacher
Mountain Home SD #193

Ginny Welton
Exceptional Child Education
Coeur d'Alene SD #271

Mike Wilkinson
School Counselor
Twin Falls SD #411

Kim Zeydel
Secondary Classroom Teacher
West Ada SD #2

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Coeur d'Alene Public Schools
DISTRICT ADMINISTRATIVE CENTER
1400 N. Northwood Center Court, Coeur d'Alene, ID 83814

OFFICE 208.664.8241
FAX 208.664.1748
www.cdaschools.org

May 11, 2016

Kristen Shreve
Director of Operations
Idaho Association of School Administrators
777 S. Latah Street
Boise, ID 83705

RE: Professional Standards Commission Appointment

Dear Kristen,

I am writing this letter to express by great interest in serving on the Professional Standards Commission representing the Idaho Association of School Administrators. In public education teachers and certificated staff are our most valuable resource, impacting the lives and education of our students. Therefore, we must take great care in attracting high quality individuals, ensuring teachers are prepared for the classroom, ensuring principals are prepared to lead in a time of constant change, provide certificated staff in all areas multiple opportunities to learn and grow as a professional, hold staff to high standards of conduct, and value each person as a professional.

My personal, educational and professional experiences enable me to bring a variety of perspectives and expertise to the Professional Standards Commission. The Commission has an important role in making recommendations to the State Board of Education, providing leadership on professional standards and accountability, and ensuring Idaho has competent, qualified and ethical educators in the classroom while cultivating our greatest resource. As a member of the commission, my role would be to tap into those perspectives and expertise, and collaborate with other members to meet the mission and vision of the commission while always serving as an advocate for all students in Idaho.

It would truly be an honor to serve on the commission. Thank you for your time and consideration.

Sincerely,

Trina C Caudle

Trina C. Caudle. Ed.D.
Director of Secondary Education
tcaudle@cdaschools.org

INVEST | INSPIRE | INNOVATE
We invest in each student to prepare, challenge and advance
well-educated, resilient and future-ready citizens.

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TRINA MCGEE CAUDLE, ED.D.
1230 E. Elderberry Circle
Coeur d'Alene, ID 83815
(208) 449-9593
caud9541@gmail.com

CAREER GOALS: *To ensure students and staff are continually learning and growing, to exemplify positive instructional leadership in a public education setting, and to serve as an advocate for students within the Coeur d' Alene community and state of Idaho.*

PROFESSIONAL PREPARATION

University of Idaho	Doctor of Education May 2014
Idaho State University Major: Superintendency	Educational Specialist May 2005
University of Alaska, Anchorage Major: Public School Administration K – 12	Masters Degree August 1997
University of Idaho Major: Secondary Education, Physics & Math	Bachelor of Science Degree May 1989
United States Military Academy, West Point Concentration: Math, Science & Leadership	July 1985 – July 1987

PROFESSIONAL EXPERIENCES

LEADERSHIP

Coeur d'Alene School District #271, Coeur d' Alene, ID
Director of Secondary Education, July 2014 - Present

Idaho Falls School District #91, Idaho Falls, ID
Assistant Superintendent, July 2012 - 2014
Director of Secondary Education, July 2010 – 2012

Skyline High School, Idaho Falls, ID
Principal, 2005 - Present
Assistant Principal, 2000 – 2005

Small Business Owner, 1999 – 2001
Kids R Us, Inc. DBA Cubby's

TEACHING

Clair E. Gale Junior High School, Idaho Falls, ID
Secondary Mathematics, 1999 – 2000

Bartlett High School, Anchorage, AK
Secondary Mathematics, 1991 – 1999
C-Team Girls Basketball Coach, 1991-92 Season

Sandpoint High School, Sandpoint, ID
Secondary Math and Science, 1989 – 1991
Freshman Girls' Basketball Coach, 1989 – 1991
Track Distance Coach, 1989 – 1991

PROFESSIONAL ORGANIZATIONS & MEMBERSHIPS

Coeur d'Alene Chamber of Commerce - CDA Leadership Class of 2016
Association for Supervision and Curriculum Development (ASCD)
Association for Career and Technical Education (ACTE)
Idaho Association of School Administrators (IASA)
Phi Kappa Phi Honor Society

GENERAL SERVICE

Safe Passage Violence Prevention Center, Board Secretary (2014 – present)
Daughters of the American Revolution (2012 – present)
Task Force Member, Idaho State Migrant Education Program Statewide Needs Assessment Task Force (2009 – 2011)
Committee Member, iSTEM Governance Steering Committee (2009 – 2011)
Board Member, Idaho Falls YMCA (2002 – 2005)

NOTABLES/ACCOLADES

Nominated for British Petroleum (BP) Teacher of Excellence, Third Quarter, 1996
Co-Author of Awarded Federal Character Education Grant, Fall 2004
Author of Awarded State LEP Implementation Grant, December 2006
Author of Awarded State LEP Implementation Grant, December 2007
Idaho Falls Education Association Excellence in Administration, 2008 – 2009 SY

REFERENCES

Matt Handelman, Superintendent, Coeur d' Alene School District #271
1400 N. Northwood Center Court, Coeur d' Alene, ID 83814
(208) 664-8241

George Boland, Superintendent, Idaho Falls School District #91
690 John Adams Parkway, Idaho Falls, Idaho 83401
(208) 525-7519

Kathy Canfield-Davis, Ph.D.
University of Idaho, Coeur d' Alene Campus
(208) 292-1286

Deborah Long, Idaho Capacity Builder Regional Coordinator
University of Idaho, Coeur d' Alene Campus
(208) 292-1408

NAMPA

School District No. 131

619 S. Canyon St. ⊙ Nampa, ID 83686
(208) 468-4600 ⊙ Fax (208) 468-4638
www.nsd131.org

May 31, 2016

Kristen Shreve
Director of Operations
Idaho Association of School Administrators
777 S. Latah Street
Boise, ID 83705

Dear Ms. Shreve:

I am writing to apply for the opening on the Professional Standards Commission. I am hoping that my diverse background, my education, and my experience might be the right fit for this opening. I have a strong passion for this work and know how important the work of the commission is in shaping the experiences our students have in Idaho's schools.

I have had the great opportunity to have many experiences in public education. At the classroom level, I've served as a high school counselor, a high school English teacher, and an Associated Student Body Advisor. I've also served in several leadership capacities at the building level: middle school assistant principal, high school assistant principal, middle school principal, and high school principal. In addition, I've had the opportunity to serve in several capacities at the district level as a Special Education Director, an Executive Director of Curriculum and Instruction, and now as Assistant Superintendent.

In these roles I've served schools districts as small as 1500 students to as large as 26,000 students; in districts so rural that getting teachers to professional development took a ferry ride and a 3 hour drive, to sprawling suburban 'bedroom' districts, to an urban school district serving families speaking over 140 different languages. I'm hopeful that my first line experiences with the greatly varying challenges in all these different contexts will be helpful to the work of the commission.

I've also had the opportunity to see how professional standards shape the non-profit world when I served as the Director of the University of Washington's Experimental College and as I ran a Boys and Girls' Club of America on an US Army base in Stuttgart, Germany.

Finally, after earning my Masters of Education and my Doctor of Education, I had the great opportunity to get deep into the weeds with professional standards when I was lucky enough to be selected to attend the Human Relations in in Educational Leadership (HELP) Certification offered in partnership between Willamette University the Confederation of Oregon School Administrators. This HR certification course vastly deepened my understanding of the importance of professional standards and the place standards commissions play in the ecosystem of public education.

As I led in both the public education sector and in the non-profit world, it became increasingly evident to me that the standards by which we define the professionals in our field matter. Even in an industry and in areas where we sometimes struggle to find qualified applicants, we have a responsibility to maintain strong professional standards to shape the work we do in service to kids and to families.

I would love the opportunity to join the commission and would jump at the chance if offered.

I very much appreciate your consideration of my application. I have attached my resume and would welcome any questions via phone or email.

Thank you!

Nicole MacTavish, Ed.D.
Assistant Superintendent, Nampa School District

DR. NICOLE MACTAVISH

Address: 121 East Victory Road #N204 ● Meridian, ID 83642
Cell Phone: 208.573.9047 ● Work Phone: 208.468.4600
Home email: nmact@mac.com
Work email: nmactavish@nsd131.org

EDUCATION

Willamette University & Oregon School Personnel Association **7/15/13**
- Human Resources in Educational Leadership (HELP) Certification

Doctor of Education **Seattle University** **6/13/10**
- Educational Leadership with Superintendent Certification
- Cognate in Human Resources Management
- 4.0 Grade Point Average

Principal Certification Program **Western Washington University** **6/15/02**
- 4.0 Grade Point Average
- Washington State Funded Educational Intern grant recipient

Master of Education **University of Washington** **3/15/96**
- 3.95 Grade Point Average

Bachelor of Arts in English **University of Washington** **6/10/94**
- Magna Cum Laude
- Phi Beta Kappa
- With Distinction in English
- Minor in psychology

Bachelor of Arts in Communications **University of Washington** **6/10/94**
- Magna Cum Laude
- Phi Beta Kappa
- Minor in journalism

CERTIFICATION

Idaho Superintendent Certification
Idaho Principal Certification
Oregon Superintendent Certification
Oregon Principal Certification
Washington State Superintendent Certification
Washington State Continuing Principal Certification
Washington, Oregon and Idaho Continuing Teacher Certification

PROFESSIONAL EXPERIENCE

Assistant Superintendent **7/14 - present**
Nampa School District: 15,000 students
- Brought in by newly hired superintendent to assist in district 'turn around' after 5 million dollar district shortfall
- Oversight of district wide Curriculum and Instruction, Assessment, SPED and 504, Career Technical Education, Professional Development, Title IA, Title IIA, Title III & State level LEP, State Technology, Safety
- Revised the Teaching and Learning department organizational chart and replaced every Cabinet level position in the department (Directors of SPED, Compensatory Services, Assessment, and CTE)

- Directly responsible for $21 million in district budget
- Created budgeting and oversight process for all budgets in area of responsibility, budgets now in the black and meeting all local, state and federal requirements
- Created district level SPED quality review process and implemented district wide SPED 'boot camp' professional development, resulting in zero lawsuits and zero Office of Civil Rights complaints over the course of two years
- Implemented Professional Learning Communities district wide
- Created and implemented district definition of Guaranteed and Viable Curriculum
- Created and implementing a Strategic Plan to address findings of Phi Delta Kappa Curriculum Audit
- Created district curriculum adoption process and supporting $2 million annual budget, successfully implementing the first curriculum adoption in over 15 years
- Completed PreK-5 ELA curriculum adoption, in process of adopting 6-12 ELA, with PreK-12 math adoption scheduled in 2016-2017
- Created and implemented district wide Professional Development plan to address areas of greatest need (ELA, math, SPED, ELL)
- Directly responsible for transitioning district to a 1:1 environment for students and teachers
- Created visioning team to research and stand up a new blended learning high school, wrote successful $1.5 million grant from private foundation for school start-up costs

Principal, Redmond High School **6/12 – 7/14**
Redmond School District: 7,000 students

- leader of a comprehensive high school serving 1200 students in grades 9 – 12
- building leader during $10 million school renovation project lasting 14 months
- implemented Writing Across the Curriculum initiative in every content area, using a common, school-wide CCSS-based assessment rubric
- brought previously disparate counseling, college, and career advising programs under one roof and created a common mission for the new College and Career Center, focusing on graduation and college admission
- implemented school-wide common assessments in English and math
- implemented common syllabi for all like classes, school-wide
- established common academic vocabulary for all like classes, school-wide
- initiated standards-based grading pilot
- District Leadership Team member for CCSS Math Implementation Team
- District Leadership Team member for CCSS English Language Arts (ELA) Implementation Team
- designed and led school-wide "Special Education 101" training program for all certificated staff
- established school Facebook presence for increased student, parent, and community communication
- trained extensively in Charlotte Danielson's "Framework for Teaching" evaluation model
- Cascade Commitment workgroup member - won $445,000 grant to 'replicate' Eastern Promise in Central Oregon
- authored successful $478,000 Career Technical Education Revitalization Grant application to revitalize manufacturing program
- Re-Imagining Grades 9-14 COSA/OASE Workgroup – identifying barriers and solutions for Oregon educational and policy leaders (final document on COSA website)

Assistant Director, Secondary Inclusive Education **1/11 – 6/12**
Kent School District: 26,000 students

- oversight of special education at the middle and high school levels (6 middle schools, 4 high schools, 2 secondary alternative schools)
- District Support Team member – intensive support directly to all underperforming secondary schools to improve core reading and math instruction
- principal of district's program for 18 – 22 year old SPED students called The Outreach Program (TOP) serving 65 Developmentally Disabled students as they transition from school to adult living and work
- collaborate with secondary building administrators and staff on: creating parent-friendly and compliant individual education plans (IEPs), developing clear and well aligned IEP goals, Section 504 compliance, special education and discipline and all secondary state assessments.
- serve on the district-wide Instructional Leadership Support Team utilizing district and building data to drive district's school improvement initiatives
- member of the High School Instructional Council charged with oversight of curriculum and instruction at the high school level
- extensive training in SIOP instructional strategies and PLC implementation

Assistant Director **Child, Youth and School Services** **2/10 – 1/11**
United States Army Garrison, Stuttgart, Germany

- oversight of Panzer Kaserne Youth Center, a chartered Boys and Girls Club of America
- directed programs for culturally, ethnically, and socioeconomically diverse youth
- doubled youth center attendance in less than a year
- prepared and executed youth center budget, including all personnel expenses
- oversight of CYMS computer database which tracked all youth, family, and center operational data
- hired and evaluated building staff
- oversight of facility and grounds, both maintenance and operations
- designed and implemented continuous improvement process for instructional programming
- trained extensively in emergency response and certified by FEMA and the United States Army as first line incident response leader
- lead center through program inspection processes for the United States Army and Boys and Girls Clubs of America

Associate Principal **Oak Harbor High School** **7/04 – 8/08**
Oak Harbor School District: 6000 students

- High Schools That Work school improvement administrative team leader
- oversight of special education including self-contained life skills and EBD programs
- built high school master schedule for 86 teachers and 1,700 students in grades 9 – 12
- administered Advanced Placement programs
- led Northwest Accreditation process
- Section 504 Compliance Officer
- implemented new student data management system implementation
- staff trainer for Associated Student Body (ASB) law, data management, computerized grading, writing across the curriculum and 6-trait writing assessment
- oversight of ASB activities and budget
- implemented student on-line pre-registration and registration processes
- district bargainer for classified union negotiations
- district math improvement team member
- district boundary committee member – realigned boundaries for K-8 schools
- OSPI Regional Expert and trainer for Washington State graduation exam
- developed and implemented school-wide reading and writing initiatives resulting in scores increasing to 81% proficiency in reading and to 85% proficiency in writing

- district levy planning committee member
- high school modernization committee member
- Newcomer's Team member - part of a three member team that developed family friendly materials, procedures, and website interfaces for families new to Oak Harbor
- part of the high school administrative team that developed and implemented 9th grade teaming model called "Islands"
- budget reconciliation team member – developed recommendations for a multi-tiered approach to deep district budget cuts over a period of three years
- won the Excellence In Education Award for a successful $10,000 grant application to expand Advanced Placement offerings

Assistant Principal **North Whidbey Middle School** **7/03 – 7/04**
Oak Harbor School District: 6000 students

- lead school improvement process using state's school improvement (SIPTAP) process
- oversight of staff team meetings – daily meetings held by grade level instructional teams to work on cross-curricular projects and discuss specific student issues and concerns
- evaluated certified and classified staff
- managed athletic and Associated Student Body budgets
- served as building athletic director
- established partnership with school PTA, counselors and psychologist to offer evening workshops for parents on the topics of middle school students' physical development and psychology and strategies for parents to help their students through these issues
- developed and implemented written guide to explain building discipline processes and consequences in lay terms to create transparency for families

Co-Principal **Blue Heron Middle School** **7/02-6/03**
Port Townsend School District: 1500 students

- created and implemented Saturday School program for students with failing grades which dramatically reduced student failure rates
- evaluated certified and classified staff
- administered reading tutor volunteer program
- oversight of special education including program for severely behaviorally disturbed students
- oversight of grade level teaming model

Teacher **Oak Harbor High School** **8/97 – 6/02**

- taught 9th grade English, 9th Grade English/Technology Block, Advanced 9th grade English, 11th grade Intermediate Writing, and Leadership Development
- created new curriculum for Advanced 9th Grade English
- Oak Harbor Education Association Treasurer

Associated Student Body Activities Adviser **Oak Harbor High School** **8/97 – 6/02**

- won Excellence in Education Award for work with high school ASB
- awarded Washington State Student Council of Excellence award five years in a row
- trained extensively in ASB law
- produced school events, assemblies, talent shows and dances
- developed accounting system and maintained detailed records of ASB budget

Counselor **Oak Harbor High School** **2/97 – 8/97**

- counseled students in grades 9 – 12 for both academic and personal growth
- trained in conflict mediation, suicide prevention, effects of poverty on families
- oversight of content and publishing of school course catalog and graduation guides
- member of school's budget committee

Director **Univ. of Washington Experimental College** **6/91 – 6/94**

- lead the Experimental College, a non-profit division of the University of Washington offering not-for-credit community based classes for exploration, enrichment, and enjoyment
- lead a staff of 25 in all operations of the college including course offerings and curriculum, human resource management, accounting, data management, publishing, and marketing
- managed a budget in excess of $500,000
- hired and evaluated staff and course instructors
- produced and distributed a quarterly catalog of approximately 250 classes
- re-designed the course catalog to allow for bulk rate mailing at a 30% savings
- wrote the specifications for, ran the bid process for, and selected and implemented a new computer system for student registration and course tracking for the college which had previously managed all of these functions manually

COMMUNITY LEADERSHIP

- Nampa Chamber of Commerce: Leadership Nampa Graduate
- Central Oregon Community College: Presidential Search Committee Member
- Redmond Economic Development Incorporated (REDI) Director
- Redmond Chamber of Commerce: Leadership Redmond Graduate
- City of Redmond: Parks Commissioner
- City of Redmond: Budget Committee Member
- Boys and Girls Clubs of Central Oregon: Board Member
- Redmond School District Achievement Compact: Committee Member
- Redmond Rotary: Member
- YWCA of Seattle: Past Board Member
- League of Women Voters Whidbey Island: Past Board Member
- Soroptimist International of Oak Harbor: Past Scholarship Chairperson
- YMCA of Seattle – Metro Center: Past Volunteer GED Instructor

PRESENTATIONS & PUBLICATIONS

- Presenter and Panel Member: Redmond Economic Development, Inc. (REDI): *Manufacturing – Redmond's Global Presence*
- COSA Workgroup Publication: *Re-Imagining Grades 9 – 14*

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May 16, 2016

To Whom It May Concern:

I am writing to express my interest in serving on the board of the Professional Standards Commission. I have 38 years of experience in education, which includes 17 years of classroom teaching and 21 years of administrative experience. I was the Director of Human Resources at Bonneville School District 93 from 2004 to 2011, so I am very aware of the roles and responsibilities of the Professional Standards Commission. I currently serve as the Deputy Superintendent.

My experience will be an asset to the Professional Standards Commission. I am a strong advocate for Idaho students, committed to providing the best education to all students. I believe it is crucial for Idaho schools to have competent and qualified teachers. I am excited to collaborate with others to work towards that common goal.

Attached is a copy of my resume. I received a Bachelor's Degree in Elementary Education from Boise State University, as well as a Master's Degree and Ed.S degree in Educational Administration from Idaho State University. I look forward to hearing from you.

Sincerely,

Marjean McConnell
Deputy Superintendent

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Marjean McConnell

Deputy Superintendent Bonneville School District 93
3497 North Ammon Road Idaho Falls, Idaho 83401
Office 208-557-6850 Fax 208-529-0104 email mcconnem@d93.k12.id.us

Education:

- Educational Specialist, Idaho State University, Pocatello, Idaho
- M. Ed. Educational Administration, Idaho State University, Pocatello, Idaho
- B. A., Elementary Education, Boise State University, Boise, Idaho

Experience:

- Deputy Superintendent, Bonneville School District 93, Idaho Falls, Idaho [1 year] 11,000 students, 535 certified staff, 652 classified staff, and 92 million in budgetary responsibility
- Assistant Superintendent, Bonneville School District 93, Idaho falls, Idaho [4 years] 9,000 students, 502 certified staff, 487 classified staff, and 86 Million in budgetary responsibility
- Human Resources Director, Bonneville School District 93, Idaho Falls, Idaho [4 years], 8000 students, 462 certified staff, 435 classified staff, and $350,000.00 budgetary responsibility
- Principal, Clair E. Gale Junior High School, Idaho Falls School District #91, Idaho Falls, Idaho [5 years], 850 students, 50 certified staff, 35 classified staff, $125,000.00 budgetary responsibility
- Principal, Longfellow Elementary School, Idaho Falls School District #91, Idaho Falls, Idaho [5 years], 500 students, 32 certified staff, 17 classified staff, $18,000.00 budgetary responsibility
- Head Teacher, Osgood Elementary School, Idaho Falls School District #91, Idaho Falls, Idaho [3 years], 200 students, 10 certified staff, 8 classified staff, $9,000.00 budgetary responsibility
- Classroom Teacher, Idaho Falls School District #91, Idaho Falls, Idaho, Grades K, 3 and 5, [6 years]
- Classroom Teacher, Bonneville School District Number 93, Idaho Falls, Idaho, Grades 3, 5, and 6, [7 years]

Professional Associations and Activities

- Idaho Leads Studio Group
- Idaho Association of School Administrators
- Bonneville School District Number 93 Negotiating Team
- Idaho Falls School District #91 Negotiating Team
- Albertson's Schools of Excellence Leadership Team
- Selection Committee for the Dean of Education, Idaho State University
- Association of Supervision and Curriculum Development
- Idaho Association of Supervision and Curriculum Development; Secretary
- National Science Foundation Grant Reading Team
- Idaho Association of Supervision and Curriculum Development; Board of Directors
- Idaho Reading Association
- Idaho Reading Association; Reading Conference Chair
- State of Idaho Textbook and Improvement of Instruction Committee
- Eastern Idaho Reading Council; Vice President/Chair Regional Conference
- District Compliance Officer

University Classes Taught:

Developing Capable People	Brigham Young University-Idaho
Crucial Conversations Crucial Confrontations	Northwest Nazarene College
Differentiation of Instruction	Northwest Nazarene College

- Assessment Literacy — Brigham Young University-Idaho

Professional Presentations:

- Idaho School Board Association Annual Conference — Understanding Assessment
- Idaho Association of School Administrators — Working With Adolescents
- Kiwanis Club — Emergent Readers
- Chamber of Commerce — Gifted Students
- Chamber of Commerce Education Committee — Student Government

Committee Work:

- Superintendent's Cabinet
- District Professional Leadership Team
- District Improvement Team
- Administrative Professional Development
- District Staff Professional Development
- Alternative Compensation Review Committee
- Consolidated Plan Title II
- Teacher Evaluation Instrument, Chair
- Extracurricular Pay Committee, Chair
- Policy Review and Revision
- Professional Council
- Risk Management
- Sick Leave Bank
- Strategic Planning
- District Chair Report Cards Committee

Community Affiliations:

- Kiwanis
- Selective Service Board Member
- Bonneville County Small Claims Court Negotiator
- Advantage Management Cooperation; Board of Directors
- Saint Mark's Soup Kitchen
- Community Thanksgiving Dinner
- Idaho Falls Quilt Guild

References

- Charles Shackett, Superintendent of Schools, 3497 North Ammon Road, Idaho Falls, Idaho 83401, 208-525-4400, cshackett@d93.k12.id.us
- Bruce Roberts, Former Deputy Superintendent of Schools, 4180 Wanda Street Ammon Idaho, 83401
- Michaelena Hix, Director of Curriculum and Instruction, 3497 North Ammon Road Idaho Falls, Idaho 83401 208-557-6820
- Craig Lords, School Board Chairman, 2440 Bodily Circle, Idaho Falls, Idaho 83401, 208-612-8249
- Doug Nelson, School District Attorney, 490 Memorial Drive, Idaho Falls, Idaho, 83401, 208-522-3001
- Dr. John Murdoch, Superintendent of Schools West Jefferson, 289 Marjacq Drive, Idaho Falls, Idaho
- Sharron Parry, City Council Member, 2705 Homestead Lane, Idaho Falls, Idaho, 208-523-6339

SUBJECT

Adoption of Computer Applications curricular materials and related instructional materials as recommended by the Curricular Materials Selection Committee.

REFERENCE

August 2014	Board approved the Computer Applications Curricular Review.
August 2015	Board approved the Computer Applications Curricular Review.

APPLICABLE STATUTE, RULE, OR POLICY

Section 33-118, 33-118A, Idaho Code
IDAPA 08.02.03.128 – Rules Governing Thoroughness

BACKGROUND/DISCUSSION

The Administrative Rules of the State Board of Education, IDAPA 08.02.03.128, describes 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" (Section 33-118A, Idaho Code). Idaho is a multiple adoption state which means Idaho recommends multiple titles from multiple publishers in a specific content area. The Curricular Materials Selection Committee (CMSC) is charged with the responsibility to screen, evaluate, and recommend curricular materials for adoption by the State Board of Education.

For 2016, the annual adoption clause allows for submissions in the subject area of K-12 Computer Applications. This year the curricular materials review was held on June 17, 2016. Ten (10) content area specialists assisted the six (6) selection committee members in the evaluation of the curricular materials.

IMPACT

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. This process maintains local control in the choice of instructional materials by providing multiple lists 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.

ATTACHMENTS

STAFF COMMENTS AND RECOMMENDATIONS

Staff recommends approval.

BOARD ACTION

I move to approve the adoption of the Computer Applications curricular materials and related instructional materials recommended by the Curricular Materials Selection Committee as submitted in Attachment 1.

Moved by __________ Seconded by __________ Carried Yes _____ No _____

2016
Curricular Materials
Recommendations

Curricular Materials
Adoption Process

Idaho State Department of Education

Sherri Ybarra

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 2016 Session called for reviewing curricular materials in the interim subject area of Computer Applications.

Several of these materials have accompanying electronic instructional media. Others are deliverable via CD-ROM or the Online on 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.

IDAHO

STATE DEPARTMENT OF EDUCATION
CURRICULAR MATERIALS ADOPTION PROCEDURES

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. This process maintains local control in the choice of instruction materials by providing multiple lists 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. It is recommended that districts choose materials from the list of vetted and approved materials. School districts are not required to choose materials from this list.

Idaho adopts materials in the areas of English Language Arts, Dictionary, Thesaurus, and Speech; Limited English Proficiency/English Language Development; Mathematics; Professional Technical Education: Agriculture and Natural Resources, Business and Marketing Education, Engineering and Technology, Family and Consumer Sciences, Health Professions, Individualized Occupational Training, and Skilled and Technical Sciences; Humanities: Interdisciplinary, World Languages, Art, Drama/Theatre, Dance, Music; Drivers Education; Healthy Life Styles: Health/Wellness, and Physical Education; Social Studies: History, Geography, and Government; Economics; Science; and Computer Applications (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.

There are advantages to adopting curricular materials at the state level:

- Contract prices are adhered to for six years (five years for interim adopted materials), 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 Idaho contract has been signed.

- Most textbook publishers maintain inventory at the state depository, Caxton Printers, Ltd. 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 to get 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 material and internet based instructional material (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 State Board of Education (SBOE), has the responsibility of overseeing the adoption process for the state. The Executive Secretary of this Committee is an employee of the State Department of Education (SDE).

The membership on the Selection Committee is comprised of at least 10 members who may include:

- secondary administrator(s)
- elementary administrator(s)
- secondary teacher(s)
- elementary teacher(s)
- parent representative(s)
- district school board member(s)
- representative from private/parochial schools
- representative who is not a public school educator nor trustee
- representative(s) from the state's colleges of education
- representative from the Division of Professional-Technical Education
- content area coordinator(s) from the State Department of Education
- the Executive Secretary from the State Department of Education

All members are appointed by the SBOE for a five-year term with the exception of the SDE content coordinators and the representative from Professional-Technical

Education who serve for one year. Current Committee members are listed in a separate document.

The Committee, assisted by specialists from throughout the state, meet 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, contracts are mailed to the publishing companies. After the return of signed contracts, the listing of newly adopted materials will be published in the State Department of Education website Adoption Guide found at: http://www.sde.idaho.gov/academic/curricular/materials.html.

A state curriculum library is maintained at Caxton 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

Albertson Library
Boise State University
Boise, Idaho

David O. McKay Library
Brigham Young University-Idaho
Rexburg, Idaho

University of Idaho Library
University of Idaho
Moscow, Idaho

Instructional Materials Center
Idaho State University
Pocatello, Idaho

Curriculum Library
Lewis Clark State College
Lewiston, Idaho

John Riley Library
Northwest Nazarene University
Nampa, Idaho

Complete addresses for the Regional Centers can be found at the Schools/Regional Centers link: http://www.sde.idaho.gov/academic/curricular/contact/Curricular-Materials-Regional-Centers.pdf.

The citizens of Idaho may request that the Committee reconsider any material under adoption. The *Textbook Adoption Process: Request for Reconsideration of Materials* form can be found at Schools/Request for Reconsideration of Materials Form: http://www.sde.idaho.gov/academic/curricular/materials/files/adoption-process/Adoption-Process-Reconsideration-of-Materials-Form.pdf.

The Committee considers all requests and maintains the rights to either recommend continued adoption or remove any materials from the adopted list.

IDAHO
Curricular Materials Selection Committee
Appointed by the State Board of Education
2016

COMMITTEE MEMBER	CONTACT INFORMATION
Executive Secretary, Idaho State Department of Education **Elizabeth Flasnick** Coordinator, Curricular Materials and Online Course Review Idaho State Department of Education PO Box 83720 Boise, ID 83720-0027	Phone: 208-332-6967 E-mail: eflasnick@sde.idaho.gov
Curriculum Consultant, Idaho State Department of Education (Ex-officio) **Diann Roberts** Coordinator, English Language Arts/Literacy Idaho State Department of Education PO Box 83720 Boise, ID 83720-0027	Phone: 208-332-6948 E-mail: droberts@sde.idaho.gov
Curriculum Consultant, Division of Professional Technical Education **Kristi Enger** State Division of Professional Technical Education PO Box 83720 Boise, ID 83720-0095	Phone: 208-334-3216 E-mail: kenger@pte.idaho.gov 5-Year Term Expires: May 31, 2019
Curriculum Consultant, Idaho State Department of Education (Ex-officio) **Nichole Hall** Coordinator, Mathematics Idaho State Department of Education PO Box 83720 Boise, ID 83720-0027	Phone: 208-332-6932 E-mail: nhall@sde.idaho.gov
Curriculum Consultant, Idaho State Department of Education (Ex-officio) **Rick Kennedy** Coordinator, Instructional Technology PO Box 83720 Boise, ID 83720-0027	Phone: 208-332-6852 E-mail: rkennedy@sde.idaho.gov
Curriculum Consultant, Idaho State Department of Education (Ex-officio) **Audra Urie** Coordinator, Driver Education PO Box 83720 Boise, ID 83720-0027	Phone: 208-332-6984 E-mail: aurie@sde.idaho.gov

Representative of the State's Institutions of Higher Education **Sarah Anderson** Boise State University	Phone: E-mail: 5-Year Term Expires: October 31, 2020
Representative of the State's Institutions of Higher Education **Lori Conlon Khan** Boise State University	Phone: E-mail: lori.conlonkhan@boiseschools.org 5-Year Term Expires: October 31, 2020
Idaho Public School Administrator **Dana Bradley** Cassia County School District 237 E. 19th St. Burley, ID 83318	Phone: 208-878-6627 E-mail: bradana@sd151.k12.id.us 5-Year Term Expires: June 30, 2016
Idaho Public School Elementary Classroom Teacher **Heidi Fry** Siena K8 Magnet School 2870 E. Rome Dr. Meridian, ID 83642	Phone: 208-350-4370 E-mail: fry.heide@meridianschools.org 5-Year Term Expires: May 31, 2019
Idaho Public School Elementary Classroom Teacher **Donna Wommack** Genesee Joint School District #282 330 W. Ash Ave. Genesee, ID 83832	Phone: 208-285-1161 E-mail: dwommack@sd282.org 5-Year Term Expires: May 31, 2019
Idaho Public School Elementary Classroom Teacher **Stacey Jensen** Edahow Elementary School 2020 Pocatello Creek Road Pocatello, ID 83201	Phone: 208-233-1844 E-mail: jensenst@d25.k12.id.us 5-Year Term Expires: June 30, 2021
Idaho Public School Elementary Classroom Teacher **Catherine Griffin** Heritage Community Charter Special Education Director 1803 E Ustick Rd. Caldwell, ID 83605	Phone: 208-453-8070 E-mail: cgriffin@heritagecommunitycharter.com 5-Year Term Expires: October 31, 2020
Idaho Public School Elementary Classroom Teacher **Tauna Johnson** Genesee Elementary School 330 W Ash Ave. Genesee, ID 83832	Phone: 208-285-1162 E-mail: tjohnson@sd282.org 5-Year Term Expires: October 31, 2020
Idaho Public School Elementary Classroom Teacher **Zoe Jorgensen** Idaho Falls School District Bush Elementary Magnet School	Phone: 208-525-7602 E-mail: jorgzoe@d91.k12.id.us 5-Year Term Expires: October 31, 2020
Idaho Public School Elementary Classroom Teacher **Sharon Tennent** Boise Independent School District Math Coach	Phone: E-mail: sharon.tennent@boiseschools.org 5-Year Term Expires: October 31, 2020
Idaho Public School Secondary Classroom Teacher **Lisa Olsen**	Phone: 208-525-4403

Rocky Mountain Middle School 3443 N. Ammon Rd. Idaho Falls, ID 83401	E-mail: olsenl@d93.k12.id.us 5-Year Term Expires: May 31, 2019
Idaho Public School Secondary Classroom Teacher **Rebecca Parrill** Lewiston Independent School District No. 1 3317 12th Street Lewiston, ID 83501	Phone: 208-748-3000 E-mail: rparrill@lewistonschools.net 5-Year Term Expires: May 31, 2019
Idaho Public School Secondary Classroom Teacher **Kristie Scott** West Jefferson High School 1260 E. 1500 N Terreton, ID 83450	Phone: 208-663-4391 E-mail: scottk@wjsd.org 5-Year Term Expires: May 31, 2019
Idaho Public School Secondary Classroom Teacher **Chris Wadley** Whitepine Joint School District Deary Jr/Sr High School 502 First Ave. , PO Box 9 Deary, ID 83823	Phone: 208-877-1151 E-mail: cwadley@sd288.k12.id.us 5-Year Term Expires: May 31, 2019
Idaho Public School Secondary Classroom Teacher **Melyssa Ferro** Caldwell School District Syringa Middle School 1100 Willow St. Caldwell, ID 83605	Phone: 208-455-3305 E-mail: Mferro@caldwellschools.org 5-Year Term Expires: October 31, 2020
Representative **Darlene Matson Dyer** PO Box 1981 Hailey, ID 83333	Phone: 208-788-4318 E-mail: ddyer331@gmail.com 5-Year Term Expires: June 30, 2021
Representative **Laree Jansen** 3669 North 3200 East Kimberly, ID 83341-5344	Phone: 208-733-1168 E-mail: lareej@cableone.net 5-Year Term Expires: June 30, 2021

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2016 Curricular Materials and Online Resources Recommendations

Curricular Materials Recommendations - Annual Adoption

It was moved by Darlene Dyer, seconded by Lisa Olsen, and carried that the curricular materials listed and marked as approved in the Subject Area Review Books for the *Annual Adoption* of Computer Applications materials and their accompanying ancillary materials, notes, 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 Laree Jansen, seconded by a Unanimous Vote, and carried to adjourn the meeting on June 17, 2016.

Respectfully submitted,

Elizabeth Flasnick
Executive Secretary

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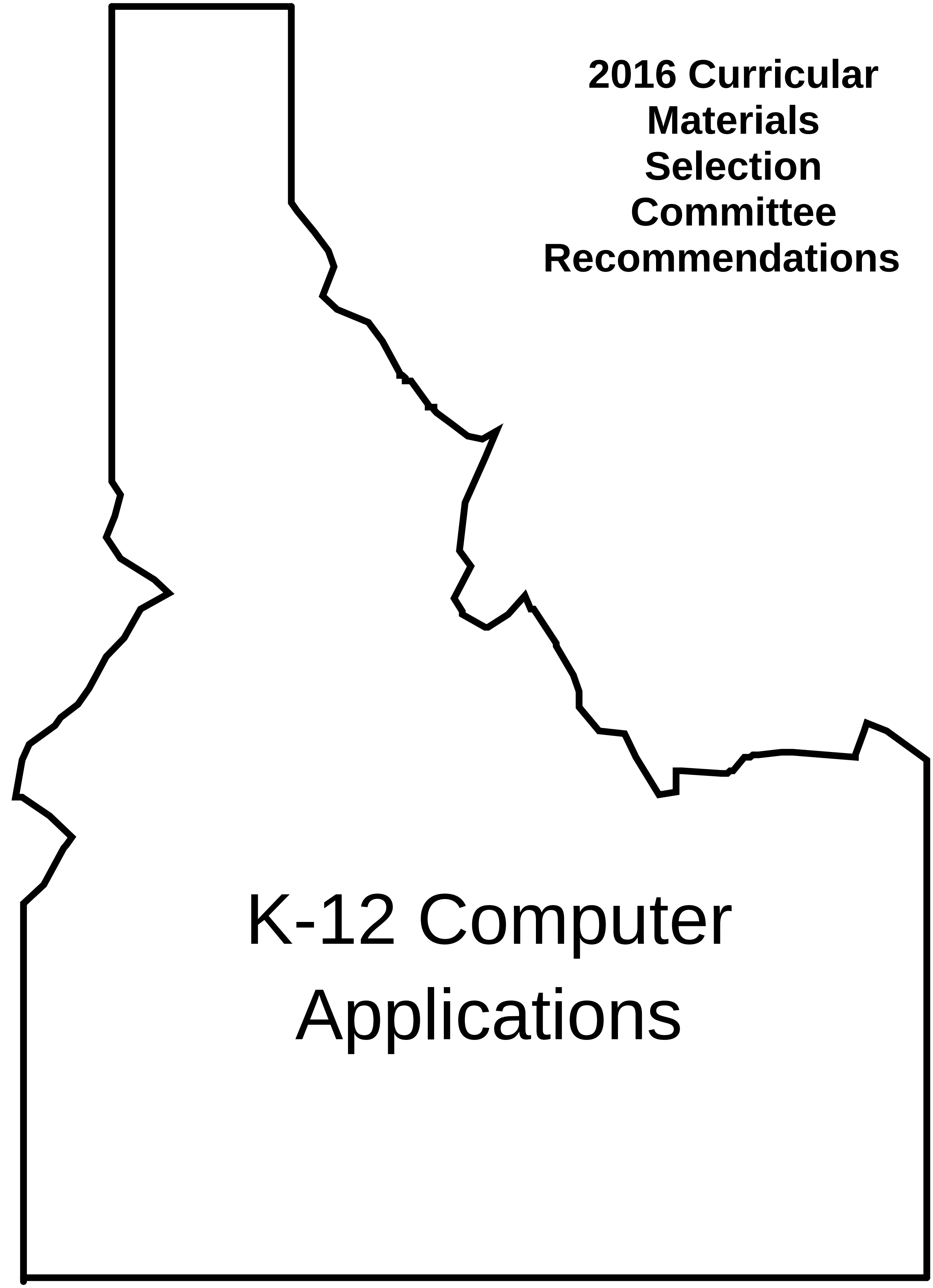

2016 Curricular Materials Selection Committee Recommendations

K-12 Computer Applications

Classifications of Curricular Materials:

Core Program- a complete stand-alone program which meets the focus, coherence and rigor of the Idaho Information and Communication Technology Content Standards, with minimal or no need for supplemental materials. *Substantial evidence clearly supports the designation of this program as Core.*

Other Program- a program that substantially, but partially, meets the focus, coherence and rigor of the Idaho Information and Communication Technology Content Standards, with some need for supplemental materials. *Substantial evidence clearly supports the designation of this program as Other.*

Component Program- a program designed and intended to be used with another program. This program supports and/or enhances the focus, coherence and rigor of Core and Other Programs. *Substantial evidence clearly supports the designation of this program as Component.*

Intervention Program- a program designed and intended to target and support students' specific needs. *Substantial evidence clearly supports the designation of this program as Intervention.*

Publisher	Title of Material	Author	Copyright	Grade Level	ISBN	Recommendation
Cengage Learning, Inc.	**Microsoft® Office 365 & Office 2016 : Introductory**	**Vermaat**	**2017**	**9-12**	**9781305870031**	**Other**
	Notes: **STRENGTHS:** Hardback, large spiral bound construction, Color helps to separate book into program areas. Up to date operating system incorporated in book, step-by-step instruction supported. Incorporated application usage for portable devices, graphic images that support call outs, shows on screen images that support student progress. Large print able to be seen by those with possible visual limitations. End of chapter projects support skills learned in chapter, and creativity in students. **WEAKNESSES:** No evidence of interaction with peers, experts, or others employing the digital media or environment. It does state how the material can be utilized in support of groups. No group projects present. Could not find areas of group activities in book. **OTHER:** Suggestion to publisher, tabs at section ends would allow students quick access to subject areas. Publisher should allow free access to graphics that are utilized within the textbook.					
	Key Features: • OFFERS UNIQUE EMPHASIS ON THE REASONING BEHIND EACH PROCESS. Students go well beyond simply following instructions to accomplish each task. They explore context for their complete projects as they learn the “why” behind each step in the process. • ROADMAPS FOR EACH MODULE DETAIL PROGRESS. Helpful Roadmaps within each module visually show students where they are in the process of completing the module project. • CONTENT EMPHASIZES CRITICAL THINKING SKILLS. Opportunities to refine critical thinking appear throughout the text within “Consider This” sections, thought-provoking questions, and problem-solving activities. Numerous end-of-module activities engage students in critical thinking and problem-solving skills as they learn to create their own solutions. • ENCOURAGES PERSONALIZATION. This edition asks students to incorporate personal detail in their solutions for every module project and assignment to ensure that each student’s solution will be unique. **New Features for this edtion:** • NEW WORD MODULE INTRODUCES THE LATEST STRENGTHS OF WORD 2016. This edition provides new hands-on module projects and effective introductions to the important features new to Word 2016, including Smart Lookup button and Insights task pane. • NEW POWERPOINT® MODULE HIGHLIGHTS THE MOST IMPORTANT FEATURES IN THE LATEST VERSION. Your students work with new projects and exercises that emphasize the topics that are most relevant in their lives. This edition expands explanation of usage of inserting and formatting shapes. • NEW EXCEL MODULE EMPHASIZES PRATICAL USES FOR NEW FEATURES. An updated project teaches students how to create a personal budget. It also addresses chart types and functions that are new to Excel 2016. • NEW PRODUCTIVITY APPS FOR WORK AND SCHOOL MODULE PROVIDE A VISUAL INTRODUCTION. These helpful, easy-to-use apps by author Corinne Hoisington visually guide students through using Microsoft® OneNote, Sway, Office Mix and Edge. Fun, hands-on activities ensure active learning. Companion Sways provide videos and step-by-step instructions to help students learn to master each app.					
	Microsoft® Office 365 & Office 2016 : Introductory, MindTap 1 year instant access code	Vermaat	2017	9-12	9781337100663	
	Microsoft® Office 365 & Office 2016 : Introductory, Instructor’s Website	Vermaat	2017	9-12	9781305870413	
	Microsoft® Office 365 & Office 2016 : Introductory, Cengage Learning Testing, powered by Cognero Instant Access	Vermaat	2017	9-12	9781305881518	
Publisher	**Title of Material**	**Author**	**Copyright**	**Grade Level**	**ISBN**	**Recommendation**
Cengage Learning, Inc.	**Illustrated Microsoft® Office 365 & Office 2016 : Introductory**	**Beskeen/Cram/ Duffy/Friedrichsen/Reding**	**2017**	**9-12**	**9781305876033**	**Component**

Publisher	Title of Material	Author	Copyright	Grade Level	ISBN	Recommendation
	Notes: **STRENGTHS:** There are great illustrations and formatting throughout the text. There is a lot of material put together in a very clear way. **WEAKNESSES:** There are 2 main points of weakness. The first is that there are no summative assessments and the second are the lack of the following standards: 1.1.3, 2.1.2, 3.1.1, 3.1.3, and 4.1.1. **OTHER:** Online resources are at the back of the book and hard to find.					
	Key Features: • COMPREHENSIVE UPDATES REFLECT THE LATEST FEATURES AND ENHANCEMENTS THROUGHOUT MICROSOFT® OFFICE 2016. Your students gain a solid understanding of the very latest Microsoft® Office skills to apply to work or school assignments. • CONCISE, TO-THE-POINT INSTRUCTION HELPS STUDENTS OF ALL LEVELS MASTER ESSENTIAL SKILLS. This edition's direct, proven instructional approach teaches how to use Microsoft® Office 2016 -- including Word, Excel, Access, and PowerPoint®. Students also learn to master skills in Windows® 10 and Outlook and better understand essential computer concepts. A featured updated case study in each module engages learners with real-world situations to demonstrate how to apply their skills while learning the software. • UNIQUE TWO-PAGE SPREAD PRESENTS AN ENTIRE TASK IN A SINGLE VIEW. This proven, focused visual approach keeps learners of all levels engaged and actively learning important MS Office 2016 skills. • "QUICK TIPS" AND "TROUBLES" HELP STUDENTS AVOID TYPICAL ERRORS AND PITFALLS. This edition highlights common mistakes and cautions readers with special features and helpful warnings within the step-by-step directions for each lesson. • PRACTICE EXERCISES EMPHASIZE THE RELEVANCE OF CONCEPTS. Independent Challenges and Visual Workshops at the end of each module help learners become adept with their MS Office 2016 skills. • SERVES AS AN INVALUABLE REFERENCE RESOURCE NOW AND IN FUTURE CAREERS. The clear presentation and easily accessible information throughout this edition makes it a resource students will frequently reference both during and after your course. **New Features for this edition:** • NEW PRODUCTIVITY APPS FOR WORK AND SCHOOL MODULE PROVIDES A VISUAL INTRODUCTION. These helpful, easy-to-use apps by well-known technology author Corinne Hoisington visually guide students through using Microsoft® OneNote, Sway, Office Mix and Edge. Companion Sways provide videos and step-by-step instructions to help students learn to master each app.					
	Illustrated Microsoft® Office 365 & Office 2016 : Introductory, MindTap 1 year instant access code	Beskeen/Cram/ Duffy/Friedrichsen/Reding	2017	9-12	9781337104975	
	Illustrated Microsoft® Office 365 & Office 2016 : Introductory, Instructor's Web Site	Beskeen/Cram/ Duffy/Friedrichsen/Reding	2017	9-12	9781305876095	
	Illustrated Microsoft® Office 365 & Office 2016 : Introductory, Cengage Learning Testing, powered by Cognero Instant Access	Beskeen/Cram/ Duffy/Friedrichsen/Reding	2017	9-12	9781305881549	
Publisher	**Title of Material**	**Author**	**Copyright**	**Grade Level**	**ISBN**	**Recommendation**
Cengage Learning, Inc.	**New Perspectives Computer Concepts 2016 Enhanced, Introductory**	**Carey/DesJardins/Shaffer/Shellman/Vodnik**	**2017**	**9-12**	**9781305656291**	**Core**
	Notes: **STRENGTHS:** The Computer Concepts 2016 book is a great resources for teachers to introduce students to Introductory Computer Concepts. The information is not overly complicated, but filled with valuable real world information. **WEAKNESSES:** 1. Cross curricular connections 2. No ELL support 3. Summative assessments					

Key Features:

- PROVIDES COMPLETE INTRODUCTION TO TODAY'S SPECTRUM OF OPERATING SYSTEMS. This edition offers thorough coverage and examples of the latest MS Windows, Mac OS X, iOS, Android and Chrome OS throughout the book. Your students leave your course with a basic understanding of how to maximize the critical applications in today's leading operating systems.
- QUICKCHECK EXERCISES HELP STUDENTS GAUGE COMPREHENSION. Located in each section, these QuickCheck Exercises ensure your students fully understand the concepts they have just read before they progress further.
- END-OF-UNIT READINGS HIGHLIGHT SOCIAL AND ETHICAL ISSUES. These readings provide material for thought-provoking classroom discussions. Accompanying Try It! and What Do You Think? exercises encourage students to think critically about the topics.
- END-OF-UNIT ACTIVITIES REINFORCE CONCEPTS WITH MEANINGFUL PRACTICE. Interactive Summary Questions, Interactive Situation Questions, and Lab Projects enable students to practice the specific skills covered in each chapter with practical, hands-on applications.
- STUDENTS PRACTICE INFORMATION LITERACY SKILLS USING ONLINE TOOLS. A section in each unit guides students in refining their skills in searching, selecting, organizing, evaluating, and citing source material. When you add Search Expert to your course, you further help your students acquire skills and tools they can apply to research across any curriculum.

New features for this edition:

- TRY IT! PROGRAMMING WITH PYTHON™ OFFERS HANDS-ON EXPERIENCE TO USERS. This new unit provides a step-by-step, hands-on, introduction to programming. By following step-by-step instructions, student learn to program successfully and immediately-- even if they have no prior experience.
- UPDATED SCREENS THROUGHOUT REFLECT THE LATEST OPERATING SYSTEMS AND APPLICATIONS. New visuals incorporate the latest features of Microsoft® Windows 10 and Office 2016 to ensure that your students are prepared to work with the most current versions of these important tools.

	New Perspectives Computer Concepts 2016 Enhanced, Introductory, MindTap 1 year instant access code	Carey/DesJardins/Shaffer/Shellman/Vodnik	2017	9-12	9781305946408	
	New Perspectives Computer Concepts 2016 Enhanced, Introductory, Instructor's Website	Carey/DesJardins/Shaffer/Shellman/Vodnik	2017	9-12	9781305656338	
	New Perspectives Computer Concepts 2016 Enhanced, Introductory, Cengage Learning Testing, powered by Cognero Instant Access	Carey/DesJardins/Shaffer/Shellman/Vodnik	2017	9-12	9781305656376	

Publisher	Title of Material	Author	Copyright	Grade Level	ISBN	Recommendation
Cengage Learning, Inc.	**Shelly Cashman Discovering Computers & Microsoft® Office 365 & Office 2016 : A Fundamental Combined Approach**	**Vermaat/Campbell/Freund/Frydenberg/Last/Pratt/Sebok**	**2017**	**9-12**	**9781305871809**	**Other**

Notes:
STRENGTHS:
Discovering Computers is a well laid out approach to fundamental computers. We especially liked the introduction chapters discussing basic computer information and evolution. We like the assessments in "Test the Student's Knowledge." Critical thinking is encouraged. We also like the collaboration options at the end of most modules.
WEAKNESSES:
We thought the design was good but could be made easier for the ESL student. There is an overwhelming amount of text on some pages. Although the graphics are relevant it does not show step by step with pictures that could help ESL students who struggle with reading English. The design is a little cluttered.
OTHER:
This textbook meets all standards and criteria for Idaho. We recommend it for district purchase.

Key Features:

- STEP-BY-STEP PRESENTATIONS AND CLEAR SCREEN IMAGES GUIDE STUDENTS. This book's proven step-by-step pedagogy and enhanced callouts within screenshots provide students with guidance each step of the way, helping them master even the most challenging Office 2016 skills. The book's unique project-based approach engages students in learning skills within a real-world context.
- COMBINES COMPLETE COMPUTER CONCEPTS WITH THE LATEST MICROSOFT ® OFFICE 2016 SKILLS. The authors skillfully integrate fully updated computer concepts content with the latest new Microsoft® Office 2016 skills in a single, convenient text. All of this timely information is reinforced with the proven Shelly Cashman hallmark pedagogy.
- EACH MODULE ADDRESSES PRATICAL SKILLS AND TIMELY SECURITY ISSUES RELATED TO CONTENT. As students progress through each module's topics, they examine the practical technology skills and relevant security issues pertinent to the featured subject matter.
- MEANINGFUL QUESTIONS AND ACTIVITIES STRENGTHEN CRITICAL THINKING SKILLS. Students have numerous opportunities throughout the text to refine their critical thinking abilities as they answer thought-provoking questions, complete problem-solving activities within the module, and review end of module activities and assignments.

New to this edition:

- COMPUTER CONCEPTS HIGHLIGHT THE MOST RECENT DEVELOPMENTS IN COMPUTER TOOLS AND TECHNOLOGY. The latest computer concepts, drawn from the best-selling DISCOVERING COMPUTERS, emphasize actionable content, a proven learning structure, and variety of practice and opportunities to reinforce key skills.
- NEW WORD MODULE INTRODUCES THE LATEST STRENGTHS OF MICROSOFT® WORD 2016. This edition provides new hands-on module projects and effective introductions to the key features new to Word 2016, including Smart Lookup button and Insights task pane.
- NEW POWERPOINT® MODULE HIGHLIGHTS THE MOST IMPORTANT FEATURES IN THE LATEST VERSION. Your students work with new projects and exercises that emphasize the topics that are most relevant in their lives. This edition further explains how to best use new inserting and formatting shapes features.
- NEW EXCEL MODULE EMPHASIZES PRATICAL USES FOR NEW FEATURES. An updated, useful project teaches students how to create a personal budget. It also addresses chart types and functions that are new to Excel 2016.
- NEW ACCESS MODULE PROVIDES VALUABLE HANDS-ON PRACTICE. Students work with a new database project that models the real world of a human resources outsourcing company. Students learn to use new query, report and form examples from Access 2016.
- NEW PRODUCTIVITY APPS FOR WORK AND SCHOOL MODULE PROVIDES A VISUAL INTRODUCTION. These helpful, easy-to-use apps by well-known technology author Corinne Hoisington visually guide students through using Microsoft® OneNote, Sway, Office Mix and Edge, using fun, hands-on activities for active learning. Companion Sways provide videos and step-by-step instructions to help students learn to master each app.

	Shelly Cashman Discovering Computers & Microsoft® Office 365 & Office 2016 : A Fundamental Combined Approach, MindTap 1 year instant access code	Vermaat/Campbell/Freund/Frydenberg/Last/Pratt/Sebok	2017	9-12	9781305875951	
	Shelly Cashman Discovering Computers & Microsoft® Office 365 & Office 2016 : A Fundamental Combined Approach, Instructor's Web Site	Vermaat/Campbell/Freund/Frydenberg/Last/Pratt/Sebok	2017	9-12	9781305871816	
	Shelly Cashman Discovering Computers & Microsoft® Office 365 & Office 2016 : A Fundamental Combined Approach, Cengage Learning Testing Powered by Cognero® Instant Access	Vermaat/Campbell/Freund/Frydenberg/Last/Pratt/Sebok	2017	9-12	9781305871939	

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<tr><th>Publisher</th><th>Title of Material</th><th>Author</th><th>Copyright</th><th>Grade Level</th><th>ISBN</th><th>Recommendation</th></tr>
<tr><td rowspan="6">Cengage Learning, Inc.</td><td>Illustrated Computer Concepts and Microsoft® Office 365 & Office 2016</td><td>Parsons/Beskeen/Cram/Duffy/Friedrichsen/Reding</td><td>2017</td><td>9-12</td><td>9781305879041</td><td rowspan="6">Component</td></tr>
<tr><td colspan="5">Notes:
STRENGTHS:
We like the design and organization of the book. It incorporates some very good assessment and critical thinking exercises. The spiral binding makes is convenient and easy to use. The graphics are good and the text not overwhelming. The organization is conducive to learning with ease and engagement.
WEAKNESSES:
Unfortunately, this book does not meet all the state standards required. This book needs to address collaboration and incorporate some etiquette with ethics and responsible use.
OTHER:
We like the book as far as it meets the standards, ease, design, and organization. However, we cannot recommend it as core/other because it falls short on standards necessary for Idaho. It would be a great component text. The publisher submitted this text for grades 9-12 but it would also be appropriate for grades 7-8.</td></tr>
<tr><td colspan="5">Key Features:
• UNIQUE ALL-IN-ONE SOLUTION TEACHES BOTH MICROSOFT® OFFICE 2016 SKILLS AND IMPORTANT COMPUTER CONCEPTS. This book uses the proven Illustrated Series approach to emphasize both the latest Microsoft® Office 2016 skills as well as today’s most important computer concepts. Enhanced technology resources correspond with this edition to help you reinforce students’ abilities.
• DETAILED LESSONS HIGHLIGHT TODAY’S MOST IMPORTANT COMPUTER CONCEPTS AND THE NEWEST TRENDS IN TECHNOLOGY AND TODAY’S DIGITAL WORLD. Your students learn skills that reflect today’s most progressive computer developments while gaining a thorough introduction to Microsoft® Office 2016.
• EASY-TO-FOLLOW AND EASY-TO-ABSORB TWO-PAGE LESSONS APPEAL TO A WIDE VARIETY OF LEARNING STYLES. This proven, focused visual approach offers a single lesson on two adjoining pages, making an entire task visible in a single view. The intriguing, concise presentation keeps learners of all levels engaged and actively learning important Microsoft® Office skills.
• EXTENSIVE END-OF-MODULE ACTIVITIES PROVIDE HANDS-ON PRACTICE. Proven, practical exercises help learners become adept in their new Microsoft® Office 2016 skills while reinforcing the conceptual material from each chapter.
New to this edition:
• NEW PRODUCTIVITY APPS FOR WORK AND SCHOOL MODULE PROVIDE A VISUAL INTRODUCTION. These helpful, easy-to-use apps by well-known technology author Corinne Hoisington visually guide students through using Microsoft® OneNote, Sway, Office Mix and Edge. Companion Sways provide videos and step-by-step instructions to help students learn to master each app.
• UPDATED CASE STUDY EMPHASIZES APPLICATIONS OF OFFICE SKILLS. The contemporary Case Study woven throughout this edition introduces Microsoft® Office 2016 topics and advantages to learners using memorable real world examples.
• UPDATED COMPUTER CONCEPTS MODULES HIGHLIGHT THE LATEST NEW TECHNOLOGIES. This edition introduces the most relevant and essential information about computers and technology in today’s digital world.</td></tr>
<tr><td>Illustrated Computer Concepts and Microsoft® Office 365 & Office 2016, MindTap 1 year instant access code</td><td>Parsons/Beskeen/Cram/Duffy/Friedrichsen/Reding</td><td>2017</td><td>9-12</td><td>9781305879157</td></tr>
<tr><td>Illustrated Computer Concepts and Microsoft® Office 365 & Office 2016, Instructor’s Web Site</td><td>Parsons/Beskeen/Cram/Duffy/Friedrichsen/Reding</td><td>2017</td><td>9-12</td><td>9781305879058</td></tr>
<tr><td>Illustrated Computer Concepts and Microsoft® Office 365 & Office 2016, Cengage Learning Testing, powered by Cognero® Instant Access</td><td>Parsons/Beskeen/Cram/Duffy/Friedrichsen/Reding</td><td>2017</td><td>9-12</td><td>9781305879072</td></tr>
</table>

Publisher	Title of Material	Author	Copyright	Grade Level	ISBN	Recommendation
Pearson Prentice Hall	**Learning Microsoft Office 2013 Level 1 Deluxe Edition, Student Edition with eText (six, 1 year access codes)**	**Mehaffie**	**2014**	**9-12**	**9781269305587**	**Other**
	Notes: **STRENGTHS:** Well organized with multiple exercises to validate learning. Meets 13 of 15 standards. Application of knowledge and critical thinking at the end of each chapter. Data is sequential so you build on previous learning objectives. Applies additional concepts within each application. **WEAKNESSES:** Not current offering from Microsoft (2016). Little to know information about collaborating with others on group projects. Little to no mention of teaching to various learning styles/abilities.					
	Key Features: Learning Microsoft Office, Level 1, Print Student Edition with eText The most-effective program available for teaching computer application skills—available in print or online! Proven pedagogy builds skills through application and repetition. • Features hands-on exercises that teach software applications while reinforcing business skills, college and career readiness skills, and computer literacy concepts. • Helps students master software concepts and skills through a series of progressively challenging, real-world scenarios. • Engages students with numerous projects and activities. • Covers Microsoft Office Specialist (Core) Objectives. • Exclusive Teacher Resources includes a Teacher's Wraparound Edition with differentiated instruction plans.					
	Learning Microsoft Office 2013 Level 1 Deluxe Edition, Student Edition with eCourse (6 year access)	Mehaffie	2014	9-12	9781269393119	
	Learning Microsoft Office 2013 Level 1 Deluxe Edition, Student Edition (hardcover spiral)	Mehaffie	2014	9-12	9780133149531	
	Learning Microsoft Office 2013 Level 1 Deluxe Edition, Teacher's Wraparound Edition with CD-ROM	Mehaffie	2014	9-12	9780133405101	
	Learning Microsoft Office 2013 Level 1 Deluxe Edition, Solutions Book with CD-ROM	Mehaffie	2014	9-12	9780133390421	
	Learning Microsoft Office 2013 Level 1 Deluxe Edition, Visual Aid CD-ROM	Mehaffie	2014	9-12	9780133405255	
	Learning Microsoft Office 2013 Level 1 Deluxe Edition, Test Book with TestGen CD-ROM	Mehaffie	2014	9-12	9780133414943	
	Learning Microsoft Office 2013 Level 1 Deluxe Edition, eCourse Teacher Access	Mehaffie	2014	9-12	9781269394642	
Publisher	**Title of Material**	**Author**	**Copyright**	**Grade Level**	**ISBN**	**Recommendation**
Pearson Prentice Hall	**Learning Microsoft Office 2013 Level 2, Student Edition with eText (six, 1 year access codes)**	**Mehaffie**	**2014**	**9-12**	**9781269305600**	**Core**
	Notes: **STRENGTHS:**					

	Well organized with multiple exercises to validate learning. Includes advanced learning. Meets 15 of 15 standards. Application of knowledge and critical thinking at the end of each chapter. Data is sequential so you build on previous learning objectives. Applies additional concepts within each application. **WEAKNESSES:** Not current offering from Microsoft (2016). Little to no mention of teaching to various learning styles/abilities. ESL not evident.					
	Key Features: Learning Microsoft Office, Level 2, Print Student Edition with eText The most-effective program available for teaching computer application skills—available in print or online! Proven pedagogy builds skills through application and repetition. • Features hands-on exercises that teach software applications while reinforcing business skills, college and career readiness skills, and computer literacy concepts. • Helps students master software concepts and skills through a series of progressively challenging, real-world scenarios. • Engages students with numerous projects and activities. • Covers Microsoft Office Specialist Expert Objectives. • Exclusive Teacher Resources includes a Teacher's Wraparound Edition with differentiated instruction plans.					
	Learning Microsoft Office 2013 Level 2, Student Edition with eCourse (6 year access)	Mehaffie	2014	9-12	9781269393126	
	Learning Microsoft Office 2013 Level 2, Student Edition (spiralbound)	Mehaffie	2014	9-12	9780133407815	
	Learning Microsoft Office 2013 Level 2, Teacher's Manual with CD-ROM	Mehaffie	2014	9-12	9780133148886	
	Learning Microsoft Office 2013 Level 2, Test Book with TestGen CD-ROM	Mehaffie	2014	9-12	9780133148879	
	Learning Microsoft Office 2013 Level 2, Solutions Book with CD-ROM	Mehaffie	2014	9-12	9780133148909	
	Learning Microsoft Office 2013 Level 2, Visual Aid CD-ROM	Mehaffie	2014	9-12	9780133149180	
	Learning Microsoft Office 2013 Level 2, eCourse Teacher Access	Mehaffie	2014	9-12	9781269396592	
Publisher	**Title of Material**	**Author**	**Copyright**	**Grade Level**	**ISBN**	**Recommendation**
Pearson Prentice Hall	**Introduction to Computers and Information Technology, Student Edition (NASTA)**	**Emergent Learning**	**2016**	**9-12**	**9781323144183**	**Other**
	Notes: **STRENGTHS:** Hardback construction. Varied text type. Bold colors. Presentation of multiple different media. Graphics are bold and associated with text of subject. Presents real-world application of knowledge. **WEAKNESSES:** Textbook language more geared to middle-school application then a high-school environment. Assignment text format is cramped and difficult to follow.					
	Key Features: *Introduction to Computers and Information Technology* helps students built a concrete understanding of how computers work and how various types of computing devices and accessories are used in school, work, and at home. The text consists of three sections: Computing Fundamentals, Applications, Communications and Networks. Covers all IC3, GS5, and Spark standards. Features include: • Keyboarding Essentials, a complete guide to keyboarding techniques including posture, ergonomics, and fingering. • Step-by-step procedures for Microsoft® Office 2013. • End-of-chapter exercises and review material to reinforce important topics and allow students to demonstrate their knowledge of the material. • Student Web site, including bonus activities and cross-curricular group projects, procedures for older					

	versions of Microsoft Office, puzzles, and data files. • A Web Page Development and Computer Programming appendix includes information on using HTML to create a Web page with both a text editor and a graphical user interface (GUI) editor, and some basic processes for designing a computer program.					
	Introduction to Computers and Information Technology, Standalone eText (1 year access code)		2016	9-12	9781323188255	
	Introduction to Computers and Information Technology, Teacher's Manual		2016	9-12	9781323237076	
	Introduction to Computers and Information Technology, Student Workbook		2016	9-12	9781323237120	
Publisher	**Title of Material**	**Author**	**Copyright**	**Grade Level**	**ISBN**	**Recommendation**
Pearson Prentice Hall	**Learning Microsoft Word 2013, Student Edition with eText (six 1 year access codes)**	**Mehaffie**	**2014**	**9-12**	**9781269305563**	**Core**
	Notes: **STRENGTHS:** Logically structured. Incorporated additional digital media. **WEAKNESSES:** Limited in its information. Presents information on AUP (acceptable use policy), minimal information on plagiarism. Documentation appears crowded and unappealing. Does not support call outs, presents limited samples of documents students are working on.					
	Key Features: Learning Microsoft Word 2013, Print Student Edition with eText The most-effective program available for teaching computer application skills—available in print or online! Proven pedagogy builds skills through application and repetition. • Features hands-on exercises that teach software applications while reinforcing business skills, college and career readiness skills, and computer literacy concepts. • Helps students master software concepts and skills through a series of progressively challenging, real-world scenarios. • Engages students with numerous projects and activities. • Covers Microsoft Office Specialist (Core and Expert) Objectives.					
	Learning Microsoft Word 2013, Student Edition with eCourse 6-year access)	Mehaffie	2014	9-12	9781269393133	
	Learning Microsoft Word 2013, Student Edition (spiralbound with CD-ROM)	Mehaffie	2014	9-12	9780133149098	
	Learning Microsoft Word 2013, Teacher's Manual with CD-ROM	Mehaffie	2014	9-12	9780133149326	
	Learning Microsoft Word 2013, Test Book with CD-ROM	Mehaffie	2014	9-12	9780133149302	
	Learning Microsoft Word 2013, Solutions Book with CD-ROM	Mehaffie	2014	9-12	9780133348965	
	Learning Microsoft Word 2013, eCourse Teacher Access	Mehaffie	2014	9-12	9781269395762	
Publisher	**Title of Material**	**Author**	**Copyright**	**Grade Level**	**ISBN**	**Recommendation**
Pearson Prentice Hall	**Learning Microsoft Excel 2013, Student Edition with eText (six, 1 year access codes)**	**Mehaffie**	**2014**	**9-12**	**9781269305549**	**Other**
	Notes: **STRENGTHS:** Text is structured to lead students through specific lesson tasks and then End of Chapter activities allow students to creatively demonstrate their understanding of the content in via projects. **WEAKNESSES:** Proper use of citations was not addressed in this text. No original works were created by students. This text had limited collaboration with others explicitly written into the text.					

	Key Features: Learning Microsoft Excel 2013, Print Student Edition with eText The most-effective program available for teaching computer application skills—available in print or online! Proven pedagogy builds skills through application and repetition. • Features hands-on exercises that teach software applications while reinforcing business skills, college and career readiness skills, and computer literacy concepts. • Helps students master software concepts and skills through a series of progressively challenging, real-world scenarios. • Engages students with numerous projects and activities. • Covers Microsoft Office Specialist (Core and Expert) Objectives.					
	Learning Microsoft Excel 2013, Student Edition with eCourse (6 year access)	Mehaffie	2014	9-12	9781269393140	
	Learning Microsoft Excel 2013, Student Edition (spiralbound with CD-ROM)	Mehaffie	2014	9-12	9780133149104	
	Learning Microsoft Excel 2013, Teacher's Manual with CD-ROM	Mehaffie	2014	9-12	9780133348989	
	Learning Microsoft Excel 2013, Test Book with CD-ROM	Mehaffie	2014	9-12	9780133149395	
	Learning Microsoft Excel 2013, Solutions Book with CD-ROM	Mehaffie	2014	9-12	9780133149401	
	Learning Microsoft Excel 2013, eCourse Teacher Access	Mehaffie	2014	9-12	9781269395120	
Publisher	**Title of Material**	**Author**	**Copyright**	**Grade Level**	**ISBN**	**Recommendation**
Pearson Prentice Hall	**Learning Microsoft PowerPoint 2013, Student Edition with eText (six, 1 year access codes)**	**Mehaffie**	**2014**	**9-12**	**9781269305433**	**Core**
	Notes: **STRENGTHS:** Text is structured to lead students through specific lesson tasks and then End of Chapter activities allow students to creatively demonstrate their understanding of the content in via projects. **WEAKNESSES:** No significant weaknesses noticed.					
	Key Features: Learning Microsoft PowerPoint 2013, Print Student Edition with eText The most-effective program available for teaching computer application skills—available in print or online! Proven pedagogy builds skills through application and repetition. • Features hands-on exercises that teach software applications while reinforcing business skills, college and career readiness skills, and computer literacy concepts. • Helps students master software concepts and skills through a series of progressively challenging, real-world scenarios. • Engages students with numerous projects and activities.					
	Learning Microsoft PowerPoint 2013, Student Edition with eCourse (6 year access)	Mehaffie	2014	9-12	9781269393157	
	Learning Microsoft PowerPoint 2013, Student Edition (spiralbound with CD-ROM)	Mehaffie	2014	9-12	9780133148619	
	Learning Microsoft PowerPoint 2013, Teacher's Manual with CD-ROM	Mehaffie	2014	9-12	9780133349009	
	Learning Microsoft PowerPoint 2013, Test Book with CD-ROM	Mehaffie	2014	9-12	9780133149487	
	Learning Microsoft PowerPoint 2013, Solutions Book with CD-ROM	Mehaffie	2014	9-12	9780133348996	
	Learning Microsoft PowerPoint 2013, eCourse Teacher Access	Mehaffie	2014	9-12	9781269396219	

Publisher	Title of Material	Author	Copyright	Grade Level	ISBN	Recommendation
Pearson Prentice Hall	**Learning Microsoft Access 2013, Student Edition with eText (six, 1 year access codes)**	**Mehaffie**	**2014**	**9-12**	**9781269306652**	**Component**
	Notes: **STRENGTHS:** The Learning Microsoft Access 2013 is very strong in its resources. It has the following: Teachers Manual, Student Edition, Test Book and Solutions Book. **WEAKNESSES:** The Text doesn't meet Standards 9-12.ICT.1.1.2, 9-12.ICT.1.1.3, 9-12.ICT.4.1.2.					
	Key Features: Learning Microsoft Access 2013, Print Student Edition with eText The most-effective program available for teaching computer application skills—available in print or online! Proven pedagogy builds skills through application and repetition. • Features hands-on exercises that teach software applications while reinforcing business skills, college and career readiness skills, and computer literacy concepts. • Helps students master software concepts and skills through a series of progressively challenging, real-world scenarios. • Engages students with numerous projects and activities.					
	Learning Microsoft Access 2013, Student Edition with eCourse (6 year access)	Mehaffie	2014	9-12	9781269393171	
	Learning Microsoft Access 2013, Student Edition (spiralbound with CD-ROM)	Mehaffie	2014	9-12	9781269456029	
	Learning Microsoft Access 2013, Teacher's Manual with CD-ROM	Mehaffie	2014	9-12	9781269456159	
	Learning Microsoft Access 2013, Test Book with CD-ROM	Mehaffie	2014	9-12	9781269456135	
	Learning Microsoft Access 2013, Solutions Book with CD-ROM	Mehaffie	2014	9-12	9781269456142	
	Learning Microsoft Access 2013, eCourse Teacher Access	Mehaffie	2014	9-12	9781269397049	

Publisher	Title of Material	Author	Copyright	Grade Level	ISBN	Recommendation
Pearson Prentice Hall	**Learning Microsoft Publisher 2013, Student Edition with eText (six, 1 year access codes)**	**Mehaffie**	**2014**	**9-12**	**9781269305419**	**Core**
	Notes: **STRENGTHS:** Text is structured to lead students through specific lesson tasks and then End of Chapter activities allow students to creatively demonstrate their understanding of the content in via projects. **WEAKNESSES:** This text had limited collaboration with others explicitly written into the text. More emphasis on proper citation would be beneficial.					
	Key Features: Learning Microsoft Publisher 2013, Print Student Edition with eText The most-effective program available for teaching computer application skills—available in print or online! Proven pedagogy builds skills through application and repetition. • Features hands-on exercises that teach software applications while reinforcing business skills, college and career readiness skills, and computer literacy concepts. • Helps students master software concepts and skills through a series of progressively challenging, real-world scenarios. • Engages students with numerous projects and activities.					
	Learning Microsoft Publisher 2013, Student Edition with eCourse (6 year access)	Mehaffie	2014	9-12	9781269393164	
	Learning Microsoft Publisher 2013, Student Edition	Mehaffie	2014	9-12	9780133148602	

	(spiralbound with CD-ROM)					
	Learning Microsoft Publisher 2013, Teacher's Manual with CD-ROM	Mehaffie	2014	9-12	9780133349030	
	Learning Microsoft Publisher 2013, Test Book with CD-ROM	Mehaffie	2014	9-12	9780133149111	
	Learning Microsoft Publisher 2013, Solutions Book with CD-ROM	Mehaffie	2014	9-12	9780133349023	
	Learning Microsoft Publisher 2013, eCourse Teacher Access	Mehaffie	2014	9-12	9781269396981	

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SUBJECT

Appointments to the Bias and Sensitivity Committee

REFERENCE

November 2014	Board appointed thirty (30) committee members for terms of either two (2) years or four (4) years. A list of ninety (90) members was appointed to do a one-time review. A list of sixty-three (63) alternates was also approved to replace one of the original thirty (30), if needed.
February 2015	Board approved to eliminate an audio clip and a test question from the ISAT assessments upon the recommendation from the Bias and Sensitivity Committee.

APPLICABLE STATUTE, RULE, OR POLICY

Section 33-134, Idaho Code - Assessment Item Review Committee

BACKGROUND/DISCUSSION

In accordance with Section 33-134, Idaho Code, the State Department of Education recommended and the State Board of Education appointed a review committee to ensure that parents, teachers, administrators, and school board members in Idaho's public education system have the opportunity to review the types and kinds of questions used on state assessments. The law requires a committee of thirty (30) individuals in each of the six (6) educational regions in the state. Each region is represented by two (2) parents, one (1) teacher, one (1) school board member, and one (1) public or charter school administrator. Committee members shall serve a term of four (4) years.

This committee is to review all summative computer adaptive test questions for bias and sensitivity. The committee is authorized to make recommendations to revise or eliminate computer adaptive test questions from the Idaho Standards Assessment Test in English Language Arts/Literacy and Mathematics.

In November 2015, the Department held a two-day meeting with the Bias and Sensitivity Committee to review 360 English language arts and mathematics items, of which several were recommended to be removed. Some individuals were asked to serve in place of Board-approved members unable to attend at the last moment. Because these individuals were not appointed by the Board as required, the committee's recommendations could not be forwarded to the Board for consideration.

The Department is recommending the approval of new members for the open positions on the committee. These individuals are listed in Attachment 2.

ATTACHMENTS

STAFF COMMENTS AND RECOMMENDATIONS

Pursuant to Section 33-134, Idaho Code, the Bias and Sensitivity Committee is charged with reviewing any new test items that have been added to any summative computer adaptive test, this includes the Idaho Standards Achievement Test for English Language Usage and Mathematics. Following the review process the committee may make recommendations to the Board for removal of any test questions that the committee determines may be bias or unfair to any group of test takes, regardless of differences in characteristics, including, but not limited to disability status, ethnic group, gender, regional background, native language or socioeconomic status.

While the initial appointments to the committee were for either a two or four year term, with ongoing appointments of four year terms, the Department found that many of the original committee members were either not available or not interested in participating in an additional round of assessment question reviews. In addition to new appointments for expired term or individuals who no longer wish to serve, the Department is requesting the Board appoint a list of alternate committee members that could be drawn from if the sitting committee member is unavailable for the review process in a given year, and still wants to serve on the committee. Seats for members that no longer wish to serve and resign from the committee during their term would still need to come to the Board for consideration of new appointments.

BOARD ACTION

I move to appoint the new members to the Bias and Sensitivity Committee as presented in Attachment 2.

Moved by __________ Seconded by __________ Carried Yes _____ No _____

I move to appoint the alternate members to the Bias and Sensitivity Committee, to serve during the review process for a given year if the appointed member representing the same group is unavailable to participate in the review during that year, as presented in Attachment 3.

Moved by __________ Seconded by __________ Carried Yes _____ No _____

2014 Board approved Bias and Sensitivity Committee Members

Region	Name	City	Role	Term Expiration
Region 1	Judy Novobielski-Muhs	St. Maries	Administrator	June 30, 2018
Region 1	Timothy Hunt	Hayden	Parent	June 30, 2016
Region 1	Lisa Hooper	Sandpoint	Parent	June 30, 2018
Region 1	Jared Hughes	Oldtown	Teacher	June 30, 2016
Region 1	Mindy Cameron	Sagle	Board	June 30, 2018
Region 2	Jim Doramus	Riggins	Administrator	June 30, 2016
Region 2	Brenda Riendeau	Moscow	Parent	June 30, 2018
Region 2	Cara Uhlenkott	Cottonwood	Parent	June 30, 2016
Region 2	Patty Hinkelman	Greencreek	Teacher	June 30, 2018
Region 2	Susan Rigg	Genesee	Board	June 30, 2016
Region 3	Craig Woods	Notus	Administrator	June 30, 2018
Region 3	Cindy Thorngren	Boise	Parent	June 30, 2016
Region 3	Darin Crisp	Kuna	Parent	June 30, 2018
Region 3	Julie Adams	Nampa	Teacher	June 30, 2016
Region 3	Sandra Dodson	Caldwell	Board	June 30, 2018
Region 4	Angela Davidson	Rupert	Administrator	June 30, 2016
Region 4	Gary Birch	Twin Falls	Parent	June 30, 2018
Region 4	Josi Christensen	Paul	Parent	June 30, 2016
Region 4	Douglas Pease	Twin Falls	Teacher	June 30, 2018
Region 4	Kathy Millar	Burley	Board	June 30, 2016
Region 5	Jan Harwood	Pocatello	Administrator	June 30, 2018
Region 5	Dustin Carter	Pingree	Parent	June 30, 2016
Region 5	Janean White	Pocatello	Parent	June 30, 2018
Region 5	Katrina Elliott	Blackfoot	Teacher	June 30, 2016
Region 5	Randall Armstrong	Inkom	Board	

Region 6	Landon LeFevre	Rexburg	Administrator	June 30, 2016
Region 6	Jennifer Piippo	Idaho Falls	Parent	June 30, 2018
Region 6	Theresa Adelizzi	Idaho Falls	Parent	June 30, 2016
Region 6	Becky Hitt	Rupert	Teacher	June 30, 2018
Region 6	Laila Kammerman	Idaho Falls	Board	June 30, 2016

Recommended New Bias and Sensitivity Committee Members

Region	Name	Role	Replacing/ Reappointment	Term Expiration
Region 1	Timothy Hunt	Parent	Reappointment	June 30, 2020
Region 1	Mary Lee Ruch	Teacher	Jared Hughes	June 30, 2020
Region 1	David Brinkman	School Board Member	Mindy Cameron	June 30, 2018
Region 2	Susan Rigg	Parent	Cara Uhlenkott	June 30, 2020
Region 2	Debra Steele	Teacher	Patty Hinkelman	June 30, 2018
Region 2	James Doramus	District Administrator	Reappointment	June 30, 2020
Region 2	John Menter	School Board Member	Susan Rigg	June 30, 2020
Region 3	Cindy Thorngren	Parent	Reappointment	June 30, 2020
Region 3	Tanya Koyle	Parent	Darin Crisp	June 30, 2018
Region 3	Marie Thomas	Teacher	Julie Adams	June 30, 2020
Region 3	Barb Skogsberg	School Board Member	Sandra Dodson	June 30, 2018
Region 4	Josi Christensen	Parent	Reappointment	June 30, 2020
Region 4	Barbara Dee Jones	Teacher	Douglas Pease	June 30, 2018
Region 4	Marcia Grabow	District Administrator	Angela Davidson	June 30, 2020
Region 4	Kathy Millar	School Board Member	Reappointment	June 30, 2020
Region 5	Kris Wilkinson	Parent	Dustin Carter	June 30, 2020
Region 5	Cindy Schneider	Parent	Janean White	June 30, 2018
Region 5	Teresa Jackman	Teacher	Katrina Elliot	June 30, 2020
Region 5	Kendra McMillan	District Administrator	Jan Harwood	June 30, 2018
Region 5	Dan Lau	School Board Member	Randall Armstrong	June 30, 2020
Region 6	Laura Wallis	Parent	Jennifer Piippo	June 30, 2018
Region 6	Joy McDaniel	Parent	Theresa Adelizzi	June 30, 2020
Region 6	Cindy Romney	Teacher	Becky Hitt	June 30, 2018
Region 6	Gail Rochelle	District Administrator	Landon LeFevre	June 30, 2020
Region 6		School Board Member	Laila Kammerman	June 30, 2020

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Recommended Alternate Bias and Sensitivity Committee Members

Region	Name	Role	Term Expiration
Region 1	George Ives	Teacher	June 30, 2020
Region 1	Jared Hughes	Teacher	June 30, 2020
Region 1	Bill Rutherford	District Administrator	June 30, 2018
Region 1	Robin Merrifield	School Board Member	June 30, 2018
Region 1	Larry Brown	School Board Member	June 30, 2018
Region 2	Ashley Schaffner	Teacher	June 30, 2018
Region 2	Dawn Fazio	School Board Member	June 30, 2020
Region 3	Melanie Jones	Parent	June 30, 2018
Region 3	Frank Robinson	Teacher	June 30, 2020
Region 3	Ann Farris	District Administrator	June 30, 2018
Region 3	Doug Park	School Board Member	June 30, 2018
Region 3	Dionicio (Don) Pena	School Board Member	June 30, 2018
Region 4	Michelle Sandoz	Parent	June 30, 2018
Region 4	Mandy Baker	Parent	June 30, 2020
Region 4	Olga Maza-Santos	Parent	June 30, 2020
Region 4	Darlene Matson Dyer	Teacher	June 30, 2018
Region 4	Angela Davidson	District Administrator	June 30, 2020
Region 4	Stefanie O'Neill	School Board Member	June 30, 2020
Region 5	Tara Jensen	Parent	June 30, 2020
Region 5	Shawna Sprague	Parent	June 30, 2018
Region 5	La Nae Robinson	Teacher	June 30, 2020
Region 5	Michael Mendive	District Administrator	June 30, 2018
Region 5	Carmelita Benitez	District Administrator	June 30, 2018

Region 5	Brooke Palmer	School Board Member	June 30, 2020
Region 5	David Mattson	School Board Member	June 30, 2020
Region 5	Janie Gebhardt	School Board Member	June 30, 2020
Region 6	Jessica Baksis	Parent	June 30, 2018
Region 6	Bonnie Warne	Teacher	June 30, 2018
Region 6	Darnea Lam	District Administrator	June 30, 2020

TAB	DESCRIPTION	ACTION
1	**IDAHO STATE UNIVERSITY ANNUAL REPORT AND TOUR**	Information Item
2	**CHAIRMAN'S REPORT**	Information Item
3	**NORTHWEST REGIONAL ADVISORY COMMITTEE UPDATE**	Information Item
4	**IDAHO CAREER TECHNICAL EDUCATION ANNUAL REPORT**	Information Item
5	**BOARD POLICY I.E. – EXECUTIVE OFFICERS – FIRST READING**	Motion to Approve
6	**BOARD POLICY I.J. – USE OF INSTITUTIONAL FACILITIES – FIRST READING**	Motion to Approve
7	**BOARD POLICY BYLAWS – SECOND READING**	Motion to Approve
8	**IDAHO INDIAN EDUCATION COMMITTEE - BYLAWS**	Motion to Approve
9	**IDAHO EDUCATOR PIPELINE REPORT**	Information Item
10	**ACCOUNTABILITY OVERSIGHT COMMITTEE – STATEWIDE ACCOUNTABILITY SYSTEM RECOMMENDATIONS**	Motion to Approve
11	**EDUCATION OPPORTUNITY RESOURCE COMMITTEE APPOINTMENT**	Motion to Approve

12	**TEMPORARY/PROPOSED RULE IDAPA 08.01.02 – POSTSECONDARY CREDIT SCHOLARSHIP PROGRAM**	Motion to Approve
13	**TEMPORARY/PROPOSED RULE IDAPA 08.01.04 – POSTSECONDARY RESIDENCY REQUIREMENTS**	Motion to Approve
14	**PROPOSED RULE IDAPA 08.01.09 – RULES GOVERNING THE GEAR UP IDAHO SCHOLARSHIP PROGRAM**	Motion to Approve
15	**TEMPORARY/PROPOSED RULE IDAPA 08.02.01.801, RULES GOVERNING ADMINISTRATION – CONTINUOUS IMPROVEMENT PLANS**	Motion to Approve
16	**TEMPORARY/PROPOSED RULE IDAPA 08.02.01, RULES GOVERNING ADMINISTRATION – LITERACY GROWTH TARGETS**	Motion to Approve
17	**TEMPORARY/PROPOSED RULE IDAPA 08.02.01, RULES GOVERNING ADMINISTRATION – STATEWIDE AVERAGE CLASS SIZE**	Motion to Approve
18	**PROPOSED RULE IDAPA 08.02.02, RULES GOVERNING UNIFORMITY – TEACHER CERTIFICATION REQUIREMENTS**	Motion to Approve
19	**PROPOSED RULE IDAPA 08.02.03, RULES GOVERNING THOROUGHNESS – CAREER TECHNICAL EDUCATION CONTENT STANDARDS**	Motion to Approve
20	**PROPOSED RULE IDAPA 08.02.03.105, RULES GOVERNING THOROUGHNESS – PROFICIENCY GRADUATION REQUIREMENT**	Motion to Approve
21	**TEMPORARY/PROPOSED RULE IDAPA 08.02.03, RULES GOVERNING THOROUGHNESS – CIVICS AND GOVERNMENT CONTENT STANDARDS PROFICIENCY – GRADUATION REQUIREMENT**	Motion to Approve
22	**PROPOSED RULE IDAPA 08.02.03, .111 – 114, RULES GOVERNING THOROUGHNESS – COMPREHENSIVE ASSESSMENT PROGRAM AND ACCOUNTABILITY REQUIREMENTS**	Motion to Approve

23	**PROPOSED RULE IDAPA 08.02.05, RULES GOVERNING PAY FOR SUCCESS CONTRACTING**	Motion to Approve
24	**PROPOSED RULE IDAPA 08.05.01, RULES GOVERNING SEED AND PLANT CERTIFICATION**	Motion to Approve
25	**PROPOSED RULE IDAPA 47.01.01, RULES OF THE DIVISION OF VOCATIONAL REHABILITATION**	Motion to Approve
26	**PROPOSED RULE IDAPA 47.01.02, RULES AND MINIMUM STANDARDS GOVERNING EXTENDED EMPLOYMENT SERVICES**	Motion to Approve
27	**PROPOSED RULE IDAPA 55.01.03, RULES OF PROFESSIONAL TECHNICAL SCHOOLS – CAREER TECHNICAL SCHOOLS**	Motion to Approve

IDAHO STATE UNIVERSITY

SUBJECT

Idaho State University (ISU) 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 ISU 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.

ISU will provide a tour for Board members as follows:

10:00 a.m. - Pick up at Student Union

10:20 a.m. - Walking tour of Gale Life Sciences Complex

11:20 a.m. - Walking tour of Museum of Natural History

12:00 p.m. - Return to Student Union for lunch

IMPACT

ISU utilizes an Institutional Effectiveness and Assessment Council framework to support mission fulfillment. Use of ISU's strategic plan drives the University'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 State Board of Education, the Division of Financial Management, and the Legislative Services Office.

ATTACHMENTS

Attachment 1 – Annual 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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2016

Idaho State University Progress Report

President Arthur Vailas
Idaho State University

Idaho State University Progress Report
August 2016

Strategic Plan Implementation

(The institutions as well as progress toward moving the Board's strategic plan forward)

- Details of implementation
- Status of goals and objectives
- Special appropriations

ISU's Planning and Implementation Process
Creating a New Plan

Idaho State University (ISU) began its process of creating a new strategic plan in the fall of 2015 and it will conclude in June 2017. The deliberate nature of the development of the plan was a result of the leadership's desire to significantly shift ISU's executive decision-making processes. ISU's leadership recognized the need to transition their decision-making process from an operationally focused lens to one that was strategic. The development of that framework coincided with the beginning of the strategic planning process. ISU also recognized the need to align the University's strategic, academic, enrollment and budget plans. Finally, institutional leadership wanted to create an atmosphere that fosters internal and external relationships by incorporating processes that encourage inclusion and transparency. The oversight of the strategic planning process, its implementation, and the evaluation is now the responsibility of the Institutional Effectiveness & Assessment Council (IEAC), which is made up of the Steering Committee and six subcommittees.

The first phase of the revision of strategic plan began after the Northwest Commission on Colleges and Universities (NWCCU) recommended as part of ISU's Year Seven accreditation report in 2014 that it revise its mission and core themes to more closely align with one another. To comply with the NWCCU recommendation, the IEAC utilized the four Core Theme Subcommittees who drafted a revised, proposed mission statement and four core themes. To foster the IEAC's objective of increasing inclusion and transparency in university planning, the Associate Vice President of Institutional Effectiveness facilitated university open-forum meetings and conducted an email campaign to collect feedback. In March, after the State Board of Education's (SBOE) approval, ISU submitted the new mission statement and four core themes to the NWCCU. The administration expects the NWCCU to provide feedback on the changes before the beginning of the fall semester.

The second phase of ISU's strategic planning process began in May when the IEAC approved the creation of the Strategic Planning Working Group. The working group, composed of faculty, staff, students and additional stakeholders, is responsible for creating the remainder of the new plan and evaluating its implementation and execution. The working group will receive training in August then begin creating a new vision statement, the strategic objectives, and the new measures for the objectives. The IEAC

Subcommittees will then create the supporting action plans and establish their associated measures.

To continue the efforts of increasing transparency and inclusion, the IEAC has incorporated into the planning process multiple opportunities for customers and stakeholders to provide feedback. After the working group incorporates the feedback, ISU will submit a draft of the 2018-2022 Strategic Plan to the SBOE in April 2017. The final approval of the new plan will occur in June and ISU will implement it in July.

ISU's Current 2017-2021 Strategic Plan

Idaho State University's 2017 Strategic Plan supports the transition between the old and the new plans. Redesigned, it incorporates a new measuring system that focuses on ISU demonstration of mission fulfillment by utilizing the core themes as overarching strategic goals. Each of the four core themes has multiple indicators and benchmarks established by the IEAC Core Theme Subcommittees; the subcommittees also included the indicators directed by SBOE.

The process to determine if ISU is achieving mission fulfillment is: first add together the indicators' scores within each of the core themes then average that sum. This score represents the core theme's fulfillment. The next step is to add together the four core theme scores then average that sum. This score equates to mission fulfillment. The University's leadership determined that a successful core theme and mission fulfillment ranges between 80-100 percent. As ISU achieves success in accomplishing its core themes, its mission fulfillment score increases proportionally.

Mission Fulfillment Score

Current Mission Fulfillment Score	Core Theme	Core Theme Score
86%	Core Theme 1: Learning and Discovery	88%
	Core Theme 2: Access and Opportunity	88%
	Core Theme 3: Leadership in Health Sciences	90%
	Core Theme 4: Community Engagement and Impact	81%

State Board of Education Strategic Indicators:

Indicator	Benchmark	2015 Score
Number of graduate assistantships with teaching and/or research responsibilities	366	333
Percentage of students enrolled in either an undergraduate or a graduate research course	1,903	1,813
Indicator	**Benchmark**	**2015 Score**
Number of students enrolled in ISU's Early College Program	2,232	2,344
Total number of credits earned in ISU's Early College Program	13,855	18,746
Retention rate of degree-seeking first-time student	80%	74.3
Retention rate of degree seeking new transfer degree-seeking students	85%	74.3
Cost per weighted credit hour to deliver an undergraduate education.	$324.41	$340.63
Completion of undergraduate certificates (1 year or greater) and degrees per $100,000 of education and related spending (i.e., full cost of instruction and student services, plus the portion of institutional support and maintenance assigned to instruction).	1.19	1.70
Total degree production (undergraduate)	1,685	1,769
Total degree production (graduate)	598	628
Unduplicated headcount of graduates and percent of graduates to total unduplicated headcount (undergraduate).	1,631/ 20%	1,713
Unduplicated headcount of graduates and percent of graduates to total unduplicated headcount (graduate).	590/ 31%	620

Enrollment Numbers

(As reported in the performance measure report)

Enrollment Numbers	FY 2013	FY 2014	FY 2015	FY 2016
Annual (unduplicated) Enrollment Headcount				
- Professional Technical	1,771	1,595	1,457	1,378
- Undergraduate	14,509	14,273	13,951	12,898
- Graduate	2,900	2,772	2,665	2,414
Total:	**19,180**	**18,640**	**18,073**	**16,690**
Annual Enrollment Full-Time Equivalency (FTE)				
- Professional Technical	960	870	810	788
- Undergraduate	7,911	7,680	7,861	7,759
- Graduate	2,088	2,106	2,137	2,042
Total:	**10,959**	**10,656**	**10,808**	**10,589**

Retention Rates

(As reported in the performance measure report)

Retention Rate Description	FY 2013	FY 2014	FY 2015	FY 2016	Benchmark
Retention rate of degree-seeking first-time full-time and new transfer students returning for a second year					
-First-time full-time degree-seeking	62.1%	66.8%	71.3%	71.5%	80.0%
-New transfer degree-seeking	69.2%	73.5%	74.3%	76.4%	85.0%

Graduation Rates

(As reported in the performance measure report)

Graduation Rates	FY 2013	FY 2014	FY 2015	FY 2016
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%	33%	32%

Degrees Awarded	FY 2013	FY 2014	FY 2015
Degrees/Certificates Awarded			
- Technical Certificates	219	167	199
- Associate	354	393	363
- Bachelor	1,136	1,181	1,123
- Master	480	474	438
- Doctorate	154	146	160
Total:	**2,343**	**2,361**	**2,283**
% awarded in Health Professions	32%	34%	32%
% awarded in STEM Disciplines	19%	17%	17%

Research and Economic Development

Intellectual Property Foundation (IPF) Budget and Operations: The FY 2017 budget has been prepared, and provisions in the budget provide for the procurement of commercialization revenues to allow the IPF will become self-sustainable. In this regard, the IPF received its first royalty disbursement from one of its private company partners, in the amount of $100,000.

IPF Technology Summit and Entrepreneurship Conference: Bi-weekly meetings are currently being held with planning committees in preparation for a two-day technology summit and entrepreneurship conference at ISU Pocatello in February of 2017.

IPF/Center for Entrepreneurship and Economic Development (CEED) Collaboration: Joint coordination and collaboration efforts continue between the IPF and CEED to facilitate progress of ISU technologies toward market entry while also providing support for CEED activities.

Private Sector Collaboration and Growth in Idaho: Talks to develop partnerships with new private-sector entities, including talks to relocate companies to Idaho from other locations in the United States, Japan, and Australia are ongoing on progressing.

Technology Evaluation Process: Analysis and evaluation of potential for technologies developed at ISU continues, both in collaboration with external research partners and the Bengal Solutions teams at ISU.

Increasing ISU Presence: The Director of Technology Commercialization is continuing to increase the public awareness of technology commercialization at ISU through contributions to publications and presentations to local and national groups and professional organizations.

Increased Revenue Generation: Developmental collaborations with startups and established companies continue to grow, and reports from initial licensees of ISU-owned intellectual property indicate that early-stage market entry and profitable return is expected soon, as scale-up of production for those technologies developed together with ISU researchers is achieved.

Entrepreneurial Efforts Increase: Multiple startup company projects are in development from both student groups and faculty researchers, with at least two new companies expected to be founded within the next 6 months.

Research and Sponsored Projects Update (Internal)

Awarded over $98,000 in internal Seed Grants: These Seed Grants support junior faculty starting their research or senior faculty changing the direction of their research.

Awarded over $169,000 in internal Developing Collaborations Grants: The Developing Collaborative Partnerships internal grant program supports the development of large-scale interdisciplinary/collaborative research projects.

Awarded $35,000 in internal Faculty Travel Grants: These funds serve to develop faculty research, scholarly, and/or creative activities.

Total internal grants awarded = $302,768 across five different colleges.

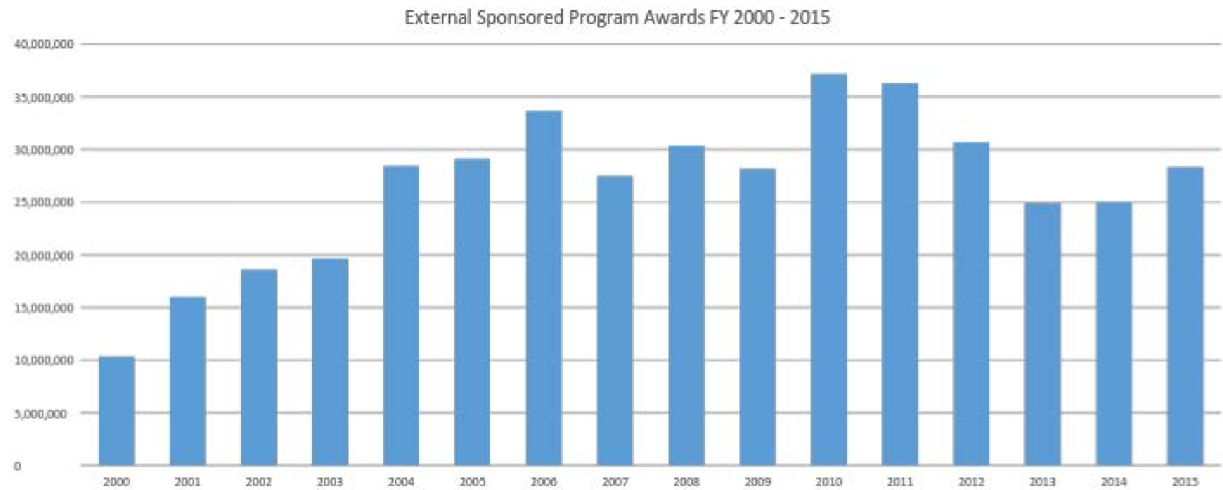
Supported over 60 faculty in attending Grant Writers Seminars & Workshops: Further, of these 60+ faculty members, 6 were selected to engage with GWSW consultants to develop actual proposals for submission to various funding agencies such as NSF and NIH.

Continued transition to paperless environment: Further implementation of electronic routing and approvals of Cayuse and data management systems.

Implemented an electronic poster and presentation process: Academic departments and campus groups can utilize (free of charge) up to 60 large panel electronic displays to more accurately display their research and scholarly activities at campus functions.

Research and Sponsored Projects Update (External)

ISU Extramural Research Portfolio: The growth target of 3% for increase in extramural funding from FY15 to FY16 has been far exceeded. Final numbers are not yet in, but extramural funding for research through grants and contracts will show a growth of at least 10%. This will continue and reinforce the recent two-year positive growth profile and competitive sustainability for ISU as depicted in the following graph:



HERC Infrastructure Funds: The HERC infrastructure funds of $250,000 for FY16 are currently being deployed to create a new and extremely powerful Research Data Center (RDC) on the Pocatello campus. It is expected that the entire ISU community will benefit from the computing power made available by the significant infrastructure upgrade.

Research CAES Associate Director: Richard Jacobsen was appointed ISU Associate Director of CAES October 28, 2015, to replace Jason Harris who left for a position at Purdue.

CAES/INL/ISU Joint Appointments: ISU hired two new employees on joint-appointments with INL in Idaho Falls, Drs. Leslie Kerby and Haiming Wen. Both began in January, 2016, and are enjoying success in their research work with INL.

CAES proposal to DOE-NE for ISU participation in a Nuclear Energy Strategic Analysis Center: April 13. Proposal is still under consideration.

Launch of the Bioskills Learning Center in Meridian: Pilot event for local health care providers held in June, 2016.

DOE NEUP (Nuclear Energy University Programs) Awards: Announced in mid-June 2016, ISU won awards that included $80,805 for Reactor Upgrades in the Infrastructure category, and $500,000 (for year 1 out of a $3M total award over 3 years) to Dr. Haiming Wen for Enhancing Irradiation Tolerance of Steels via Nanostructuring by Innovative Manufacturing Technologies in the Nuclear Energy Enhancing Technology Awards category.

Cyber security initiative at CAES: Cybersecurity for the Nuclear Industry - Meeting scheduled July 22, 2016.

Industry Funding and Relationships Update:

C*urrently active/funded projects*

YTD for FY16: ISU received the following funding from business & industry partners including Google at $581,000, NuMat at $220,000, ScanTech Identification Beam Systems, LLC at $2,3000,000 and a second commitment of ScanTech Services, LLC, of $86,000.

Projects in negotiation

Medical Isotopes

An Australian company will be partnering with the IAC to develop combination pharmaceuticals for cancer treatment together with ISU's Cu-67 project. The company is a co-sponsor with significant financial involvement in an IGEM proposal currently under review.

Air Filter Technology

Idaho Commerce and ISU’s Technology Commercialization Office are working with an ISU PI in seeking an industry partner for new air filter technology: a Pocatello-based portable solar power company with close ties to Venture Capital in Utah and California is currently the primary lead.

Power Industry Effluent

ISU’s Technology Commercialization Office is working with an ISU PI in partnership with the Intermountain Power Services Corporation related to a technology for recovering rare earth elements from coal ash and other power industry effluent.

STTR Proposal in Preparation

ISU is partnering with NuMat Inc. in the submission of a multiyear Small Business Technology Transfer (STTR) grant proposal.

Office for Research: Compliance Improvements Update

Export control: Development of export control processes at ISU, RISE Technology Control Plan, processes set up for review of international travel, purchasing, shipping internationally

Animal Research: AAALAC full accreditation reinstated, developed occupational health review program for animal research.

Biosafety: External review of biosafety process, continued development of the biosafety process at ISU

Diversity and Outreach: Increased URM student participation in ISU MURI (NSF EPSCoR), URM attendance at Robotics camp. Women of Color student group developed. Increased community outreach for STEM at ISU. Increased connections with URM community in the area.

Conflict of Interest Policy: Continued refinement of required COI verification on sponsored projects

Highlight Any College Standouts

College of Arts & Letters
• Creation of Liberal Arts High to Connect ISU Faculty and Regional High School Teachers
• Opening of Integrated Research Center to Facilitate Interdisciplinary Collaborations Across Campus
• Interdisciplinary Collaborative Narrative Book Contract and Publication in the Journal for Teaching and Learning with Technology
• Enhanced Graduate Enrollment by 6.8%
• Successful Launch of the Teaching of English Composition Book Award
• Hired new Jazz Studies Faculty Member to extend Musical interests and expertise
• First Irish FTLA Student and Fulbright Award for Dr. Alan Johnson
• Established 9 new named Endowed Scholarships

College of Business
• Successfully recruited three additional Ph.D.s in Accounting to join the faculty in the fall of 2016
• Hired new Chair of the Department of Accounting
• Put forth a proposal for a Master of Science in Health Informatics (MSHI)
• Put forth a proposal to the Undergraduate Curriculum Committee for a Bachelor of Business Administration in Economics
• The College of Business presented proposals to Graduate Council for both a Master of Science in Data Analytics and, in cooperation with the Division of Health Sciences, a Master of Healthcare Administration
• New Technology Teaching and Learning Center, featuring a drop in laptop-based teaching lab and a multi-purpose classroom capable of supporting Collaborate, Skype, Google Hangouts, lecture capture, and distance learning to two remote sites simultaneously
• The College of Business is aggressively launching in Twin Falls. There are currently in excess of 350 students in CSI's academic two-year program in business. Seek to satisfy this market with high quality bachelor degrees offered on the CSI campus

College of Education

- Successful Initial accreditation by the Commission on Accreditation of Athletic Training Education (CAATE) New Master of Science in Athletic Training Program -March 2015
- Successful National Council for Accreditation of Teacher Education (NCATE) visit and all standards met in the Teacher Preparation Program -September 2015
- CPI Tutoring Program-60 tutors, 4,800 hours, 20 area schools
- The Albion Center for Education Innovation has begun a multi-year comprehensive school support project with the American United School in Kuwait centered on improving teaching and learning in multiple content areas and school leadership
- The first annual KidU Summer Camp six-week program provides educational and recreational experiences for 1^{st}-6^{th} grade students
- Partnered with nine Southeast Idaho High Schools in establishing Future Educator Association Clubs
- The Center for Sports Concussion-provides educational outreach in Eastern Idaho on sports-related concussions in the adolescent athlete
- The opening of the ATLAS Center to centralize Advising, Teaching, Learning, and Student Services

College of Science & Engineering

- Significant Enrollment Growth: CoSE student majors up by 10%, 225 students over previous academic year
- In FY15 CoSE faculty secured $6.1 million in research funding
- Student pass rates in nine introductory Math, Science and Engineering courses increased by 5-20% due to a new Proactive Advising Initiative

College of Technology

- COT is starting five new programs as a result of industry demands
    - 3 of the 5 are in line the University's health mission
    - will directly assist veterans in achieving nursing degrees
    - OTA will be the only program of its kind in the state
- UAS-an emerging field with high visibility and demand
- Cyber-Physical Security is in direct alignment with what the Department of Homeland Security and the Idaho National Lab are touting as one of the most needed and important fields for the future

Division of Health Sciences

- Construction of the L.S. and Aline W. Skaggs Treasure Valley Anatomy and Physiology Laboratories (TVAPL) completed at ISU-Meridian with Grand Opening-Fall 2015
- Bengal Lab organized to begin January 2016

- Bengal Pharmacy opened tele-pharmacy in Challis, ID
- Billing & Practice Management System in Clinics implemented
- Increased Collaboration with Gritman Medical Center
- Created and Restructured Community & Public Health Department:
  - Health Education
  - Master of Public Health
- Created Emergency Services Department:
  - Emergency Medical Services
  - Fire Services Administration
  - Paramedic Science
- Established "Health Bengal" Initiative
- Expanded MLS to Idaho Falls Location
- Joint Pharmacy Programs w/University of Alaska Anchorage
- Doubling of PAS space in Meridian completed to accommodate Caldwell student cohort
- SPA Program renovated space for additional research labs
- Additional Program Accreditations in HCA, MPH and RS
- Moving forward with an accredited institution for Interprofessional Continuing Education
- The Residencies-- the Dental Residency and Family Medicine were both re-accredited in Fall 2015
- Nursing graduated its first Ph.D.
- Dental Hygiene opened a clinic in Idaho Falls on the EITEC campus

Collaborations with Other Institutions or Industry

Collaborations in Graduate Education and Related: BYU-Idaho, South Dakota University, and the INL (Working on partnering with them to promote internships).

Partnership between the INL and ISU, current state:
In FY2015, the INL hired total of 32 graduates from Idaho State University, the largest number by far of any Idaho university.

In FY2015, the INL employed 32 Interns and 1 postdoc from ISU. The number of ISU interns is the largest of all Idaho universities with the exception of BYU-I.

Strategically, ISU is partnering with the INL on workforce development into needed disciplines by creating more joint appointments in areas of need. In this regard, ISU faculty and administrators are engaging several Directorates in the INL (including N&HS, NS&T and EES&T) with a view to optimize joint and reverse joint appointments, sharing of graduate students and projects by giving access to graduate students at ISU, to joint faculty appointments at rank, to appropriate qualified INL staff. This will particularly focus on areas of INL current and future needs. Currently, three new joint appointments are in the process of being negotiated and the hiring process will start soon.

Further, ISU is setting up to approach the INL to plan for increases in intern and postdoc opportunities and also considering partnering with joint faculty to obtain input in curriculum design and delivery. The following areas are of particular interest to both the INL and ISU: energy and environment, chemistry and chemical engineering, radiation and rechnical safety, nuclear science, technology and nuclear engineering, and cyber- and computer security training and research (including national and homeland security).

Capital Campaign

- Academic Enhancements
- Scholarship Endowment

Idaho State University does not currently have a capital campaign.

Community Partnerships

Idaho State University Bengal Pharmacy operates in Pocatello, Arco, Challis, and has received approval from the Foundation Board to open a location in Council in Fall 2016. In addition, there is a request pending to partner with Kendrick.

New Buildings

While Idaho State University has made a number of enhancements and improvements to buildings, there are no new buildings.

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SUBJECT

Chairperson Report

BACKGROUND/DISCUSSION

The Planning, Policy and Governmental Affairs chairperson would like to discuss adding a standing agenda item for providing updates to the full Board on issues that are being worked on by the committee and would come to the Board at a later date.

Updates would serve as a notification but would not lead to a general discussion of the issues unless properly noticed in the agenda in compliance with Idaho's open meeting law.

BOARD ACTION

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

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SUBJECT

Northwest Regional Advisory Committee Update

BACKGROUND/DISCUSSION

The Comprehensive Centers (Centers) program is authorized by Title II of the Educational Technical Assistance Act of 2002 (ETAA) and the Education Sciences Reform Act (ESRA) of 2002. The U.S. Department of Education (Department) funds these Centers to provide technical assistance to State Education Agencies (SEAs) that builds SEA capacity to: support local educational agencies (LEAs or districts) and schools, especially low-performing districts and schools; improve educational outcomes for all students; close achievement gaps; and improve the quality of instruction.

Before a competition for the Centers program is held, the ETAA requires the establishment of ten (10) Regional Advisory Committees (RACs) (not to exceed 25 members). The purpose of these committees is to collect information on the educational needs of each of the ten (10) regions served by the Regional Educational Laboratories as part of the Centers program. To the extent the Secretary deems appropriate, the Department will use the information submitted by the RACs, along with other relevant regional surveys of needs, to establish priorities for the next cohort of Centers.

The US Department of Education changed the process for obtaining recommendations from consensus to seeking the technical advice of each individual RAC member. Not later than six months after each RAC is convened, they will submit a report based on this needs assessment to the Education Secretary. The report will contain an analysis of the educational needs of their region and each individual's technical advice to the Secretary regarding how those needs might be most effectively addressed. The Secretary shall establish priorities for the next cohort of comprehensive centers, taking into account these regional needs identified by individual RAC members and other relevant regional surveys of educational needs, to the extent the Secretary deems appropriate.

Dr. Linda Clark was nominated and chosen by the U.S. Department of Education to serve as a member of the RAC to provide technical advice. Dr. Clark will update the Board on the RAC's work completed thus far and the survey used to collect feedback.

IMPACT

The feedback obtained from the online survey, located at the following link: https://www.surveymonkey.com/r/PML2GPN, will provide guidance to address educational issues of our region and how the U.S. Department of Education's Comprehensive Centers can provide assistance to address these same issues.

BOARD ACTION

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

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IDAHO DIVISION OF CAREER TECHNCIAL EDUCATION

SUBJECT

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 the Division of Career Technical Education (Division) 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.

Dwight Johnson, State Administrator of the Division, will provide an overview of Division's progress in carrying out the agency's strategic plan.

ATTACHEMENTS

BOARD ACTION

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

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We prepare Idaho's youth and adults for high-skill, in-demand careers.

IDAHO Career & Technical Education

Journey to Career: Update on ICTE

Presented by State Administrator Dwight Johnson
August 11, 2016

Fostering Connections: CTE image

- Name change to ICTE (captures the CTE momentum and aligns to national identification)
- New look and logo (embodies energy, forward momentum, and connection)
- New website (now with resources for students, and industry)

Increasing CTE Program Quality

Program Alignment

- Increasing advanced opportunities
- 2015: 9 postsecondary programs horizontally aligned
- 2016: 13 postsecondary programs horizontally aligned
- Professional Development of teachers for Vertical Alignment

Idaho SkillStack®

- Idaho SkillStack® badges clearly communicate an individual's skills to the world.

Meaningful Assessments

- Program Quality Review
- Technical Skill Assessments
- Workplace Readiness Assessment

CTE Credit for HS Graduation

Growing CTE Digital

- Bringing the opportunity of CTE to all of Idaho.

Connecting Education to Employment

- Engaging Industry
- College & Career Advising

Enhancing CTE Teacher Pipeline

- Devoting resources to increase recruitment and retention
- Reducing costs and barriers to becoming a CTE teacher

Expanding ICTE Capacity

- Enhancing productivity with creative capacity solutions
- Improving office culture

Dwight Johnson, State Administrator
Dwight.Johnson@cte.Idaho.gov – 208.429.5501

We prepare Idaho's youth and adults for high-skill, in-demand careers.

IDAHO Career & Technical Education

Journey to Career: Update on ICTE (cont.)

Presented by State Administrator Dwight Johnson
August 11, 2016

ICTE Budget Overview:

Postsecondary	$47.53 Million
Secondary	$15.86 Million
ABE / GED	$3.36 Million
Statewide Initiatives	$1.66 Million
Division Support	$2.70 Million (3.8%)
Total:	**71.11 Million**

Investing in Idaho's Talent Pipeline

Postsecondary Total FY17 Appropriation: $47.53 Million

"ROI" Appropriated in FY17: $3.6 Million

"ROI" FY 18 Request:
★ $2.4 Million

Industry Partnership Request FY18:
★ $1 Million

Secondary Total FY17 Appropriation: $15.86 Million

Secondary budget breakdown:

Added Cost	CT Schools	Ag Incentive	Federal Perkins
$7.5 million	**$4.8 million**	**$325,000**	**$3.2 Million**

FY 2018 Increase Requested:

★ Added Cost - $375,000 (5% increase)
★ All Program Incentive Funding - $496,400 (Includes 1 FTE)

Dwight Johnson, State Administrator
Dwight.Johnson@cte.Idaho.gov – 208.429.5501

★ Budget Line-Item Request

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IDAHO Career & Technical Education

Journey to Career

ICTE Annual Report

Idaho State Board of Education

August 11, 2016

Dwight Johnson, ICTE State Administrator

IDAHO

Career & Technical Education

Dwight Johnson, ICTE State Administrator

IDAHO Career & Technical Education

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I learn by doing with CTE.

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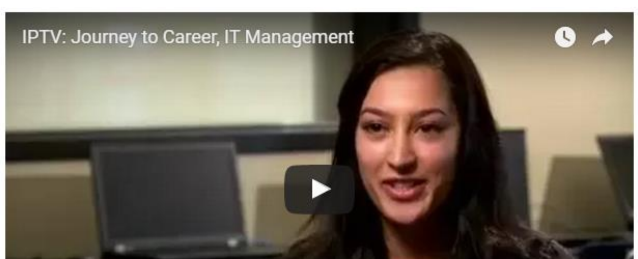
We prepare Idaho's youth and adults for high-skill, in-demand careers.

Idaho CTE Stories

Journey to Career, Information Technology



IPTV: Journey to Career, Information Technology

Watch the story of this first generation American as she pursues the field of information technology. Her family traveled to the United States in search of a better education, she began to realize that goal when she discovered a high school career & technical program. She encourages girls and

We prepare Idaho's youth and adults for high-skill, in-demand careers.

IDAHO Career & Technical Education

CTE Program Alignment

Dwight Johnson, ICTE State Administrator

We prepare Idaho's youth and adults for high-skill, in-demand careers.

IDAHO Career & Technical Education

Industry + Faculty = Learning Outcomes

Horizontal Alignment

Vertical Alignment

We prepare Idaho's youth and adults for high-skill, in-demand careers.

IDAHO Career & Technical Education

Programs Horizontally Aligned:

2015

- Administrative Services
- Auto Collision Repair
- Automotive Technology
- Computer Support
- Diesel Technology
- Precision Machining
- Programming Software Development
- Web Design Development
- Welding

2016

- Agribusiness
- Animal Science
- Applied Accounting
- Commercial Graphic Design
- Culinary
- Drafting Technology
- Electronics
- Hospitality Management
- Marketing
- Networking Technology
- Ornamental Horticulture
- Pre-Engineering Technology
- Residential Construction

Dwight Johnson, ICTE State Administrator

We prepare Idaho's youth and adults for high-skill, in-demand careers.

IDAHO Career & Technical Education

Program Quality

- Standards Development
- Technical Skill Assessments
- Workplace Readiness Assessments
- Training at Annual Professional Development Conf.

Dwight Johnson, ICTE State Administrator

Video

It’s all about your Skills.

Dwight Johnson, ICTE State Administrator

We prepare Idaho's youth and adults for high-skill, in-demand careers.

IDAHO Career & Technical Education

Connecting Education to Employment

- Career & College Advising
- Applied Learning Opportunities:
  - Work-based learning
  - School-to-Registered Apprenticeships
  - Internships
  - Career Technical Student Organizations
- Improve Technical Advisory Committee Model
- CTE Credit for HS Graduation

Dwight Johnson, ICTE State Administrator

CTE Digital: Bringing the opportunity of CTE to all of Idaho.

Enhance CTE Teacher Pipeline

We prepare Idaho's youth and adults for high-skill, in-demand careers.

IDAHO Career & Technical Education

ICTE Budget Overview:

Postsecondary	$47.7 Million
Secondary	$15.86 Million
ABE/GED	$3.18 Million
Statewide Initiatives	$1.66 Million
Division Support	$2.70 Million (3.8%)
CPM/Health Matters	$.40 Million
Total:	**$71.5 Million**

Dwight Johnson, ICTE State Administrator

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IDAHO Career & Technical Education

Postsecondary

Investing in Idaho's Talent Pipeline

Total FY17 Appropriation: $47.7 Million

- Federal Perkins Funding - $3 Million
- State Funding – $44.7 Million
  Includes $3.8 Million - "ROI Proposal" increase

★ **FY18 Budget Request:**

"ROI" Line-Items - $2.4 Million
Industry Partnership - $1 Million
Adult Basic Ed/GED® - $250,000

★ Budget Line-Item Request

Dwight Johnson, ICTE State Administrator

We prepare Idaho's youth and adults for high-skill, in-demand careers.

IDAHO Career & Technical Education

Postsecondary

Invest in Idaho's Talent Pipeline

★ **Return on Investment Proposal:**
FY18 - $2.4 Million

16 Programs	Business, Health Care, Information Tech, Manufacturing, Transportation
High Demand	958 annual job openings
Current Graduates	138 with 100% placement (141 on wait list + new programs)
High Wages	Starting Salaries: $33,530 - $78,400
Request	$2,400,000 (5% funding increase)
Projected Results	248 additional graduates (180% increase)

★ Legislative Idea/Line-Item Request

Dwight Johnson, ICTE State Administrator

We prepare Idaho's youth and adults for high-skill, in-demand careers.

IDAHO Career & Technical Education

Postsecondary

Invest in Idaho's Talent Pipeline

Industry Partnership Fund

★ **FY18 - $1 Million**

- SB 1332 – Passed but not funded
- Rapid Response fund
- Credit and Non-credit training
- Encourages industry commitment (cash or in-kind)
- Overseen by ICTE & Technical College Leadership Council

★ Legislative Idea/Line-Item Request

Dwight Johnson, ICTE State Administrator

We prepare Idaho's youth and adults for high-skill, in-demand careers.

IDAHO Career & Technical Education

Secondary:

Investing in Idaho's Talent Pipeline

Total: FY17 Appropriation
$15.86 Million

Added Cost	CT Schools	Ag Incentive	Federal Perkins
$7.5 million	$4.8 million	$325,000	$3.2 Million

FY18 Budget Requested:

- ★ Added Cost - $375,000 (5% increase)
- ★ All CTE Program Incentive Funding - $498,500 (Includes 1 FTE)

★ Budget Line-Item Requests

Dwight Johnson, ICTE State Administrator

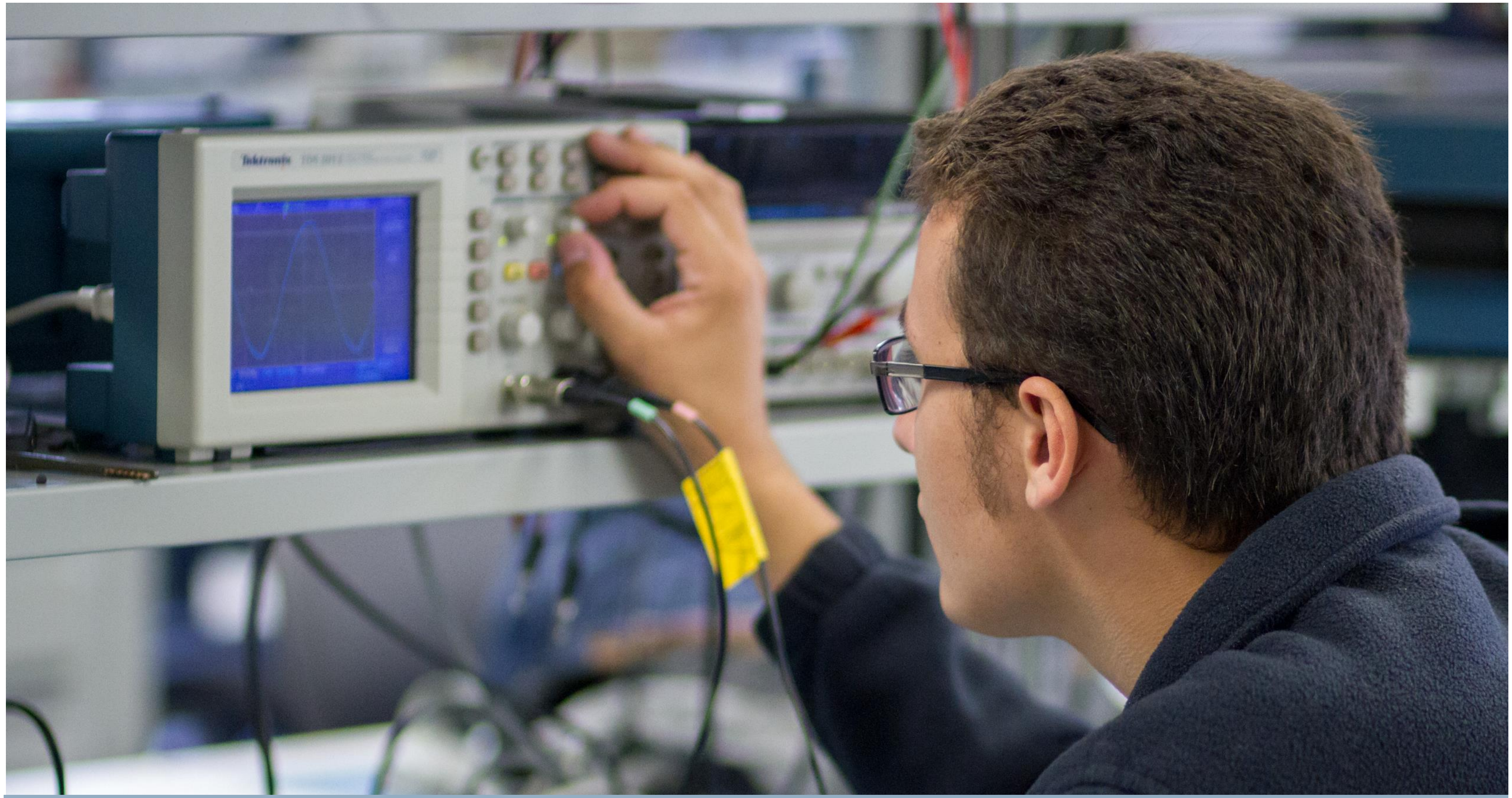
Weeks of:
- September 19, CSI CWI
- September 26, LCSC NIC
- October 10, ISU EITC

In partnership with:
Idaho Chamber Alliance

Legislative Tours

Addressing Division Capacity
Enhancing Support for CTSOs

Dwight Johnson, ICTE State Administrator



Video

Together our mission is to prepare Idaho's youth and adults for high-skill, in-demand careers.

And…it's working!

Dwight Johnson, ICTE State Administrator

Fostering Connections: ICTE

Dwight Johnson, ICTE State Administrator

SUBJECT

Board Policy I.E. Executive Officers – First Reading

REFERENCE

December 2008	Board approved the first reading with changes of Board Policy I.E. Executive Officers, multi-year contracts.
February 2009	Board discussion of Board Policy I.E. Executive Officers
June 2009	Board approved second reading I.E. Executive Officers with amendments, multi-year contracts.
August 2009	Board Approved first reading with changes of Board Policy I.E.4. Reimbursement of expenses
October 2009	Board approved second reading of Board Policy I.E.4 Reimbursement of expenses
October 2010	Board approved first reading of Board Policy I.E.2. Presidents/Agency Heads allowing CEO's to receive stipends or other forms of compensation for unrelated duties or activities
December 2010	Board approved second reading of Board Policy I.E.2
December 2015	Board approved first reading of Board Policy I.E. Executive Officers, regarding the timely reporting of events.
February 2016	Board approved second reading of Board Policy I.E. Executive Officers

APPLICABLE STATUTE, RULE, OR POLICY

Idaho State Board of Education Governing Policies & Procedures, Sections I.E. Executive Officers.

BACKGROUND/DISCUSSION

State Board of Education Policy, Section I.E., grants each institutional president the use of an institution automobile, maintained by the institution, or a vehicle allowance, at their discretion. When using an institution owned vehicle it is customary for the institution to assign the vehicle to the institution president for their sole use.

Currently state owned or controlled vehicles (with few exceptions for law enforcement) are required to be conspicuously marked as state vehicles (Idaho Code §49-2426) and are only allowed to be used for official business. This is not consistent with the current practice when a president has used an institution vehicle rather than receiving the vehicle allowance. The proposed changes to Board Policy I.E. Executive Officers would elimination the option for the chief executive officer to use an institution vehicle, and would set out provisions for reimbursement and insurance requirements when a personal vehicle is used for business purposes.

The proposed amendments bring the policy into alignment with state requirements, including Risk Management.

IMPACT

Approval of the proposed amendments would bring the policy into alignment with state law and risk management insurance requirements.

ATTACHMENTS

Attachment 1 – First Reading I.E. Executive Officers Page 3

STAFF COMMENTS AND RECOMMENDATIONS

The proposed amendments were developed in conjunction with proposed amendment to Board Policy II.F. and the use of "courtesy cars." While neither policy amendment is dependent on the other, they are in alignment. Proposed amendment to Board Policy II.F. will be considered by the Board under a separate agenda item at the August Board meeting.

Staff recommends approval.

BOARD ACTION

I move to approve the first reading of proposed amendments to Board Policy section I.E. Executive Officers, as submitted in Attachment 1.

Moved by __________ Seconded by __________ Carried Yes _____ No _____

Idaho State Board of Education
GOVERNING POLICIES AND PROCEDURES
SECTION: I. GENERAL GOVERNING POLICIES AND PROCEDURES
SUBSECTION: E. Executive Officers ~~February~~ October 2016

1. Executive Director

   The Executive Director is appointed by and serves in this position at the pleasure of the Board. The Executive Director serves as the chief executive officer of the State Board of Education. Pursuant to Idaho Code 33-102A the Executive Director shall be under the direction of the Board and shall have such duties and powers as are prescribed by the Board. The Executive Director is charged with ensuring the effective articulation and coordination of institution, and agency concerns and is advisor to the Board and the Presidents/Agency Heads on all appropriate matters.

2. Presidents/Agency Heads

   a. Responsibilities

      The President/Agency Head is the chief program and administrative officer of the institution or agency. The President/Agency Head has full power and responsibility within the framework of the Board's Governing Policies and Procedures for the organization, management, direction, and supervision of the institution or agency and is held accountable by the Board for the successful functioning of the institution or agency in all of its units, divisions, and services.

      For the higher education institutions, the Board expects the Presidents to obtain the necessary input from the faculty, classified and exempt employees, and students, but it holds the Presidents ultimately responsible for the well-being of the institutions, and final decisions at the institutional level rest with the Presidents. The Presidents shall keep the Board apprised, within 24 hours, through the Executive Director, of all developments concerning the institution, its employees, and its students, which are likely to be of interest to the public.

   b. The Chief Executive Officer is held accountable to the Board for performing the following duties within his or her designated areas of responsibility:

      i. Relations with the Board

         1) Conduct of the institution or agency in accordance with the Governing Policies and Procedures of the Board and applicable state and federal laws.

         2) Effective communication among the Board, the Board office, and the institution or agency.

         3) Preparation of such budgets as may be necessary for proper reporting and planning.

4) Transmittal to the Board of recommendations initiated within the institution or agency.

5) Participation and cooperation with the office of the Board in the development, coordination, and implementation of policies, programs, and all other matters of statewide concern.

6) Notification to Board President or Executive Director of any out-of-state absence exceeding one week.

ii. Leadership of the Institution or Agency

1) Recruitment and retention of employees

2) Development of programs, in accordance with an evolving plan for the institution or agency.

3) In cooperation with appropriate parties, the promotion of the effective and efficient functioning of the institution or agency.

4) Development of methods that will encourage responsible and effective contributions by various parties associated with the institution or agency in the achievement of the goals of the institution or agency.

iii. Relations with the Public

1) Development of rapport between the institution or agency and the public that each serves.

2) Official representation of the institution or agency and its Board-approved role and mission to the public.

c. Appointment Terms and Conditions

Each chief executive officer is employed and serves at the pleasure of the Board as an at-will employee. Appointments to the position of President of the higher education institutions and Executive Director of the Board are made by the Board. The Executive Director shall have authority to identify candidates and make recommendations for the appointment of Agency Heads, which must be approved and appointed by the Board. The Board and each chief executive officer may enter into an employment agreement for a term not to exceed five (5) years that documents the period of appointment, compensation, and any additional terms. The Board's Policies regarding Non-classified Employees, Section II, Subsection F, do not apply to the Board's chief executive officers.

d. Evaluations

The Agency Heads are evaluated by the Executive Director annually, who makes recommendations to the Board with respect to compensation and employment actions. The Presidents and Executive Director are evaluated by the Board annually. The performance evaluation is based upon the terms of any employment agreement, the duties outlined in the policy and mutually agreed upon goals. Final decisions with respect to compensation and employment actions with regard to chief executive officers are made by the Board.

e. Compensation and Benefits

i. Each chief executive officer's annual compensation shall be set and approved by the Board. A chief executive officer shall not receive supplemental salary compensation related to his or her service as chief executive officer from an affiliated institutional foundation, or from any other source except that institutional Presidents may receive perquisites or benefits as permitted by topic 3, subtopic d, below. A chief executive officer must disclose to the Board, through its Executive Director or in executive session as appropriate (with updates as necessary), any activities and financial interests, including compensation from an outside source unrelated to his or her service as chief executive officer, that affects or could potentially affect the chief executive officer's judgment or commitment to the Board or the institution.

ii. In addition to the compensation referred to above, each chief executive officer shall receive the usual and ordinary medical, retirement, leave, educational, and other benefits available to all institutional, and agency employees.

iii. Each chief executive officer shall receive reasonable and adequate liability insurance coverage under the state's risk management program.

iv. Relocation and moving expenses incurred by each chief executive officer will be paid in accordance with the policies and rates established by the State Board of Examiners.

v. Each chief executive officer earns annual leave at a rate of two (2) days per month or major fraction thereof of credited state service.

f. Termination
In the event a chief executive officer's appointment is terminated by Board action (for or without cause), than such individual shall only be entitled to continued compensation or benefits, if any, for which he or she may be eligible under the terms of his or her employment agreement.

3. Institutional Presidents: Housing, Automobile, and Expense Reimbursement

a. The institutional Presidents are responsible for hosting official functions to promote their respective institutions. At institutions with official residences, the Presidents of such institutions are required to live in the official residences provided.

To preserve the image of the institutions and to provide adequate maintenance of state-owned property, the institutions shall provide support services for these residences. This support shall include maintenance and repairs, utilities, and grounds keeping.

In the event that the institution does not own an official residence, a housing allowance will be provided that is similar in value to living in an official residence. In addition, this allowance shall cover reasonable maintenance and repair expenses related to the use of this home as the President's official residence.

b. Each institutional President shall be provided an automobile allowance. ~~Maintenance, repairs, gas for business use, and insurance shall be provided for this vehicle.~~

~~If an institutional President does not elect to use a vehicle provided by the institution, the institution will provide the President a vehicle allowance in lieu of the cost of leasing, automobile maintenance, and insurance. Documented business travel will be reimbursed to compensate for gasoline costs.~~
The institution shall pay for maintenance, repair, fuel, and insurance costs attributable to business use of the automobile. If the President intends to use the automobile for business and personal use, the President shall obtain insurance for the automobile which meets with the requirements of Idaho's Risk Management Program, including applicable coverages and amounts.

c. The institutional Presidents shall receive reimbursement for official entertainment expenses. Public relations and other out-of-pocket expenses may be reimbursed if they are directly related to the function of the institution as determined by the President. (See fiscal policy for entertainment and related expenses.)

d. Foundation Provided Funds for Compensation, Perquisites or Benefits

Perquisites or benefits for the institutional Presidents, may be provided by the institution's affiliated foundation meeting all requirements of Section V, Subsection E of the Board's Governing Policies and Procedures if approved by the Board on a case-by-case basis.

4. Institutional Presidents: Official Duties Related Spousal Expenses

The Board acknowledges that the spouse of an institutional president provides valuable service activities on behalf of the institution, the Board, and to the Idaho higher education system. The Board further recognizes that the spouse may be expected to attend certain functions related to the ongoing mission and purposes of the institution. Accordingly, a spouse shall be eligible for reimbursement of authorized official travel and business related expenses, in accordance with the State of Idaho's travel and expense policies, as long as such expenses have a bona fide business purpose. To be a bona fide business purpose the presence and activities of the spouse at the function must be significant and essential (not just beneficial) to the institution. A president's spouse attending official functions as part of protocol or tradition and where the spouse makes an important contribution to the function can be considered serving a business purpose. For example, ceremonial functions, fundraising events, alumni gatherings, community, and recruiting events are examples of activities at which the presence of a spouse may contribute to the mission of the University. If a spouse has no significant role, or performs only incidental duties of a purely social or clerical nature, then such does not constitute a bona fide business purpose. Spousal expenses may not be charged to state funds; various non-state funds controlled by the institution may be used to fund spousal expenses.

5. President Emeritus/Emerita Designation

   The Board may choose to grant President Emeritus/Emerita status to a retiring President. President Emeritus/Emerita status should be reserved to honor, in retirement, a president who has made distinguished professional contributions to the institution and who has also served a significant portion of his/her career at the institution. The intent of conferring President Emeritus/Emerita status is to bestow an honorary title in recognition of successful tenure in the Presidential role.

   a. Appointment Procedure

      An institution may forward a recommendation to the Board that this honorary title be conferred upon a President that is retiring or has retired from the institution. Each institution shall provide for input into the recommendation from the campus community.

   b. Rights, Privileges and Responsibilities

      Rights and privileges of such a distinction shall be, insofar as resources will allow, similar to those of active institutional staff, including such privileges as:

      i. staff privileges for activities, events and campus facilities;

      ii. receipt of institutional newspaper and other major institutional publications and receipt of employee/spouse fee privilege (see Section V. R.).

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UNIVERSITY OF IDAHO

SUBJECT

Board Policy I.J. Use of Institutional Facilities – First Reading

REFERENCE

February 2011	Board approved first reading of amendments to Board policy I.J. specific to the alcohol possession and consumption section in relation to NCAA events.
April 2011	Board approved second reading of amendments to Board policy I.J. specific to the alcohol possession and consumption section in relation to NCAA events.
December 2013	Board approved first reading of amendments to Board policy I.J. specific to the use of institutions facilities in competition with the private sector.
February 2014	Board approved second reading of amendments to Board Policy regarding the use of facilities in competition with the private sector.
June 2016	Board denied the requests from Boise State University and University of Idaho to expand alcohol service in conjunction with NCAA Football games beyond what is currently allowed in Board Policy I.J.

APPLICABLE STATUTE, RULE, OR POLICY

Idaho State Board of Education Governing Policies & Procedures, Section I.J – Use of Institutional Facilities and Services With Regard to the Private Sector
Idaho Administrative Code, IDAPA 08.01.08 – 100., Possession, Consumption, and Sale of Alcoholic Beverages at Public Higher Education Institutions.
Idaho Administrative Code, IDAPA 38.04.07 – 305, Food and Beverage

BACKGROUND/DISCUSSION

Idaho Administrative Code, IDAPA 08.01.08.100 prohibits the sale, possession or consumption of alcoholic beverages in college or university owned, leased, or operated facilities and on campus grounds, except as provided in the State Board of Education Governing Policies and Procedures. Board Policy Section I.J. sets the provision by which alcohol may legally be sold or consumed in institution facilities.

Board Policy Section I.J. allows for the chief executive office to approve limit permits under specific conditions, including the requirement that the events be ticketed or by invitation only, food be provided at the event, the event cannot in conjunction with any student athletic event and "…the chief executive officer must ensure that the decisions to allow possession and consumption of alcoholic beverages are consistent with the proper image and the mission of the institution." Alcoholic beverages may also be allowed in conjunction with NCAA pregame football activities with prior Board approval under very specific conditions, including, but not limited to, there is limited access to the area through controlled access points, attendance is limited to those with a written invitation, and food must be available at the event.

The University of Idaho has brought forward a request to amend Board Policy I.J. to allow for the possession and consumption of alcohol in designated parting lots or limited areas on university grounds during home football games with prior Board approval. These designated "tailgating areas" would have limited access through controlled entry points and only game patrons and their guests "authorized" by the institution would be allowed to park and tailgate in these areas. Location, times and dates would be submitted to the Board for approval and would be limited between 10:00 am and 10:00 pm on the day of the game.

IMPACT

Approval of the proposed amendments would allow for the possession and consumption of alcohol during NCAA football games hosted by the institutions in select parking lots or other areas on campus designated as "tailgating areas."

ATTACHMENTS

Attachment 1 – Board Policy I.J. – First Reading Page 5

STAFF COMMENTS AND RECOMMENDATIONS

The proposed amendments expanding public areas where alcohol is allowed to include designated tailgating areas is outside of the institutions' mission for learning and public service. The draft language of the amendments proposed by the University of Idaho were provided to each of the institution's legal counsel for review. No comments from the other institutions were received at the time of agenda production.

In addition to the amendments proposed by the University of Idaho the attached draft includes an increase in the per instance liability limits from $500,000 to $1,000,000. This amendment would bring the policy in compliance with the minimum liability required by Risk Management for permitted events.

BOARD ACTION

I move to approve the first reading of proposed amendments to Board Policy Section I.J. as submitted in attachment 1.

Moved by _________ Seconded by _________ Carried Yes ____ No ___

Idaho State Board of Education
GOVERNING POLICIES AND PROCEDURES
SECTION: I. GENERAL GOVERNING POLICIES AND PROCEDURES
SUBSECTION: J. Use of Institutional Facilities and Services with Regard to the Private Sector **February 2014**

1. Use of Institutional Facilities and Services

   a. Consistent with education's primary responsibilities of teaching, research, and public service, the institutions, under the governance of the State Board of Education and Board of Regents of the University of Idaho (Board), have and will continue to provide facilities and services for educational purposes. Such services and facilities, when provided, shall be related to the mission of the institution and not directly competitive with services and facilities reasonably available from the private sector, unless said use is for the benefit of a specific educational program of the institution and the institution has received prior Board approval. In addition, the Board recognizes that the institutions have a role in assisting community and economic development in a manner that supports the activities of the private sector. To this end, cooperation with local, state, and federal agencies is encouraged. A short term rental or lease of facilities for private use is not prohibited.

   b. Priority and guidelines for use of institutional services and facilities is as follows:

      i. Institutionally sponsored programs and projects.

      ii. Community programs or projects of an educational nature where the services or facilities provided by the institutions are directly related to the teaching, research, or service mission of the institution.

      iii. Local, state, or federally sponsored programs and projects.

      iv. The institutions will maintain a list of special events, services and facilities provided in those special events, the sponsor's name, the date of the use, and the approximate number of persons attending. This list will be available for public inspection. Individual institutional policies should be adopted in accordance with this general philosophy and policy statement of the Board. To this end, a coordinated effort between the public and private sector is encouraged.

2. Possession, Consumption, and Sale of Alcohol Beverages at Institutional Facilities

   a. Board Administrative Rules IDAPA 08.01.08 provides requirements relative to alcoholic beverages on campus grounds. Said rules generally prohibit the possession or consumption of alcoholic beverages in areas open to and most commonly used by the general public on campus grounds. The rules authorize the Board to waive the prohibition pursuant to Board policies and procedures. 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 this policy. The grant of any such waiver shall be determined by the chief executive officer ("CEO") only in compliance with this Policy and in accordance with the provisions set forth herein, and not as a matter of right to any other person or party, in doing so, the chief executive officer must ensure that the decisions to allow possession and consumption of alcoholic beverages are consistent with the proper image and the mission of the institution.

b. Each institution shall maintain a policy providing for an institutional Alcohol Beverage Permit process. For purposes of this policy, the term "alcoholic beverage" shall include any beverage containing alcoholic liquor as defined in Idaho Code Section 23-105. Waiver of the prohibition against possession or consumption of alcoholic beverages shall be evidenced by issuance of a written Alcohol Beverage Permit issued by the CEO of the institution which may be issued only in response to a completed written application therefore. Staff of the State Board of Education shall prepare and make available to the institutions the form for an Alcohol Beverage Permit and the form for an Application for Alcohol Beverage Permit which is consistent with this 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. An Alcohol Beverage Permit may only be issued to allow the sale or consumption of alcoholic beverages on public use areas of the campus grounds provided that all of the following minimum conditions shall be met. An institution may develop and apply additional, more restrictive, requirements for the issuance of an Alcohol Beverage Permit.

i. An Alcohol Beverage Permit may be granted only for a specifically designated event (hereinafter "Permitted Event"). Each Permitted Event shall be defined by the activity planned, the area or location in which the activity will take place and the period of time during which the activity will take place. The activity planned for the Permitted Event must be consistent with the proper image and mission of the institution. The area or location in which the activity will take place must be defined with particularity, and must encompass a restricted space or area suitable for properly controlling the possession and consumption of alcoholic beverages. The time period for the activity must be a single contiguous time period for a separate defined occurrence (such as a dinner, a conference, a reception, a concert, a sporting competition and the like). An extended series of events or a continuous activity with no pre-determined conclusion shall not be a Permitted Event. The area or location of the Permitted Event, the restricted space or area therein for possession and consumption of alcoholic beverages and the applicable time periods for the Permitted Event must each be set forth in the Alcohol Beverage Permit and in the application therefore.

ii. The serving of alcoholic beverages must be part of a planned food and beverage program for the Permitted Event, rather than a program serving alcoholic beverages only. Food must be available at the Permitted Event. Consumption of alcoholic beverages and food cannot be the sole purpose of a Permitted Event.

iii. Non-alcoholic beverages must be as readily available as alcoholic beverages at the Permitted Event.

iv. A Permitted Event must be one requiring paid admission through purchase of a ticket or through payment of a registration fee, or one where admission is by written, personal invitation. Events generally open to participation by the public without admission charges or without written personal invitation shall not be eligible for an alcoholic beverage permit. Only persons who have purchased a ticket or paid a registration fee for attendance at a Permitted Event, or who have received a written invitation to a Permitted Event, and who are of lawful age to consume alcoholic beverages, will be authorized to possess and consume alcoholic beverages at the Permitted Event.

v. Permitted Events which are generally open to the public through purchase of a ticket (such as sporting events, concerts or other entertainment events) must set out a confined and defined area where alcoholic beverages may be possessed and consumed. For such events, the defined area where alcoholic beverages may be possessed and consumed shall be clearly marked as such, and shall be separated in a fashion that entry into the area and exit from the area can be controlled to ensure that only those authorized to enter the area do so and that no alcoholic beverages leave the area. Only those individuals lawfully attending the Permitted Event who are of lawful age to consume alcoholic beverages may be allowed into the defined area, provided that such individuals may be accompanied by youth for whom they are responsible, but only if such youth are, at all times, under the supervision and control of such individuals. For such events there shall be sufficient space outside of the area where alcoholic beverages may be possessed and consumed to accommodate the participating public who do not wish to be present where alcoholic beverages are being consumed.

vi. No student athletic events, (including without limitation NCAA, NIT, NAIA and intramural student athletic events) occurring in college or university owned, leased or operated facilities, or anywhere on campus grounds, shall be Permitted Events, nor shall a Permitted Event be allowed in conjunction with any such student athletic event.

vii. An Alcohol Beverage Permit for a Permitted Event to which attendance is limited to individuals who have received a personal written invitation, or to those who have registered to participate in a particular conference (for example, a reception, a dinner, an exclusive conference) may allow alcoholic beverages to be possessed and consumed throughout the area of the event, provided that the area of the event is fully enclosed, and provided further that the area of the event must be such that entry into the area and exit from the area can be controlled to ensure that only those authorized to enter the area do so and that no alcoholic beverages leave the area. Additionally, the area of the Permitted Event must not be open to access by the general public, or to access by persons other than those properly participating in the Permitted Event.

viii. Application for an Alcohol Beverage Permit must be made by the organizers of the event. Such organizers must comply with all applicable laws of the State of Idaho and the local jurisdiction with respect to all aspects of the event, including the possession sale and consumption of alcoholic beverages.

ix. The Alcohol Beverage Permit, any required local catering permit, and applicable state or local alcoholic beverages permits shall be posted in a conspicuous place at the defined area where alcoholic beverages are authorized to be possessed and consumed.

x. The sale, service and consumption of alcoholic beverages at a Permitted Event shall be confined to the specific event, area or activity identified on the Beverage Permit application. Any alcoholic beverages allowed at a Permitted Event shall be supplied through authorized contractors of the organizers (such as caterers hired by the organizers). In no event shall the institution supply or sell alcoholic beverages directly. In no event shall the general public or any participants in a Permitted Event be allowed to bring alcoholic beverages into a Permitted Event, or leave the defined area where possession and consumption is allowed while in possession of an alcoholic beverage.

xi. The person/group issued the Beverage Permit and the contractors supplying the alcoholic beverages shall assume full responsibility to ensure that no one under the legal drinking age is supplied with any alcoholic beverage or allowed to consume any alcoholic beverage at the Permitted Event. Further, the person/group must provide proof of insurance coverage, including host liquor liability and liquor legal liability, in amounts and coverage limits sufficient to meet the needs of the institution, but in no case less than $1,~~5~~000,000 minimum coverage per occurrence. Such insurance must list the permitted person/group, the contractor, the institution, the State Board of Education and the State of Idaho as additional insured's, and the proof of insurance must be in the form a formal endorsement to the policy evidencing the coverage and the required additional insured's.

xii. The Alcohol Beverage Permit shall set forth the time at which sale, service, possession and consumption of alcoholic beverages will be permitted, which times shall be strictly enforced. Service and sale of alcoholic beverages shall stop at a time in advance of the time of closure of the event sufficient to allow an orderly and temperate consumption of the balance of the alcoholic beverages then in possession of the participants of the event prior to closure of the event.

xiii. These guidelines shall apply to both institutional and non-institutional groups using institutional facilities.

c. The sale or consumption of alcoholic beverages on campus grounds in conjunction with NCAA football games may be permitted with prior Board approval. Each year an institution that wishes to seek Board approval must present a written proposal to the Board, at the Board's regularly scheduled June Board meeting, for the ensuing football season. The proposal must include detailed descriptions and drawings of the areas where events which will include alcohol service will occur. The Board will review the proposal under the following criteria and, upon such review, may also apply further criteria and restrictions in its discretion. An institution's proposal shall be subject to the following minimum conditions:

i. The area must be for sponsors to entertain clients/guests for home football games. Attendance is limited to adult patrons and guests who have received a personal written invitation and must not be open to access by the general public.

For pre-game events held in institution stadium suite areas, only patrons who hold tickets to seats in the area shall be allowed into the area during games.

ii. The event must be conducted during pre-game only, no more than three-hours in duration, ending at kick-off.

For events held in institution stadium suite areas, the sale of alcohol must begin no sooner than three hours prior to kick off and must end at the start of the 4th quarter to allow for an orderly and temperate consumption of the balance of the alcoholic beverages then in possession of the participants of the game prior to the end of the game.

iii. The event must be conducted in a secured area surrounded by a fence or other methods to control access to and from the area. There must be no more than two entry points manned by security personnel where ID's are checked and special colored wrist bands issued. A color-coded wrist band system must identify attendees and invited guests, as well as those of drinking age. Unless otherwise specifically approved annually by the Board, under such additional terms and conditions as it sees fit, no one under the legal drinking age shall be admitted into the alcohol service and consumption area of an event. The area shall be clearly marked and shall be separated in a fashion that entry into the area and exit from the area can be controlled to ensure that only those authorized to enter the area do so and that no alcoholic beverages leave the area.

For events held in institution stadium suite areas adult patrons may be accompanied by youth for whom they are responsible, but only if such youth are, at all times, under the supervision and control of such adult patrons.

iv. Companies involved in the event must be sent a letter outlining the location and Board alcohol policy. The letter must state the minimum drinking age in Idaho is 21 and that at no time should such companies allow any underage drinking and/or serving of alcohol to visibly intoxicated persons.

v. Alcohol-making or -distributing companies are not allowed to sponsor the event. In no event shall the institution supply or sell alcoholic beverages directly. In no event shall invitees or participants in such event be allowed to bring alcoholic beverages into the area, or leave the defined area where possession and consumption is allowed while in possession of an alcoholic beverage.

vi. The food provider must provide TIPS trained personnel who monitor the sale and consumption of all alcoholic beverages to those of drinking age. Any required local catering permit, and applicable state or local alcoholic beverage permits, shall be posted in a conspicuous place at the defined area where alcoholic beverages are authorized to be possessed and consumed.

vii. Food must be available at the event. Non-alcoholic beverages must be as readily available as alcoholic beverages.

viii. Security personnel located throughout the area must monitor all alcohol wristband policies and patron behavior.

ix. Event sponsors/food providers must be required to insure and indemnify the State of Idaho, the State Board of Education and the institution for a minimum of $2,000,000, and must obtain all proper permits and licenses as required by local and state ordinances. All applicable laws of the State of Idaho and the local jurisdiction with respect to all aspects of the event, including the possession, sale and consumption of alcoholic beverages, must be complied with. Event sponsors/food providers supplying the alcoholic beverages shall assume full responsibility to ensure that no one under the legal drinking age is supplied with any alcoholic beverage or allowed to consume any alcoholic beverage at the event. Further, event sponsors/food providers must provide proof of insurance coverage, including host liquor liability and liquor legal liability, in amounts and coverage and coverage limits sufficient to meet the needs of the institution, but in no case less than $1,~~5~~000,000 minimum coverage per occurrence. Such insurance must list the event sponsor/food provider, the institution, the State Board of Education and the State of Idaho as additional insureds, and the proof of insurance must be in the form of a formal endorsement to the policy evidencing the coverage and the required additional insureds.

x. A report must be submitted to the Board annually after the conclusion of the football season before consideration is given to the approval of any future requests for similar events on home football game days.

d. In addition to the Institution sponsored game-day events described in c. above, the CEO of each institution may designate (subject to annual board approval) specific parking lots or limited areas of university grounds with controlled access as tailgate areas for home NCAA football games or NCAA bowl games hosted by the institution. Only game patrons authorized by the institution will be allowed to park and tailgate in the designated tailgate areas with their private guests. Locations, times and dates will be submitted to the Board for approval.

Within tailgate areas, authorized game patrons and their private guests may consume alcohol as long as they abide by all local and state regulations governing alcohol usage including, but not limited to, minor in possession or consumption of alcoholic beverages and public intoxication. Alcohol consumption in tailgating areas shall be limited to the times approved by the Board and at no time shall extend beyond 10:00am through 10:00pm of the day of each NCAA football game hosted by the institution. Alcohol beverages must be held in an opaque container that is not labeled or branded by an alcohol manufacturer or distributor. Alcohol may not be taken from the designated tailgate area into any other area.

The institutions shall not sell alcohol or serve alcohol in the tailgate area nor license or allow any vendor to sell or dispense alcohol in the tailgate area. Only private individuals authorized to be in the tailgate area may bring alcohol into the tailgate area for personal use by themselves and by their private tailgate guests. Each institution may place additional restrictions on activities in the tailgate area as seen fit to maintain order in the area.

Institution sponsored private game-day events at which alcohol may be served by the institution remain subject to the requirements set forth in c. above. Institutions will report to the Board regarding the tailgate area at the same time as they report to the Board regarding the private game-day events under Board Policy.

~~d~~e. The sale or consumption of alcoholic beverages on campus grounds in conjunction with NCAA football bowl games shall be permitted only with Board approval under the same conditions i. through x, as described in subsection c. above, except that the minimum amount of insurance/indemnification shall be $5,000,000.

~~e~~f. Within residential facilities owned, leased or operated by an institution, the CEO may allow the possession or consumption of alcoholic beverages by persons of legal drinking age within the living quarters of persons of legal drinking age. Consumption of alcohol shall not be permitted in the general use areas of any such residence facility. Possession of alcohol within the general use areas of a residential facility may only be done in a facility where consumption has been authorized by the CEO, and such possession shall be only as is incidental to, and reasonably necessary for, transporting the alcohol by the person of legal drinking age to living quarters where consumption is allowed. The term "living quarters" as used herein shall mean, and be limited to, the specific room or rooms of a residential facility which are assigned to students of the institution (either individually or in conjunction with another room mate or roommates) as their individual living space.

3. Alcohol-making or -distributing companies shall not be allowed to advertise goods or services on campus grounds or in any institutional facilities.

SUBJECT

Board Policy - Bylaws – Second Reading

REFERENCE

February 2014	The Board considered, but did not approve amendments to the Board Bylaws.
June 2014	Board approved the first reading of amendments to Board Policy – Bylaws.
October 2014	Board approved a first reading of the Board Bylaws, incorporating language outlining the purpose of the Athletic Committee.
February 2015,	Board approved the second reading of proposed changes to the Board Bylaws, incorporating the Athletic Committee.
June 2016,	Board approved the first reading of the Board Bylaws, amending the program approval sunset clause.

APPLICABLE STATUTE, RULE, OR POLICY

Idaho State Board of Education Governing Policies and Procedures - Bylaws

BACKGROUND/DISCUSSION

At the June 2016 Board meeting staff presented proposed amendments to the Board's Bylaws that would set a time limit of one year on Board approvals that were not acted on. Items that were not acted on within that period of time would need to be brought back to the Board for reconsideration. This process will allow for the Board to consider the action under current circumstances, rather than action being taken based on past circumstances that may no longer be relevant.

IMPACT

The proposed amendments would clarify the time period for which Board approval on a given item is relevant for and when items needed to be brought back to the Board for reconsideration.

ATTACHMENTS

Attachment 1 – Bylaws – Second Reading Page 3

STAFF COMMENTS AND RECOMMENDATIONS

Board policy Section III.G. Program Approval and Discontinuance contains a program approval sunset clause. Any program approved by the Board or the Executive Director must be implemented within five years or be brought back to the Board or Executive Director, as applicable, for re-approval before it can be implemented.

There were no changes between first and second reading, staff recommends approval.

BOARD ACTION

I move to approve the second reading of Board policy - Bylaws as submitted in Attachment 1.

Moved by __________ Seconded by __________ Carried Yes _____ No _____

Idaho State Board of Education

GOVERNING POLICIES AND PROCEDURES

SECTION: I. BYLAWS (Operational Procedures) ~~February 2015~~August 2016

A. Office of the State Board of Education

The Board maintains an Office of the State Board for the purpose of carrying out the administrative, financial, and coordinating functions required for the effective operation of the institutions and agencies under the governance of the Board. The staff of the Office of the State Board is under the direction of an executive director responsible directly to the Board.

B. Meetings

1. The Board will maintain a 12-month rolling meeting schedule. To accomplish this, the Board will, at each of its regularly scheduled meetings, update its 12-month rolling schedule of Board meetings, provided, however, that the Board by majority vote, or the Board president after consultation with Board members, may reschedule or cancel any meeting.

2. The Board may hold special meetings by vote of a majority of the Board taken during any regular meeting or by call of the Board president.

3. All meetings of the Board are held at such place or places as may be determined by the Board.

4. Actions that impact ongoing future behavior of agencies and institutions shall be incorporated into Board policy. Actions limited to a specific request from an institution or agency, if not acted on within one year of approval, must be brought back to the Board for reconsideration prior to action by the institution or agency. This requirement does not apply to program approval time limits.

C. Rules of Order

1. Meetings of the Board are conducted in accordance with controlling statutes and applicable bylaws, regulations, procedures, or policies. In the absence of such statutes, bylaws, regulations, procedures, or policies, meetings are conducted in accordance with the current edition of *Robert's Rules of Order Newly Revised*.

2. A quorum of the Board consists of five (5) Board members.

3. With the exception of procedural motions, all motions, resolutions, or other propositions requiring Board action will, whenever practicable, be reduced to writing before submission to a vote.

4. A roll-call vote of the Board is taken on all propositions involving any matters of bonded indebtedness; convening an executive session of the Board; or on any other action at the request of any Board member or upon the advice of legal counsel. The first voter is rotated on each subsequent roll-call vote.

D. Officers and Representatives

1. The officers of the Board include:
   a. A president, a vice president, and a secretary, who are members of the Board.
   b. An executive secretary, who is the state superintendent of public instruction.

2. The president, vice president, and secretary are elected at the organizational meeting for one (1) year terms and hold office until their successors are elected. Vacancies in these offices are filled by election for the remainder of the unexpired term.

3. Board representatives to serve on other boards, commissions, committees, and similar bodies are appointed by the Board president.

4. The executive director is appointed by and serves at the pleasure of the Board unless the contract of employment specifies otherwise. The executive director serves as the chief executive officer of the Office of the State Board of Education.

E. Duties of Board Officers

1. Board President
   a. Presides at all Board meetings, with full power to discuss and vote on all matters before the Board.
   b. Submits such information and recommendations considered proper concerning the business and interests of the Board.
   c. Signs, in accordance with applicable statutes and Board action, all contracts, minutes, agreements, and other documents approved by the Board, except in those instances wherein the Board, by its procedures, has authorized the Board president to designate or has otherwise designated persons to sign in the name of or on behalf of the Board.
   d. Gives prior approval for any official out-of-state travel of seven (7) days or more by Board members, institution heads, and the executive director.
   e. Subject to action of the Board, gives notice and establishes the dates and locations of all regular Board meetings.
   f. Calls special Board meetings at any time and place designated in such call in accordance with the Open Meeting Law.
   g. Establishes screening and selection committees for all appointments of agency and institutional heads.
   h. Appoints Board members to all standing and interim committees of the Board.
   i. Establishes the Board agenda in consultation with the executive director.
   j. Serves as chief spokesperson for the Board and, with the executive director, carries out its policies between meetings.

2. Vice President
   a. Presides at meetings in the event of absence of the Board president.
   b. Performs the Board president's duties in the event of the Board president's inability to do so.
   c. Becomes the acting Board president in the event of the resignation or permanent inability of the Board president until such time as a new president is elected.

3. Secretary
   a. Presides at meetings in the event of absence of the Board president and vice president.
   b. Signs, in accordance with applicable statutes and Board action, all minutes, contracts, agreements, and other documents approved by the Board except in those instances wherein the Board, by its procedures, has authorized or has otherwise designated persons to sign in the name of or on behalf of the Board secretary.

4. Executive Secretary
   The state superintendent of public instruction, when acting as the executive secretary, is responsible for:

   a. Carrying out policies, procedures, and duties prescribed by the Constitution of the State of Idaho and the *Idaho Code* or established by the Board for all elementary and secondary school matters.
   b. Presenting to the Board recommendations concerning elementary and secondary school matters and the matters of the State Department of Education.

5. Executive Director

   The executive director serves as the chief executive officer of the Board, as chief administrative officer of Office of the State Board of Education, and as chief executive officer of such federal or state programs as are directly vested in the State Board of Education. The position description for the executive director, as approved by the Board, defines the scope of duties for which the executive director is responsible and is accountable to the Board.

F. Committees of the Board

The Board may organize itself into standing and other committees as necessary. Committee members are appointed by the Board president after informal consultation with other Board members. Any such standing or other committee may make recommendations to the Board, but may not take any action, except when authority to act has been delegated by the Board. The Board president may serve as an ex-officio

member of any standing or other committee. The procedural guidelines for Board committees appear in the Board Governing Policies and Procedures.
For purposes of the bylaws, the University of Idaho, Boise State University, Idaho State University, Lewis-Clark State College, Eastern Idaho Technical College, the College of Southern Idaho the College of Western Idaho, and North Idaho College are included in references to the "institutions;" and Idaho Educational Public Broadcasting System, the Division of Vocational Rehabilitation, the Division of Professional-Technical Education, and the State Department of Education, are included in references to the "agencies."∗ An institution or agency may, at its option and with concurrence of the Board president, comment on any committee report or recommendation.

1. Planning, Policy and Governmental Affairs Committee

   a. Purpose

      The Planning, Policy and Governmental Affairs Committee is a standing advisory committee of the Board. It is responsible for developing and presenting recommendations to the Board on matters of policy, planning, and governmental affairs. The committee, in conjunction with the chief executive officers and chief administrators of the Board governed agencies and institutions, will develop and recommend to the Board future planning initiatives and goals. This committee shall also advise the Board on collaborative and cooperative measures for all education entities and branches of state government necessary to provide for the general supervision, governance and control of the state educational institutions, agencies and public schools, with the goal of producing a seamless educational system.

   b. Composition

      The Planning, Policy and Governmental Affairs Committee is composed of two (2) or more members of the Board, appointed by the president of the Board, who designates one (1) member to serve as the chairperson and spokesperson of the committee, and is staffed by the Board's Chief Planning and Policy Officer. The Planning, Policy and Governmental Affairs Committee may form a working unit or units, as necessary, to advise the committee. The chairperson presents all committee and working unit recommendations to the Board.

   c. Responsibilities and Procedures

∗ Definition provided for purposes of the Bylaws only. Recognizing the Board governance relationship varies with each of these entities, the intent in including representatives of each of the agencies and institutions as much as possible in the committee structure is to ensure proper and adequate representation, but is not intended to obligate or interfere with any other local boards or governing entities.

The Planning, Policy and Governmental Affairs Committee is responsible for making recommendations to the Board in the following general areas:

i. Long range planning and coordination;
ii. Initial discussions and direction on strategic policy initiatives and goals;
iii. Legislative proposals and administrative rules for Board agencies and institutions;
iv. Coordination and communication with the Governor, the Legislature, and all other governmental entities with regard to items of legislation, Board policy and planning initiatives;
v. Review and revision of Board policies, administrative rules and education-related statutes for consistency and compatibility with the Board's strategic direction;
vi. Reports and recommendations from the Presidents' Council and the Agency Heads' Council;
vii. Other matters as assigned by the Board.

At the direction of the Board President, any matter before the Board may be removed to the Planning, Policy and Governmental Affairs Committee for initial action or consideration.

The Planning, Policy and Governmental Affairs Committee may establish necessary procedures to carry out its responsibilities. Such procedures must be consistent with the Board's Governing Policies and Procedures. The Board's Chief Policy and Government Affairs Officer, under the direction of the chairperson, prepares the agenda for the Planning, Policy and Governmental Affairs Committee work that is under consideration at each meeting of the Board.

2. Instruction, Research and Student Affairs Committee

a. Purpose

The Instruction, Research and Student Affairs Committee is a standing advisory committee of the Board. It is responsible for developing and presenting recommendations to the Board on matters of policy and procedure concerning instruction, research and student affairs.

b. Composition

The Instruction, Research and Student Affairs Committee is composed of two (2) or more members of the Board, appointed by the president of the Board, who designates one (1) member to serve as chairperson and spokesperson of the committee, and is staffed by the Board's Chief Academic Officer. The Instruction, Research and Student Affairs Committee may appoint a working unit or units, as necessary, to advise the committee. One such working unit shall be the Council on Academic Affairs and Programs (CAAP), which shall be composed of the Board's Chief Academic Officer and the chief academic officers of the institutions and agencies. The chairperson presents all committee and working group recommendations to the Board.

c. Responsibilities and Procedures

The Instruction, Research and Student Affairs Committee is responsible for making recommendations to the Board in the following general areas:

i. Agency and institutional instruction, research and student affairs agenda items;
ii. Instruction, academic or professional-technical program approval;
iii. Instruction, academic or professional-technical program review, consolidation, modification, and discontinuance, and course offerings;
iv. Outreach, technology and distant learning impacting programs and their delivery;
v. Long-range instruction, academic and professional-technical planning;
vi. Registration of out-of-state institutions offering programs or courses in Idaho;
vii. Continuing education, professional development, workforce training, programs for at-risk populations, career guidance;
viii. Student organizations' activities and issues; and
ix. Other matters as assigned by the Board.

The Instruction, Research and Student Affairs Committee may establish necessary procedures to carry out its responsibilities. Such procedures must be consistent with the Board's Governing Policies and Procedures. The Board's chief academic officer, under the direction of the chairperson, prepares the agenda for the Instruction, Research and Student Affairs Committee work that is under consideration at each meeting of the Board.

3. Business Affairs and Human Resources Committee

a. Purpose

The Business Affairs and Human Resources Committee is a standing advisory committee of the Board. It is responsible for developing and presenting recommendations to the Board on matters of policy and procedures concerning business affairs and human resources affairs.

b. Composition

The Business Affairs and Human Resources Committee is composed of two (2) or more members of the Board appointed by the president of the Board, who designates one (1) member to serve as chairperson and spokesperson of the committee, and is staffed by the Board's Chief Fiscal Officer. The Business Affairs and Human Resources Committee may appoint a working unit or units, as necessary, to advise the committee. One such working unit shall be the Financial Vice Presidents council, which shall be composed of the Board's Chief Fiscal Officer and the chief financial officers of the institutions and agencies. The chairperson presents all committee recommendations to the Board.

c. Responsibilities and Procedures

The Business Affairs and Human Resources Committee is responsible, through its various working unit or units, for making recommendations to the Board in the following general areas:

i. Agency and institutional financial agenda items;
ii. Coordination and development of guidelines and information for agency and institutional budget requests and operating budgets;
iii. Long-range fiscal planning;
iv. Fiscal analysis of the following:

    1) New and expanded financial programs;
    2) Establishment, discontinuance or change in designation of administrative units;
    3) Consolidation, relocation, or discontinuance of programs;
    4) New facilities and any major modifications to facilities which would result in changes in programs or program capacity;
    5) Student fees and tuition; and
    6) Other matters as assigned by the Board.

The Business Affairs and Human Resources Committee may establish necessary procedures to carry out its responsibilities. Such procedures must be consistent with the Board's Governing Policies and Procedures. The Board's chief fiscal officer, under the direction of the chairperson, prepares the agenda for the Business Affairs and Human Resources Committee work that is under consideration at each meeting of the Board.

4. Audit Committee

   a. Purpose

      The Audit Committee is a standing committee of the Board. The Audit Committee provides oversight to the organizations under its governance (defined in Idaho State Board of Education, Policies and Procedures, Section I. A.1.) for: financial statement integrity, financial practices, internal control systems, financial management, and standards of conduct.

   b. Composition

      The Audit Committee members shall be appointed by the Board and shall consist of five or more members. Three members of the Committee shall be current Board members and at least two members shall be independent non-Board members who are familiar with the audit process and permanent residents of the state of Idaho. No employee of an institution or agency under the governance of the Board shall serve on the Audit Committee. Each Audit Committee member shall be independent, free from any relationship that would interfere with the exercise of her or his independent judgment. Audit Committee members shall not be compensated for their service on the committee, and shall not have a financial interest in, or any other conflict of interest with, any entity doing business with the Board, or any institution or agency under the governance of the Board. However, Audit Committee members who are Board members may be compensated for Board service. The Audit Committee may appoint a working unit or units, which could include the chief financial officers of the institutions and financial officers of the Board office.

      All members shall have an understanding of the Committee and financial affairs and the ability to exercise independent judgment, and at least one member of the Committee shall have current accounting or related financial management expertise in the following areas:

      i. An understanding of generally accepted accounting principles, experience in preparing, auditing, analyzing, or evaluating complex financial statements, and;
      ii. The ability to assess the general application of such principles in the accounting for estimates, accruals, and reserves, and;
      iii. Experience in preparing or auditing financial statements and;
      iv. An understanding of internal controls.

      Members may be reappointed. The Audit Committee chair shall be appointed by the Board President and shall be a Board member.

   c. Responsibilities and Procedures

It is not the Committee's duty to plan or conduct audits or to determine that the institution's financial statements are complete, accurate and in accordance with generally accepted accounting principles. Management of the applicable institutions and agencies shall be responsible for the preparation, presentation, and integrity of the financial statements and for the appropriateness of the accounting principles and reporting policies used. The following shall be the principle duties and responsibilities of the Committee:

i. Recommend the appointment and compensation to the Board of the independent auditors for Board action. Evaluate and oversee the work of the independent auditors. The Committee must approve any services prior to being provided by the independent auditor. The independent auditing firm shall report directly to the Committee as well as the Board and the auditor's "engagement letter" shall be addressed to the Committee and the President of each institution. The Committee shall have the authority to engage the Board's legal counsel and other consultants necessary to carry out its duties.
ii. Discuss with the independent auditors the audit scope, focusing on areas of concern or interest;
iii. Review the financial statements, adequacy of internal controls and findings with the independent auditor. The independent auditor's "management letter" shall include management responses and be addressed to the Audit Committee and President of the institution.
iv. Ensure the independent auditor presents the financial statements to the Board and provides detail and summary reports as appropriate.
v. Oversee standards of conduct (ethical behavior) and conflict of interest policies of the Board and the institutions and agencies under its governance including establishment of confidential complaint mechanisms.
vi. Monitor the integrity of each organization's financial accounting process and systems of internal controls regarding finance, accounting and stewardship of assets;
vii. Monitor the independence and performance of each organization's independent auditors and internal auditing departments;
viii. Provide general guidance for developing risk assessment models for all institutions.
ix. Provide an avenue of communication among the independent auditors, management, the internal audit staff and the Board.
x. Maintain audit review responsibilities of institutional affiliates to include but not limited to foundations and booster organizations.

The Audit Committee will meet as needed. The Committee may establish necessary procedures to carry out its responsibilities. Such procedures must be consistent with the Board's Governing Policies and Procedures. The Board's

Chief Fiscal Officer, under the direction of the chair, prepares the agenda for work that is under consideration at each meeting of the Board.

5. Athletics Committee

   a. Purpose

   The Athletics Committee is a standing advisory committee of the Board that reports through the Business Affairs and Human Resources Committee. It is responsible for developing and presenting recommendations to the Board on matters of policy and procedures concerning intercollegiate athletics.

   b. Composition

   The Athletics Committee is composed of two (2) or more members of the Board appointed by the president of the Board, who designates one (1) member to serve as chairperson and spokesperson of the committee, and is staffed by the Board's Chief Fiscal Officer. The Athletics Committee may appoint a working unit or units, as necessary, to advise the committee. One such working unit shall be composed of the institutions' Athletics Directors.

   c. Responsibilities and Procedures

   The Athletics Committee is responsible for making recommendations to the Board in areas including but not limited to:

   i. athletics director and coach contracts;
   ii. Athletics Department operating budgets;
   iii. Athletics Department reports on revenue, expenditures and student-athlete participation;
   iv. Athletics Department employee compensation reports;
   v. institutional National Collegiate Athletics Association (NCAA) Academic Progress Rate (APR) reports;
   vi. institutional Title IX gender equity reports;
   vii. athletics division or conference changes; and
   viii. institutional athletics sponsorship and media rights agreements;

   The Athletics Committee may establish necessary procedures to carry out its responsibilities. Such procedures must be consistent with the Board's Governing Policies and Procedures. The Board's chief fiscal officer, under the direction of the chairperson, prepares the Athletics Committee work for the Business Affairs and Human Resources Committee agenda that is under consideration at each meeting of the Board.

G. Committee Presentations

1. The agenda for each regular meeting of the Board shall be organized using the areas of responsibility provided for in regard to each permanent standing committee of the Board, as described in Subsection H above, with the exception of the Audit and Athletic Committee.

2. The Board member who is the chair of the permanent standing advisory committee and spokesperson shall present the agenda items in the area of the committee's responsibility. This presentation may include calling on institutional/agency representatives and/or other individuals. In the event of an absence or conflict with respect to the committee chairperson, the Board President may designate a substitute Board member or Board officer to present the agenda items.

H. Presidents' Council

1. Purpose

   The Presidents' Council convenes prior to each Board meeting to discuss and make recommendations, as necessary, on Board agenda items scheduled for Board consideration. The Presidents' Council may also choose or be directed by the Board to meet with the Agency Heads' Council for exchanges of information or to discuss projects of benefit to the entire system. The Presidents' Council reports to the Board through the Planning, Policy and Governmental Affairs Committee of the Board.

2. Composition

   The Presidents' Council is composed of the presidents of the University of Idaho, Idaho State University, Boise State University, Lewis-Clark State College, Eastern Idaho Technical College; and the presidents of North Idaho College, the College of Western Idaho and the College of Southern Idaho, each of whom has one (1) vote. One (1) of the voting members shall serve as chair of the Council, with a new chair selected each academic year such that the chair will rotate among the respective members, such that no two community college presidents' will hold a term in consecutive years. The administrator of the Division of Professional-Technical Education and the Board's Executive Director shall be ex-officio members of the Council.

3. Duties of the Chair

   The Chair:

   a. Presides at all Presidents' Council meetings with full power to discuss and vote on all matters before the Council;
   b. Establishes the Presidents' Council agenda in consultation with the Executive Director; and
   c. Maintains open communications with the Board on agenda matters through the Planning, Policy and Governmental Affairs Committee.

4. The Executive Director will communicate openly and in a timely manner with the Presidents' Council.

I. **Agency Heads' Council**

1. Purpose

   The Agency Heads' Council convenes as necessary to discuss and make recommendations on agenda items scheduled for Board consideration as well as other issues pertinent to the agencies. The Agency Heads' Council may also choose or be directed by the Board to meet with the Presidents' Council for exchanges of information or to discuss projects of benefit to the entire system. The Agency Heads' Council reports to the Board through the Planning, Policy and Governmental Affairs Committee of the Board.

2. Composition

   The Agency Heads' Council is composed of the chief administrators of Idaho Educational Public Broadcasting System, the Division of Vocational Rehabilitation, and the Division of Professional-Technical Education; and representatives from the State Department of Education. The Board's Executive Director shall serve as chair of the Council.

3. Duties of the Chair

   a. Presides at all Agency Heads' Council meetings;
   b. Establishes the Council's agenda in consultation with the Council's members; and
   c. Maintains open communications with the Board on agenda matters through the Planning, Policy and Governmental Affairs Committee.

SUBJECT

Idaho Indian Education Committee Bylaws

REFERENCE

December 6-7, 2007	The Board was provided an update on the Native American Higher Education Committee's progress.
June 20, 2008	The Board approved the Committee moving forward with scheduling future meetings with each of the Tribes and charged the Committee with reviewing how Board policy can meet the underserved need in the communities through advanced opportunities.
February 21, 2013	The Board approved the first reading of Board Policy I.P.
April 18, 2013	The Board approved the second reading of Board Policy I.P.
April 14, 2016	The Board approved the first reading of Board Policy I.P.
June 16, 2016	The Board approved the second reading of Board Policy I.P.

APPLICABLE STATUTE, RULE, OR POLICY

Idaho State Board of Education Governing Policies & Procedures, Section I.P. Idaho Indian Education Committee

BACKGROUND/DISCUSSION

The Idaho Indian Education Committee serves as an advisory committee to the State Board of Education (Board) and the State Department of Education (Department) on educational issues and how they impact opportunity, success, and access for Idaho's American Indian student population. The committee also serves as a vital communication connection for Idaho's American Indian tribes, the Board, and the Department.

Board Policy I.P outlines the role and purpose of the committee, committee structure, and terms of membership. The original Board policy contain some provisions that would normally be contained in a groups by laws. At the June 2016 Board meeting the Board approved removing these provisions from the policy and placing them in committee bylaws. The proposed bylaws incorporate these provisions as well as additional provisions to provide further guidance on operating procedures of the committee and responsibilities of staff support from both the Office of the State Board of Education and the Department.

IMPACT

Approval of the bylaws will provide the needed guidance to the Committee for its structure and operation of committee meetings.

ATTACHMENTS

STAFF COMMENTS AND RECOMMENDATIONS

At the March 4, 2016 Indian Education Committee meeting, the committee reviewed the bylaws and recommended approval with a few minor edits. The proposed bylaws are in compliance with Board policy I.P.

Board staff recommends approval.

BOARD ACTION

I move to approve the Indian Education Committee bylaws as submitted in attachment 1.

Moved by __________ Seconded by __________ Carried Yes _____ No _____

A. Meetings

1. The Committee holds at least four (4) regular meetings annually. A quorum of the Committee consists of eight (8) voting members with the option to poll absent members to reach 8 for a response within three (3) days. A quorum shall be present to conduct any official business.

2. Meeting locations shall be determined by the Committee.

B. Membership

Committee members must uphold the goals and objectives of the Committee and give adequate time and energy to the duties of membership. Decision making is a collective action and all members have a joint responsibility for decisions and actions.

C. Nominating Process

A letter of recommendation for representation of the appropriate entity shall be submitted to the Board of Education (Board) office and receive Board approval before an appointee may act in an official capacity of the Committee.

D. Voting privileges

A Committee member unable to attend a meeting either in person or by telephone conference may send a proxy in his or her place. The proxy will have full voting privileges upon receipt from the absent member of a written statement or a tribal resolution to the chair and staff. Notification must include name and position of proxy and a statement authorizing the proxy to act in the official capacity, including full voting rights, for the determined time period of the meeting, and the proxy has support for voting on behalf of the committee member. The proxy may not vote without this notification.

E. Duties of the Officers

1. The Chair

   a. Presides at Committee meetings, with full power to discuss and vote on all matters before the Committee.
   b. Submits such information and recommendations considered proper concerning the business and interests of the Committee.
   c. Subject to action of the Committee, gives notice and establishes the dates and locations of all regular Committee meetings.
   d. Calls special meetings of the Committee.

e. Appoints Committee members to all standing and interim working groups of the Committee.
f. Establishes the agenda in consultation with the staff support.
g. Provides communication to the public as chief spokesperson for the Committee in coordination with the Board and State Department of Education (Department) Communications officers.

2. The Vice Chair

a. Presides at meetings in the event of absence of the Council chair.
b. Performs the Council chair's duties in the event of the Council chair's inability to do so.
c. Becomes the acting Council chair in the event of the resignation or permanent inability of the Council chair until such time as a new chair is elected.

F. Duties of Staff Support

The staff will work to maintain effective communication among the Committee members, Department, Board office, Board, and key stakeholders. Staff will uphold appropriate organizational structure to carry out the work of the Committee. Staff will provide structure for the meetings, review the progress of the Committee's work, and identify areas of strengths and weaknesses.

1. Board Staff
Provide support to the Chair to carry out the purpose of the Committee. Report on relevant activities of the Board office and the Board. Provide the Board office and the Board of an overview of the Committee's work. Collaborate with the Department staff on communication, meeting details, and other items as necessary to the purpose and duties of the Committee.

2. Department Staff
Provide support to the Chair to carry out the purpose of the Committee. Report on relevant activities of the Department and appropriate key stakeholders. Provide the Superintendent of Public Instruction an overview of the Committee's work. Collaborate with the Program Manager on communication, meeting details, and other items as necessary to the purpose and duties of the Committee.

G. Administration of Committee Work

1. Special Committee assignments shall be designated at the discretion of the Board.

2. Coordination and collaboration of policies and procedures are conducted to maintain the integrity of the Board and the Department.

3. Dissemination of official committee information will go through the Board office and Department.

H. Adoption, Amendment, and Repeal of Bylaws

1. Bylaws and amendments must be approved by the Board before they are officially instituted by the Committee.

2. Recommendations for amendments or repeals of bylaws may be approved at any regular or special meeting of the Committee by a majority vote of the Committee, provided notice has been presented at the preceding meeting of the Committee.

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SUBJECT

Idaho Educator Pipeline Report

REFERENCE

August 2015	The Board approved a proposed rule reorganizing IDAPA 08.02.02 and discussed the miss-alignment of current certification practices with Idaho Administrative Code.
December 2015	The Board reviewed an initial Teacher Pipeline Report and requested additional data.

APPLICABLE STATUTE, RULE, OR POLICY

Sections 33-1201 -1207, Idaho Code
Idaho Administrative Code, IDAPA 08.02.02, Rules Governing Uniformity

BACKGROUND/DISCUSSION

In late 2014, as part of the of the Career Ladder subcommittee work on tiered certification, it was discovered that there were a number of current practices regarding teacher certification that were not in alignment with Idaho statute or Idaho Administrative Code. Idaho Code authorizes the State Board of Education (Board) to set the requirements for teacher certification, within specified minimum requirements. The more specific requirements are set by the Board are outlined in Administrative Code. In 2015 Board staff, working with State Department of Education staff, started looking at the practices that had developed over time and the current certification requirements to identify which areas of the administrative rules should be changed and which practices needed to be changed to be compliant with Administrative Code. At the same time Board staff started working on a comprehensive report that would help to quantify the teacher shortage in Idaho and identify areas of weakness within Idaho's teacher preparation pipeline.

The Board was presented with a first look at the data during the December 2015 Board meeting and at that time indicated additional data they would like to see in the final report. The attached report provides updated information for all previous data points and includes additional details regarding administrators, career technical teachers, and teacher candidate demographics.

IMPACT

The attached report will help to inform the Board of the health of Idaho's educator pipeline and start the discussion regarding next steps to address these issues.

ATTACHMENTS

Attachment 1 – Idaho Educator Pipeline Report, July 2016 Page 3

STAFF COMMENTS AND RECOMMENDATIONS

The Teacher Pipeline Report provides available data on Idaho's educator pipeline. Staff recommends the Board use the information included in the report to inform decisions regarding making changes to sections of Administrative Code related to certification (provided as a separate agenda item) and for long-term discussions about policies intended to prevent and address shortages in rural areas and specific content areas. It is clear from the data provided and working with various stakeholder groups that that there is no simple answer to addressing the availability of highly effective teachers across the state. It is clear from all stakeholder groups that there is a desire to maintain a high standard for our professional educators and that changes to the current educator certification requirements will not address the issues faced within Idaho or across the nation.

BOARD ACTION

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

Idaho Educator Pipeline Report (Revised July 2016)

Introduction

In December 2015, the Idaho State Board of Education was provided an initial Teacher Pipeline Report. Based on questions raised by members of the State Board of Education and research conducted by staff, this report is presented as a follow-up and expansion of that initial report. This report provides updated information for all previous data points and includes additional details regarding administrators, career technical teachers and administrators, and teacher candidate demographics.

Idaho Preparation Program Enrollment

On an annual basis, Idaho's approved educator preparation programs report their enrollment data to the state and federal government as part of Idaho's Title II report. Tables 1 and 2 outline the number of students enrolled in Idaho's educator preparation programs from 2008 to 2015. The data in Table 2 indicates the levels of enrollment at Idaho's public, private, and alternate programs. Tables 3, 4, and 5 provide demographic data (gender and ethnicity) of students enrolled in Idaho's educator preparation programs. The data provided is the most currently available data. The data used in Table 7 was last reported for the 2013-2014 school year.

Table 1: Total Preparation Program Enrollment (Statewide)[1]

2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15*
8393	8323	8161	6909	5833	5397	3065

Table 2: Preparation Program Enrollment, by Program Type[1]

Type	2008-09	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15*
Public	4230	4048	3805	2403	1756	1616	884
Private**	3569	3938	4030	4352	3782	3408	1692
Alternate	594	330	326	154	284	373	489

Enrollment by program type (public, private, alternate) only includes programs that have data for all available years and is not intended to be summed up across programs. The statewide totals for all programs in a given year is represented in Table 1: Total Enrollment

* Effective with the 2014-2015 report, staff at the Office of the State Board of Education worked with the institutions to agree on a clear and common definition for "enrolled" for Title II reporting. From 2014-2015 on, a student will be considered enrolled if he/she has completed a program admissions process with the institution OR if he/she has completed at least 60 credits and has declared education as a major. Because institutions were previously defining "enrolled" in various ways, the adjusted definition has resulted in reduced, but more accurate, program enrollment numbers.

** Prior to 2014-2015, the research/data management staff at one institution internally defined "enrolled" as any student who had declared education as a major, regardless of whether the student enrolled in any education coursework. The institution provided more accurate data for 2014-2015 and will work with the Office of the State Board of Education to correct previous years' data. As a result there is a large discrepancy in the prior year's data.

[1] Title II Reports, Idaho, 2015, 2014, 2013, 2012, 2011, 2010 (enrollment and completers data provided by the educator preparation programs; certification data provided by the Idaho State Department of Education)

Table 3: Preparation Program Enrollment, by Gender[1]

	2012-2013				2013-2014				2014-2015			
Public	**BSU**	**ISU**	**LCSC**	**UI**	**BSU**	**ISU**	**LCSC**	**UI**	**BSU**	**ISU**	**LCSC**	**UI**
Male	27%	21%	17%	31%	28%	21%	20%	24%	26%	22%	20%	25%
Female	73%	79%	83%	69%	72%	79%	80%	76%	74%	78%	80%	75%
Private	**BYU-I**	**CI**	**NNU**	**GFC**	**BYU-I**	**CI**	**NNU**	**GFC**	**BYU-I**	**CI**	**NNU**	**GFC**
Male	17%	21%	19%	27%	17%	25%	31%	N/A	18%	25%	29%	N/A
Female	83%	79%	81%	73%	83%	75%	69%	N/A	82%	75%	71%	N/A
All Programs	**2012-2013**				**2013-2014**				**2014-2015**			
Male	20.2%				20.7%				21.4%			
Female	79.8%				79.3%				78.6%			

Notes for Tables 3, 4, and 5:

- Percentages represent the proportion of students who reported that gender or race/ethnicity out of the total students who reported any gender or race/ethnicity. The denominator does not include enrolled students who did not report.
- Alternate programs are not required to report this information for Title II Reporting. Table 4 and 5 includes Teach for America-Idaho data (reflecting 14 enrolled candidates) for the 2014-2015 academic year in the All Programs totals, but do not include ABCTE data, as ABCTE did not report this data.
- N/A = Not applicable; this institution did not have an active educator preparation program in that year

Table 4: Preparation Program Enrollment, by Race/Ethnicity, All Programs[1]

All Programs	**2012-2013**	**2013-2014**	**2014-2015**
Hispanic / Latino (of any race)	5.9%	4.9%	5.3%
American Indian or Alaskan Native	0.8%	0.5%	0.4%
Asian	1.6%	1.1%	1.1%
Black or African American	0.6%	0.4%	0.2%
Native Hawaiian or Pacific Islander	0.6%	0.5%	0.5%
White	89.2%	86.6%	87.3%
2 or more races	1.4%	6.0%	5.1%

Table 5: Preparation Program Enrollment, by Race/Ethnicity, by Program[1]

	2012-2013				2013-2014				2014-2015			
Public	**BSU**	**ISU**	**LCSC**	**UI**	**BSU**	**ISU**	**LCSC**	**UI**	**BSU**	**ISU**	**LCSC**	**UI**
Latino (of any race)	9.1%	4.4%	4.3%	4.6%	9.7%	4.3%	2.1%	4.9%	6.1%	5.4%	3.4%	4.1%
American Indian / Alaskan Native	0.2%	0.4%	2.6%	0.5%	0.5%	0.4%	1.4%	0%	1.4%	0%	0%	0%
Asian	1.5%	0.8%	3.5%	1.0%	1.3%	0.4%	1.4%	0.3%	2.4%	0.8%	0.8%	0%
Black / African American	0.8%	0.8%	0%	0%	0.4%	0.4%	0%	0%	0.3%	0%	0.8%	0%
Native Hawaiian / Pacific Islander	0.3%	0%	0%	0.3%	0.4%	0%	0.7%	0%	0.7%	0%	0%	0%
White	85%	92%	90%	92%	80%	91%	94%	92%	86%	89%	95%	91%
2 or more races	3.5%	1.6%	0%	2.0%	7.7%	3.4%	0%	3.1%	3.4%	4.7%	0%	4.6%

Table 5 (continued)**: Preparation Program Enrollment, by Race/Ethnicity, by Program**[1]

	2012-2013				2013-2014				2014-2015			
Private	**BYU-I**	**CI**	**NNU**	**GFC**	**BYU-I**	**CI**	**NNU**	**GFC**	**BYU-I**	**CI**	**NNU**	**GFC**
Latino (of any race)	5.2%	18%	5.5%	0%	3.1%	19%	8.1%	N/A	3.5%	10%	13%	N/A
American Indian / Alaskan Native	1.0%	0%	0%	0%	0.4%	1.9%	0.7%	N/A	0.4%	0%	0%	N/A
Asian	1.6%	2.0%	1.1%	0%	1.2%	1.9%	0.7%	N/A	1.3%	0%	0.4%	N/A
Black / African American	0.6%	0%	0%	0%	0.4%	1.9%	0%	N/A	0.2%	0%	0.4%	N/A
Native Hawaiian / Pacific Islander	0.7%	0%	0.6%	0%	0.3%	0%	3.5%	N/A	.07%	0%	3.1%	N/A
White	90%	80%	90%	100%	88%	72%	83%	N/A	88%	88%	78%	N/A
2 or more races	0.8%	0%	2.7%	0%	6.5%	3.8%	3.9%	N/A	6.4%	2.1%	4.6%	N/A

Reasons for Enrollment Decreases

Staff of the Office of the State Board of Education requested feedback from the Idaho Association of Colleges of Teacher Education (IACTE), whose members include the Deans and Chairs of Idaho's Colleges and Departments of Education, regarding the reasons they believe enrollment in their programs is currently decreasing. IACTE members listed the following reasons, this information in anecdotal:

- Lack of financial return on investment and clear upward career and salary pathways within teaching
  - Students often have to take out student loans in order to complete their degrees, but educator salaries are inadequate
  - Competing service sector programs that have higher salaries (examples: nursing, social work, etc.)
- Due to the current teaching environment, teachers speak negatively about the profession and even discourage students from pursuing teaching
  - Media (nationally and locally) language towards teachers is perceived as negative and patronizing
  - School climate – teachers feel like they are constantly dealing with the impact of frequent policy changes and they do not express job satisfaction
  - Teacher preparation program requirements and length of time to finish
    - Desire for shorter pathways (such as alternate routes)

Candidate Quality

Given the preponderance of research demonstrating the impact that effective teachers have on their students, when considering the educator pipeline, it is important to consider not only whether we are attracting an adequate number of teachers, but whether we are attracting quality candidates into the profession. One of the challenges in attempting to answer this question is the difficulty in identifying and measuring the characteristics that increase an individual's likelihood of being an effective teacher. While Idaho has limited data to address this question, the following indicators may be a valuable beginning point for this discussion.

Table 6 (below) outlines the GPA required for admissions into Idaho's undergraduate educator preparation programs (as applicable), the median GPA of those accepted into programs, and the median GPA of those who complete the programs.

Table 6: Preparation Program GPA Requirements and Median GPAs[1]												
	2012-2013				2013-2014				2014-2015			
Public	**BSU**	**ISU**	**LCSC**	**UI**	**BSU**	**ISU**	**LCSC**	**UI**	**BSU**	**ISU**	**LCSC**	**UI**
GPA required for admission	3.00	2.75	2.75	2.75	3.00	2.75	2.75	2.75	3.00	2.75	3.00	2.75
Median GPA of accepted	3.35	3.32	3.44	3.53	3.40	3.38	3.38	3.33	3.41	3.48	3.38	3.33
Median GPA of completers	3.34	3.48	3.62	3.40	3.42	3.53	3.71	3.45	3.49	3.54	3.65	3.60
Private	**BYU-I**	**CI**	**NNU**	**GFC**	**BYU-I**	**CI**	**NNU**	**GFC**	**BYU-I**	**CI**	**NNU**	**GFC**
GPA required for admission	None	NR	2.75	NR	None	NR	2.75	N/A	None	NR	2.75	N/A
Median GPA of accepted	3.10	NR	3.60	NR	3.32	NR	3.33	N/A	3.32	NR	3.31	N/A
Median GPA of completers	3.24	NR	3.60	NR	3.57	NR	3.62	N/A	3.57	NR	3.63	N/A

Private and alternate programs are not requested but not required to provide admissions and GPA data for Title II reporting. The alternate programs are not included in Table 6 because neither ABCTE nor TFA-Idaho has reported the data at this time.

- NR = Not reported
- N/A = Not applicable; this institution did not have an active educator preparation program in that year

Preparation Program Completers

Through Title II reporting, educator preparation programs provide data regarding the number of students who complete their programs. Table 7 outlines the number of program completers at Idaho's public, private, and alternate programs from 2008 to 2015. Table 8 demonstrates the certificates that completers have been prepared for, while Table 9 clarifies the number of teachers prepared to teach by subject area.

Table 7: Preparation of Program Completers, by Program Type[1]							
Type	**2008-09**	**2009-10**	**2010-11**	**2011-12**	**2012-13**	**2013-14**	**2014-15**
Public	562	589	549	657	643	517	426
Private	540	532	517	519	539	477	386
Alternate	229	302	131	37	158	199	277
Totals (Statewide)	**1331**	**1423**	**1197**	**1213**	**1340**	**1193**	**1089**

Table 8: Teachers Prepared, by Certificate Type[1]			
Program and Certificate Type	**2011-12**	**2012-13**	**2013-14**
Public			
Elementary	75	98	156
Secondary	248	91	161
Exceptional Child	19	22	30
Early Childhood / ECSE Blended	15	10	14
Occupational Specialist (Limited or Advanced)	8	4	11
Interim (Alternate Authorizations)	0	0	15

Private			
Elementary	20	57	92
Secondary	113	45	69
Exceptional Child	0	4	0
Early Childhood / ECSE Blended	6	9	16
Occupational Specialist (Limited or Advanced)	3	1	1
Interim (Alternate Authorizations)	0	0	6
Alternate			
Elementary	30	4	24
Secondary	23	9	19
Exceptional Child	18	3	11
Early Childhood / ECSE Blended	0	2	0
Occupational Specialist (Limited or Advanced)	0	0	0
Interim (Alternate Authorizations)	0	1	3
Totals - All Programs			
Elementary	125	159	272
Secondary	384	145	249
Exceptional Child	37	29	41
Early Childhood / ECSE Blended	21	21	30
Occupational Specialist (Limited or Advanced)	11	5	12
Interim (Alternate Authorizations)	0	1	24

Table 9: Teachers Prepared, by Subject Area[1]

Program Type and Subject Area	2011-12	2012-13	2013-14	2014-15
Public				
Early Childhood	28	29	17	22
Elementary Education	300	239	189	183
Secondary Education	156	100	95	87
English, Language Arts, or Reading	100	67	101	85
Math	35	22	42	29
Science, Engineering, Technology	41	25	28	22
Special Education	47	37	32	43
Languages, Bilingual, or ESL	60	37	36	19
All Others	299	185	163	158
Private				
Early Childhood	62	53	56	45
Elementary Education	227	240	211	164
Secondary Education	270	293	239	165
English, Language Arts, or Reading	52	66	59	44
Math	37	35	34	25
Science, Engineering, Technology	36	24	14	21
Special Education	47	56	56	46
Languages, Bilingual, or ESL	42	53	34	26
All Others	210	180	144	86
Alternate				
Early Childhood	0	0	0	0
Elementary Education	15	74	101	105
Secondary Education	0	0	5	4

English, Language Arts, or Reading	4	17	23	35
Math	5	14	22	23
Science, Engineering, Technology	5	18	31	38
Special Education	2	39	44	52
Languages, Bilingual, or ESL	2	2	0	2
Other	7	13	12	38
Totals - All Programs				
Early Childhood	90	82	73	67
Elementary Education	542	553	501	452
Secondary Education	426	393	339	256
English, Language Arts, or Reading	156	150	183	164
Math	77	71	98	77
Science, Engineering, Technology	82	67	73	81
Special Education	96	132	132	141
Languages, Bilingual, or ESL	104	92	70	47
All Others	516	378	319	282

Certificated Educators

This section provides information regarding the numbers of educators issued certificates in Idaho. Table 10 outlines the numbers of individual teachers who received their initial Idaho certificate from 2009 to 2016 and indicates whether they were prepared through an in-state or out-of-state program. Table 11 provides data regarding the numbers of individuals issued new certificates in a given year, by certificate type. Table 12 indicates the number of Career Technical Education (CTE) certificates issued by CTE program area. Table 13 outlines new administrator certificates, while Table 14 clarifies all CTE Administrator certificates (new and renewal) issued in recent years.

Table 10: Teachers Certificated, by Program Location[2]

Program Location	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16 YTD
In-State Preparation	3725	2843	3271	4603	3249	3584	1171
Out-of-State Preparation	897	891	1000	1910	1681	1792	443

Table 11: Teachers Certificated, by Certificate Type[3]

Program and Certificate Type	2011-12	2012-13	2013-14	2014-15	2015-16 YTD
Public					
Elementary	939	1126	889	448	37
Secondary	781	860	670	374	35
Exceptional Child	191	201	161	85	12
Early Childhood / ECSE Blended	26	29	26	16	0
Limited Occupational Specialist	2	8	19	23	7
Standard Occupational Specialist	13	18	4	6	0
Advanced Occupational Specialist	19	26	2	4	0
Alternate: Content Specialist & Teacher to New	13	38	28	45	74

[2] Idaho State Department of Education, "IEA Public Records Request 2009-2015"
[3] Idaho State Department of Education, data, as provided for this report

Table 11(continued)**: Teachers Certificated, by Certificate Type**[4]					
Program and Certificate Type	**2011-12**	**2012-13**	**2013-14**	**2014-15**	**2015-16 YTD**
Private					
Elementary	61	209	179	94	20
Secondary	27	180	112	80	12
Exceptional Child	27	30	7	5	0
Early Childhood / ECSE Blended	12	15	15	13	7
Limited Occupational Specialist	0	1	2	3	5
Standard Occupational Specialist	0	3	1	0	0
Advanced Occupational Specialist	2	0	0	0	0
Alternate: Content Specialist & Teacher to New	0	9	7	10	36
Alternate					
Elementary	4	10	27	32	16
Secondary	1	13	25	34	4
Exceptional Child	2	8	12	11	6
Early Childhood / ECSE Blended	0	0	0	0	0
Limited Occupational Specialist	0	0	0	0	0
Standard Occupational Specialist	0	0	0	0	0
Advanced Occupational Specialist	0	0	0	0	0
Alternate: Content Specialist & Teacher to New	0	0	0	0	0
Totals - All Programs					
Elementary	1004	1345	1095	574	73
Secondary	809	1053	807	488	51
Exceptional Child	220	239	180	101	18
Early Childhood / ECSE Blended	38	44	41	29	7
Limited Occupational Specialist	2	9	21	26	12
Standard Occupational Specialist	13	21	5	6	0
Advanced Occupational Specialist	21	26	2	4	0
Alternate: Content Specialist & Teacher to New	13	47	35	55	110

Table 12: K-12 CTE Teachers, by Program Area[5]						
Certificate Type	**2009-10**	**2010-11**	**2011-12**	**2012-13**	**2013-14**	**2014-15**
Agriculture & Natural Sciences	17	10	14	30	26	20
Business Administration	18	5	1	5	3	3
Business Education	52	40	45	70	54	41
Business Technology	23	12	13	31	18	24
Family & Consumer Sciences	21	10	13	25	26	13
Health Professions	32	25	31	72	44	47
Marketing Education	38	30	25	47	38	32
Marketing Technology	23	12	13	30	18	24
Occupational Family & Consumer Sciences	14	9	13	24	24	13
Engineering & Technology Education	49	32	45	61	51	42
Skilled & Technical Trades	87	82	111	133	121	97

[4] Idaho State Department of Education, data, as provided for this report
[5] Division of Career Technical Education, data, as provided for this report

Table 13: New Administrator Certificates Issued, by Type[3]								
	2011-12		2012-13		2013-14		2014-15	
Certificate Type	Active	Not Active	Active	Not Active	Active	Not Active	Active	Not Active
Administrator	353	174	385	152	309	100	147	48
Career Technical Administrator	3	5	1	3	0	0	1	0

Table 14: All CTE Administrators Issued (New and Renewal)[4]						
Certificate Type	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15
Career Technical Administrator	3	0	3	4	2	1

Alternate and Provisional Authorizations

Idaho Administrative Code outlines several alternative routes to certification in addition to the approved non-traditional routes to certification (ABCTE and TFA). Alternate routes to certification are available through all approved programs, traditional and non-traditional, and are most commonly used by individuals who have worked in a field other than teaching and with to become a teacher. All educators pursuing these routes are issued Interim certificates. Tables 15, 16, and 17 provide details about the alternate authorizations issued by the Department of Education.

The Idaho Professional Standards Commission Annual Reports indicate that there were 154 Provisional Authorizations with a total of 163 endorsements/assignments issued during the 2013-2014 school year and a 149 Provisional Authorizations with 159 endorsements/assignments issued during the 2014-2015 school year. Table 15 provides details about the provisional authorizations issued to teachers and administrators.

In 2015, staff of the Office of the State Board of Education and the State Department of Education clarified that only the State Board of Education could issue provisional certificates. As a result, effective 2015-2016, the State Department of Education is not issuing provisional certificates. Thus, we anticipate that the number of provisional certificates issued will substantially decrease while Content Specialist Interim Certificates are likely to increase. The State Board of Education is authorized, in emergency situations, to grant a one year provisional certificate to an individual who does not meet any to the statutory or administrative code requirements.

Table 15: Provisional Authorizations by Endorsement / Subject Area[6]			
Category	Subject Area	2013-14	2014-15
Administrators			
	Superintendent	2	1
	School Principal	1	2
	Special Education Director	0	1
Teachers			
	Early Childhood	3	1
	Elementary Education	0	25
	Special Education	27	22

[6] Professional Standards Commission, Annual Reports, 2013-2014, 2014-2015

	Languages, Bilingual, or ESL	7	9
	Secondary Education		
	English, Language Arts, or Reading	9	12
	Math	18	20
	Science, Engineering, Technology	13	24
	All Other Secondary Endorsements / Subjects	36	32
Other			
	All Other Endorsements / Subjects	25	7

During the 2013-2014 school year, 39 Content Specialist alternate authorizations with 42 total endorsements/assignments were issued. In 2014-2015, 56 Content Specialist authorizations with 64 total endorsements/assignments were issued. Table 16 (below) details the Content Specialist alternate authorizations.

Table 16: Alternate Authorizations – Content Specialist by Endorsement / Subject Area[5]

Category	Subject Area	2013-14	2014-15
Administrators			
	Superintendent	0	0
	School Principal	0	0
	Special Education Director	0	0
Teachers			
	Early Childhood	0	0
	Elementary Education	6	16
	Special Education	8	9
	Languages, Bilingual, or ESL	1	8
	Secondary Education		
	English, Language Arts, or Reading	2	0
	Math	5	3
	Science, Engineering, Technology	4	7
	All Other Secondary Endorsements / Subjects	9	13
Other			
	All Other Endorsements / Subjects	7	6

During the 2013-2014 school year, 235 Teacher to New alternate authorizations with 242 total endorsements/assignments were issued. In 2014-2015, 230 Teacher to New authorizations with 244 total endorsements/assignments were issued.

Table 17: Alternate Authorizations – Teacher to New Certificate by Endorsement / Subject Area[5]

Category	Subject Area	2013-14	2014-15
Administrators			
	Superintendent	12	7
	School Principal	9	8
	Special Education Director	3	6
Teachers			
	Early Childhood	12	10

Table 17 (continued)**: Alternate Authorizations – Teacher to New Certificate by Endorsement / Subject Area**[5]			
Category	**Subject Area**	**2013-14**	**2014-15**
Teachers continued…			
	Elementary Education		
	All Subjects	10	7
	6-9 Endorsements	7	6
	Special Education	37	51
	Languages, Bilingual, or ESL	17	16
	Secondary Education		
	English, Language Arts, or Reading	4	8
	Math	24	26
	Science, Engineering, Technology	22	25
	All Other Secondary Endorsements / Subjects	50	38
Other			
	All Other Endorsements / Subjects	35	36

Teacher Certificates and Assignments

To better understand the landscape of Idaho's educator workforce, we examined the assignments (or roles) of those who hold active certificates in Idaho. Table 18 provides an overview of the number of individuals holding active and inactive certificates. Tables 19 through 22 provide details about individuals teaching outside of their certificated grade band or in an assignment without the appropriate endorsement. Tables 23 and 24 provide information about individuals holding 6/9 endorsements. No 6/9 endorsements currently exist in administrative code. Finally, Table 25 clarifies the assignments of individuals holding Exceptional Child (Special Education) certificates.

Table 18: Total Certificated Teachers[3]	
Situation	**Active, Certificated Individuals**
Hold an active Idaho teaching certificate	19,882
Hold an inactive Idaho teaching certificate	10,567
Total certificated individuals	30,449

Table 19: Teaching Outside of Certificated Grade Band[3]	
Situation	**Active, Certificated Individuals**
Do not hold a Secondary Certificate but have secondary assignments	600
Do not hold an Elementary Certificate but have elementary assignments	186

Table 20: Teaching Outside of Endorsement[3]			
Situation	**Yes**	**No**	**No %**
Endorsement matches qualifications of assignment(s)	44,610	1,292	2.81

Please note that the data in Table 20 is counts based on active assignments. Since an individual may have more than one assignment, this does not represent unduplicated counts of individuals.

Table 21: Teaching Outside of Endorsement – Top Assignments with Issues, by Percentage[3]

Assignment	Yes	No	No %
Life Skills (Gr. 9-12)	5	21	80.8%
Food and Nutrition (Gr. 9-12)	17	13	43.3%
Animal Production / Science (Gr. 9-12)	12	9	42.9%
Business Computer Applications (Gr. 9-12)	34	24	41.4%
Web Page Design (Gr. 9-12)	14	7	33.3%
Conceptual Physics (Gr. 9-12)	17	8	32.0%
Communications (Gr. 9-12)	19	8	29.6%
Marketing - Comprehensive (Gr. 9-12)	17	7	29.2%
Technical Math (Gr. 9-12)	35	13	27.1%
German 1 (Gr. 9-12)	25	9	26.5%
Zoology (Gr. 9-12)	52	16	23.5%
French 1 (Gr. 9-12)	47	14	23.0%
Foreign Language – Other (Gr. 9-12)	22	6	21.4%
Humanities / Humanities Survey (Gr. 9-12)	113	30	21.0%
Health Education (Gr. 9-12)	220	52	19.1%
Astronomy (Gr. 9-12)	55	13	19.1%
Child Development / Parenting (Gr. 9-12)	22	5	18.5%
Pre-Engineering Technology (Gr. 9-12)	28	6	17.7%
General Applied Mathematics (Gr. 9-12)	94	20	17.5%
World Geography (Gr. 9-12)	34	7	17.1%
Economics (Gr. 9-12)	185	38	17.0%

Table 22: Teaching Outside of Endorsement – Top Assignments with Issues, by Number[3]

Assignment	Yes	No	No %
Health Education (Gr. 9-12)	220	52	19.1%
Economics (Gr. 9-12)	185	38	17.0%
U.S. History (Gr. 9-12)	493	38	7.2%
U.S. Government – Comprehensive (Gr. 9-12)	319	37	10.4%
Biology (Gr. 9-12)	344	36	9.5%
Algebra I (Gr. 9-12)	461	34	6.9%
Physical Education (Gr. 9-12)	305	33	9.8%
English IV 12th Grade Level (Gr. 12)	290	31	9.7%
Humanities / Humanities Survey (Gr. 9-12)	113	30	21.0%
Physical Science (Gr. 9-12)	264	28	9.6%
Geometry (Gr. 9-12)	363	28	7.2%
English I 9th Grade Level (Gr. 9)	439	28	6.0%
English III 11th Grade Level (Gr. 11)	333	26	7.2%
Business Computer Applications (Gr. 9-12)	34	24	41.4%
English II 10th Grade Level (Gr. 10)	396	24	5.7%
Life Skills (Gr. 9-12)	5	21	80.8%

Table 22 (continued)**: Teaching Outside of Endorsement – Top Assignments with Issues, by Number**[3]			
Assignment	**Yes**	**No**	**No %**
General Applied Mathematics (Gr. 9-12)	94	20	17.5%
Spanish I (Gr. 9-12)	190	19	9.1%
World History – Comprehensive (Gr. 9-12)	201	19	8.6%
Public Speaking (Gr. 9-12)	222	19	7.9%
Algebra II (Gr. 9-12)	327	17	4.9%

Table 23: Teachers with a 6/9 Endorsement[3]	
Situation	**Active, Certificated Individuals**
Teachers with a Secondary Certificate who hold a 6/9 endorsement	41
Teachers with an Elementary Certificate only who hold a 6/9 endorsement	511
Teachers with an Other Certificate (non-Elementary, non-Secondary) who hold a 6/9 endorsement*	5
Teachers with both an Elementary Certificate and an Other non-Secondary Certificate who hold a 6/9 endorsement	66
Total Teachers with a 6/9 endorsement	623

*Non- Elementary or Secondary Certificates included in analysis: Early Childhood / Early Childhood Special Education (EC/ECSE) Blended, Standard Occupational Specialist, Advanced Occupational Specialist, Alternate Authorization Content Specialist, Alternate Authorization Teacher to New, Administrator, Pupil Personnel Services

Table 24: Teachers with 6/9 Endorsement with a High School Assignment[3]			
Teacher Certificate Details	**Teachers with Active Certificate**	**Teachers with Assignment Data**	**Teachers with HS Assignment (spanning grades 9-10 or 9-12)**
Teachers without a Secondary Certificate	582	539	54
Teachers with an Elementary Certificate only	511	472	39
Teachers with Elementary Certificate & Other, Non-Secondary Certificate	577	535	54

Table 25: Assignments of Special Education Certificated Individuals[3]		
Situation	**Number**	**Percent**
Individuals with an Exceptional Child Certificate who only teach special education	717	33%
Individuals with an Exceptional Child Certificate who teach both special education and have another assignment	552	26%
Individuals with an Exceptional Child Certificate who do not teach special education	884	41%
Total Individuals with an Exceptional Child Certificate	2153	

Teacher Certificates and Endorsements

Idaho Administrative Code outlines specific educator certificates and endorsements. While the certificates and endorsements outlined in Administrative Code have changed over time, data presented in the April 2016 Pipeline Report clearly revealed that active certificate holders have been issued (and likely renewed) certificates and endorsements that are outdated or non-existent. The State Department of Education will need to have an ongoing process of ensuring that certificates and endorsements are aligned to current rule when issued (first time or renewal) and to make adjustments, as needed, when certificates are renewed. In cases where the State Department of Education either issued an outdated certificate or endorsement or incorrectly entered the certificate/endorsement into their database, corrections will be made to the data.

Teacher Departures

To understand Idaho's teacher pipeline, it is critical to gather and analyze data regarding situations that create vacancies. Tables 27 and 28 summarize data provided by school districts to the Department of Education regarding teacher retirements and other reasons for departure.

Table 27: Teacher Retirements[2]

Type	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16 YTD
Retirement	345	179	306	306	302	294	177
Early Retirement	196	17	9	0	0	0	0

Table 28: Teacher Departures[2]

Type	2009-10	2010-11	2011-12	2012-13	2013-14	2014-15	2015-16 YTD
Leaving education profession	63	46	68	60	54	55	42
To work outside Idaho	124	52	86	68	98	116	59
Parent/family obligation or spousal transfer	62	25	52	37	39	41	10
Service in foreign country	0	1	2	0	0	0	0
Military	3	4	2	2	3	0	0
Returning to school	17	5	12	7	11	7	0
Leave of absence	64	605	98	100	88	112	41
Personal Reasons	311	160	279	274	334	342	162
Reduction in force	84	46	68	25	18	9	1
Involuntary Termination	95	13	27	33	45	53	21

District Feedback on Hard to Fill Positions

In October 2014, the Idaho Association of School Administrators (IASA) partnered with Dr. Patti Mortensen, Assistant Professor of School Psychology and Educational Leadership at Idaho State University, to send out electronic surveys to superintendents of 115 Idaho school districts regarding hiring and hard-to-fill positions. Superintendents from 68 school districts from all six regions responded to the survey, representing 59% of Idaho school districts.

In fall 2015, Dr. Mortensen conducted an additional round of surveys, again partnering with IASA to distribute them electronically to 115 Idaho school districts. 72 districts responded to the second survey, representing all regions of the state and 62% of all Idaho districts. Tables 29 and 30 (below) provide a summary of the results from Dr. Mortensen's 2014 and 2015 surveys.

Table 29: Summary of Superintendents' Survey on Hard-to-Fill Positions[7,8]

Survey Item	2014 Survey (2014-15 School Year Hiring)	2015 Survey (2015-16 School Year Hiring)
Districts contacted	115	115
Districts responded	68	72
Reported hiring teachers or specialists for the upcoming school year	66	68
Reported that qualified candidate pools for open teacher positions were "inadequate"	79% (52 districts)	83% (59 districts)

Table 30: Summary of Superintendents' Survey on Hard-to-Fill Positions[9,10]

Survey Item	2014 Survey (2014-15 School Year Hiring)	2015 Survey (2015-16 School Year Hiring)
Reported that qualified candidate pools for open specialist (school psychologists, speech and language therapists, etc.) positions were "inadequate"	83% (54 districts)	88% (59 districts)
Districts able to hire fully certified staff for all of their vacant positions	10 of 65 districts (15%)	11 of 70 districts (16%)
Reported that hiring teachers was "extremely challenging"	41 districts	41 districts
Reported "some challenges" in hiring teachers	23 districts	24 districts
Reported open teaching positions in math were the most difficult to fill	71% (47 districts)	71% (42 districts)
The top three types of teaching positions that were the most difficult to fill	Secondary (55 districts), Special Educ (45 districts), Elementary (30 districts)	Secondary (57 districts), Special Educ (45 districts), Elementary (37 districts)

Table 31: Options Districts Used to Fill Vacant Positions[7]

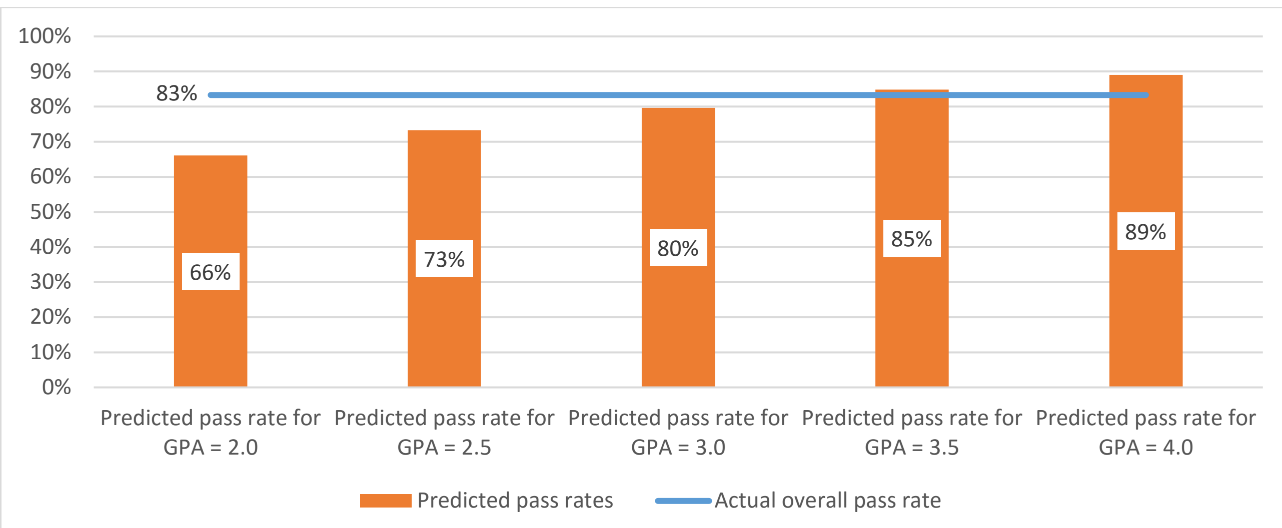
Option	# of Districts Reporting	Districts that Used Option Fall 2014	Districts that Used Option Fall 2015
Requested provisional authorization (1 year) for new hire(s)	64	54	58
Requested alternate authorization (3 years) for new hire(s)	68	54	58

[7] Mortensen, P. Idaho State University in partnership with Idaho Association of School Administrators. "The Impact of Teacher Shortages on Idaho Districts – Talking Points: Study Results for Fall 2014"
[8] Mortensen, P. Idaho State University in Partnership with Idaho Association of School Administrators. "The Impact of Teacher Shortages on Idaho Districts – Talking Points: Study Results for Fall 2015 (Year 2)"
[9] Mortensen, P. Idaho State University in partnership with Idaho Association of School Administrators. "The Impact of Teacher Shortages on Idaho Districts – Talking Points: Study Results for Fall 2014"
[10] Mortensen, P. Idaho State University in Partnership with Idaho Association of School Administrators. "The Impact of Teacher Shortages on Idaho Districts – Talking Points: Study Results for Fall 2015 (Year 2)"

Hired ABCTE prepared teacher(s) on alternate route to certification	68	44	53
Worked with educator preparation programs to hire student teacher(s)	63	31	31
Bought prep hours to cover needed sections	63	31	31
Increased class size and didn't hire	60	27	22
Started school with a substitute in hopes of filing position(s) later in the year	63	23	28
Cancelled classes and/or programs due to unfilled positions	59	22	17
Contracted specialist services w/ outside provider	61	28	35

The following chart demonstrates the correlation between a teacher candidate's GPA and the likelihood that he/she will pass the applicable Praxis test on the first try. The dataset includes candidates who were enrolled in an educator preparation program at one of Idaho's public institutions. The GPA data is the GPA of record (in the state longitudinal data system) as close to 60 accumulated credits as possible, in order to indicate the GPA of students at the time closest to their enrollment in the educator preparation program.

Due to the expansive amount of data included in the analysis, the correlation is statistically significant at a p value of 0.000. Thus even a slight difference in the likelihood of passing the Praxis on the first try would be considered statistically significant.



Conclusions

The process of gathering and analyzing the data for this report has clarified the limitations with the data that Idaho currently has available. While our capacity has improved with the state longitudinal data system, Idaho would benefit from identifying specific measures that we believe provide an accurate picture of the educator pipeline and establishing a strategy to effectively track them long-term. State Board of Education Staff will continue to work with the approved teacher preparation programs and the State Department of Education to assure that the data that is reported is consistently and accurately reported across the system. This will be particularly important in with data regarding individuals who hold certificates and the areas they are working in if we are going to be able to better identify the specific areas, both geographically as well as by subject, that are of the highest need and develop strategies for addressing these shortages. In addition to changes in data collection, additional surveys should be conducted in order to fully understand not only why individuals are choosing not to enter the teaching profession but to also develop strategies for increasing recruitment at the district level. The Office of Performance Evaluations conducted a study title “Workforce Issues Affecting Public School Teachers,” this report provides some additional insights on the difficulties school districts have in filling positions, this report is attached as Appendix A.

Based on the available statewide data, it appears that Idaho does not currently have a statewide shortage in all teaching grades and subjects. Rather, shortage issues are present in certain geographic and subject areas. Educator preparation program completion data and certification data indicates that the following subject areas have ongoing shortages: special education, math, secondary science (particularly chemistry and physics), bilingual and English Language Learner support, foreign languages, and some career technical education areas. Additionally, while regional data is not easily available, qualitative information from districts, educator preparation programs, and state staff indicates that shortages are common in rural areas beyond high need subject areas. Unfortunately, research on national and regional shortages reveals that the shortages identified in Idaho are the most common nationally. The higher pay scales commonly offered by districts in other states (particularly those in the Northwest and Mountain West region) further exacerbate the problem, as Idaho may lose teachers to other states. Additionally, some states are now offering incentives to attract educators to subjects and areas where shortages exist.

We continue to hear that teacher salaries are one of the areas that impacts an individual’s interest in entering the teaching field as well as in the retention of teachers. State funding for teacher salaries in Idaho is based on an apportionment model. Through the continued implementation of the career ladder Idaho will have significantly increased the funding going to school districts for teacher salaries by 2020. Due to the apportionment model, teacher salaries are set at the local district level, additional analysis will need to be done to show how the increase in salary based apportionment impacts the increase in salaries at the local level.

Idaho’s teacher shortage is not unique to Idaho. To address Idaho’s teacher shortage areas, staff recommends that the State Board of Education consider a multi-pronged approach. Through the implementation of the career ladder and the availability of funds for high need areas or teachers who take on leadership roles within their school districts, Idaho has taken a first step in addressing teacher salaries. Additional strategies will need to be developed to recruit and retain teachers in high need areas including our rural school districts, however, if the larger issue of why individuals are not entering the teaching profession is not addressed Idaho will continue to have a dwindling pool of individuals to choose from.

To improve recruitment and retention of teachers, it is important that Idaho build an environment and narrative statewide that clearly values teachers, their professionalism and expertise, and their voice. Additionally, efforts to ensure that educators receive strong mentoring and support during their careers, particularly in the early years of teaching will need to be strengthened. To fully address all of the areas that impact Idaho’s teacher pipeline a workgroup should be formed to look at various initiatives to address each area of the pipeline, from preparation to retirement and bring back recommendations, including implementation timelines, for consideration by the State Board of Education. Due to the widespread impact of a national teacher shortage many states have developed initiatives to try and address these shortages, these range from developing stronger partnerships between school districts and teacher preparation programs, the development of “grow your own” programs/partnerships, programs designed specifically for teachers for rural areas, to financial incentives. This group would look at the success of these programs in other states and the potential for success or adaptation in Idaho.

Workforce Issues Affecting Public School Teachers

Evaluation Report
January 2013

Office of Performance Evaluations
Idaho Legislature

Report 13-01

Created in 1994, the legislative Office of Performance Evaluations operates under the authority of Idaho Code §§ 67-457 through 67-464. Its mission is to promote confidence and accountability in state government through professional and independent assessment of state agencies and activities, consistent with legislative intent.

The eight-member, bipartisan Joint Legislative Oversight Committee approves evaluation topics and receives completed reports. Evaluations are conducted by Office of Performance Evaluations staff. The findings, conclusions, and recommendations in the reports do not necessarily reflect the views of the committee or its individual members.

2013–2014 Joint Legislative Oversight Committee

Senate	**House of Representatives**
Dean M. Mortimer, cochair	Shirley G. Ringo, cochair
Clifford R. Bayer	Maxine T. Bell
Elliot Werk	Gayle L. Batt
Les Bock	Elaine Smith

Rakesh Mohan, Director
Office of Performance Evaluations

Workforce Issues Affecting Public School Teachers

January 2013

Report 13-01

Office of Performance Evaluations
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Elliot Werk
Les Bock

Representatives
Shirley G. Ringo, cochair
Maxine T. Bell
Gayle L. Batt
Elaine Smith

January 3, 2013

Members
Joint Legislative Oversight Committee
Idaho Legislature

This report offers an independent, nonpartisan analysis of workforce issues that affect Idaho's public school teachers. Policymakers and education stakeholders can use the report as a starting point to inform their renewed efforts to reform public education in Idaho.

Recognizing that teachers, principals, and superintendents have firsthand knowledge and experience about their profession, we reached out to all of them for their perspectives. Our analysis of survey responses from 2,486 teachers, 256 principals, and 84 superintendents coupled with our analysis of the available data from the Department of Education form the basis for this report's findings and conclusions. At the end of each chapter in our report, we offer considerations for policymakers that we believe would benefit the current education reform debate.

We thank Idaho's teachers, principals, and superintendents for their participation in our survey. Without their cooperation and valuable input, this report would not have been possible. Formal responses from the Governor, the State Board of Education, and the State Superintendent for Public Instruction are included at the end of this report.

Sincerely,

Rakesh Mohan

Rakesh Mohan

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Exhibits

Executive Summary

Workforce Issues Affecting Public School Teachers

Our study of public school teachers answers a series of questions from legislators about teacher preparation, recruitment, retention, and other matters affecting the teacher workforce. The report includes (1) statistics from our analysis of data provided by the Department of Education, (2) results from our detailed surveys of superintendents, principals, and teachers, and (3) information drawn from our interviews with school district administrators, college of education officials, and state staff from various agencies.

Considerations for Policymakers

Legislators requested this study during the 2012 legislative session at a time when policymakers and the state's Superintendent of Public Instruction were in the midst of implementing a comprehensive education reform package. Since then, three referendums repealed the reform package and, as a result, policymakers and other education stakeholders have voiced their intentions to proceed with a more inclusive, more collaborative approach to implementing changes to the state's public school system.

Because the state is ready to move forward with a revised approach to K–12 education reform, our report is timely. Each chapter in the report closes with a brief discussion of the chapter's relevance to issues that policymakers are currently facing as they work with education stakeholders to improve Idaho's K–12 public schools.

Chapter 1: Teacher Profile and Class Size

We caution policymakers against relying on state-level summary statistics to understand class size. Instead, we suggest that policymakers would be better served by (1) studying class size at the district or school level, and then (2) examining other descriptive statistics in addition to an average, such as the range of class sizes and the factors that affect that range.

Chapter 2: Teacher Preparation

Even though superintendent and principal respondents to our survey generally felt that new teachers are prepared to teach, they identified the following three areas they would like to see improved in new teacher hires: (1) multiple certifications or endorsements to broaden what a new teacher is qualified to teach, (2) better classroom management skills, and (3) an increased ability to integrate technology into classrooms.

Chapters 3–5: Recruitment, Retention, Turnover, and Future Workforce Needs

An important theme throughout chapters 3–5 is the recruitment and retention challenges that districts and schools face and how those challenges may affect the quality and size of the teacher workforce. Chapters 3 and 4 detail K–12 public schools' struggles to recruit and retain qualified teachers, and chapter 5 discusses future workforce needs.

In our survey, superintendent and principal respondents across the state largely attributed their recruitment and retention struggles to teacher compensation packages. Additionally, results from our survey of teachers revealed a strong undercurrent of despair among teachers who seem to perceive a climate that disparages their efforts and belittles their contributions. The vast majority of comments from superintendents, principals, and teachers express concern or dissatisfaction with specific aspects of their work or, more broadly, with conditions surrounding the public education environment in Idaho.

These expressed concerns justifiably raise questions about the long-term availability of dedicated, quality teachers to serve the state's public school system. The general tone of dissatisfaction and sense of being underappreciated may present challenges to policymakers and directly affect the state's ability to ensure a steady supply of dedicated, highly effective teachers in all of Idaho's public schools.

Acknowledgements

We appreciate the cooperation and assistance we received from the following education stakeholders across the state: the State Board of Education, the Department of Education, local districts and their schools, the teacher education programs at Idaho's colleges and universities, Public Employee Retirement System of Idaho (PERSI), and the Department of Labor.

Maureen Brewer and Lance McCleve of the Office of Performance Evaluations conducted this study. Margaret Campbell copy edited and desktop published the report.

Dr. Kathleen Sullivan, visiting professor and former director of the Center for Educational Research and Evaluation at the University of Mississippi, conducted the quality control review.

Introduction

Legislative Interest

In March 2012 the Joint Legislative Oversight Committee approved a request from the Senate Education Committee to study a variety of issues affecting teachers employed in Idaho's K–12 public schools. The study request covered a range of topics from teacher recruitment and retention to new teacher preparation and class size.

The study scope in appendix A lists ten specific areas that legislators had questions about. The importance of studying each of the ten areas has been heightened because of factors such as the recent economic recession and current efforts to reform K–12 education.

Current Education Policy Environment

Three referendums, representing work completed during the 2011 and 2012 legislative sessions to reform public education, were placed on the November 2012 voting ballot. On November 6, voters rejected all three referendums.

After Idahoans voted down the package of laws known as Students Come First, education reform in the state has found itself at a new crossroads. Several state leaders and education stakeholders, including the governor and the president of the Idaho Education Association, have made comments about how they would like to see the state proceed. These comments offer examples of the agreement among various stakeholder groups that reform is necessary and desirable:

> "The people have spoken, so I'm not discouraged. That's how our system works. But it's important to remember that the public conversation that began almost two years ago isn't over—it's only begun. Our workforce, our communities and most of all our students still deserve better, and our resources are still limited. We offered these reforms not because we sought change for change's sake, but because change is needed to afford our young people the opportunities they deserve now and for decades to come. That's as true today as it was yesterday, so our work for a brighter and better future continues."—Governor Butch Otter[1]

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[1] The Spokesman-Review, Eye on Boise: http://www.spokesman.com/blogs/boise/2012/nov/07/otter-school-reform-public-conversation-isnt-over-its-only-begun/

> "This debate has been about what's best for the students, educators and Idaho's public schools… Now that the voters have spoken, it's up to us, the adults, to model…for our students how grownups with diverse views can come together and put their differences aside and go forward… I urge lawmakers and other elected leaders and policymakers to meet us at the table, to begin the conversation about what is best for Idaho's students and Idaho's schools. We believe that together we can be a model of reform for the nation."—Penni Cyr, President, Idaho Education Association[2]

Our study on K–12 education acknowledges the state's unique position of navigating a productive way forward after the failure of the referendums and offers policymakers nonpartisan insight into the perspectives of stakeholders—perspectives which have not previously been gathered. These perspectives, coupled with our data analysis, can help policymakers take advantage of the renewed opportunity to move in a direction that addresses stakeholders' concerns. Specifically, the report

This report provides policymakers nonpartisan information on issues relevant to the current K–12 policy environment.

- helps to inform the policy conversations that education stakeholders are seeking to have with decision makers, and
- outlines stakeholder perspectives on teacher preparation, recruitment, retention, turnover, and other issues.

Study Approach

Our study was not designed to be an evaluation of the set of laws represented on the ballot as Propositions 1, 2, and 3 or the efforts for or against the reform package. Neither the study request nor the study scope mentions K–12 education reform.

We designed the study to respond to questions posed by policymakers using available data. The Department of Education gathers and stores detailed district–, teacher–, and student-level data in its longitudinal data system. We set out to learn what that data says and what it can tell policymakers. Further, district and school personnel have expertise on, insight into, and opinions about their profession and the various issues in which policymakers are interested. We wanted to know what district and school personnel had to say and what they felt was important to communicate to policymakers.

[2] The Spokesman-Review, Eye on Boise: http://www.spokesman.com/blogs/boise/2012/nov/07/iea-chief-together-we-can-be-model-reform-nation/

Methodology

To meet our study objectives and thoroughly answer each of the questions posed by legislators, we completed the following tasks:

- Interviewed staff at the Department of Education.
- Analyzed data from the Department of Education's longitudinal data system. Our data analysis included a review of demographic statistics of the state's districts, schools, and teachers; an examination of teacher exit reasons (turnover); and an assessment of available data on class size.
- Interviewed the executive director of the Public Employee Retirement System of Idaho (PERSI).
- Analyzed teacher retirement data provided by PERSI.
- Interviewed staff from the Department of Labor.
- Reviewed workforce data provided by the Department of Labor.
- Interviewed officials from the colleges of education about their teacher education programs: Boise State University, Brigham Young University-Idaho, the College of Idaho, Idaho State University, Lewis-Clark State College, Northwest Nazarene University, the University of Idaho, and the University of Phoenix.[3]
- Interviewed a sample of school district administrators from ten districts across the state. We randomly sampled the districts after accounting for district size and geographic location.
- Before the November 6 vote on the referendums, we surveyed superintendents, principals, and teachers statewide about teacher recruitment, retention, turnover, preparation, and class size. Our survey methods are discussed in appendix B.

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[3] We did not interview George Fox University because, at the time of our interviews, the institution was phasing out its teacher education programs in Idaho. However, the university recently notified the Department of Education that they plan to have an active cohort beginning in fall 2014.

Report Organization

We have organized the report into five chapters and two appendices.

The report highlights the perspectives of stakeholders that we gathered through interviews and surveys.

- Chapter 1 has a brief profile of teachers and includes our review of K–12 class sizes. This review discusses the limitations inherent in ascertaining reliable figures for the average number of students per class.
- Chapter 2 provides an overview of the state's teacher education programs and the standards those programs must meet. The chapter also discusses district and school administrators' perceptions of the preparation levels of new teachers.
- Chapter 3 discusses teacher recruitment by outlining which teaching positions are the hardest to fill and describing the recruitment challenges that districts and schools face in trying to fill open teaching positions.
- Chapter 4 is a discussion of teacher retention and turnover and includes a description of teacher retirement benefits and trends.
- Chapter 5 offers policymakers context for and insight into the future needs of the K–12 teacher workforce.
- Appendix A is our study scope.
- Appendix B outlines our survey methods, limitations, and results.

Each chapter concludes with considerations for policymakers.

Unlike most studies our office publishes, the nature of this study did not lend itself to a set of recommendations. Rather, the report serves to help policymakers better understand the set of K–12 issues outlined in our study scope and, in doing so, outlines areas for policymakers' consideration at the end of each chapter.

Chapter 1
Teacher Profile and Class Size

This chapter introduces K–12 teachers in Idaho by describing the average teacher in terms of experience, education, and salary. The chapter then moves to a discussion of the distribution of teachers and students throughout the state in terms of class size.

Who Teaches in Idaho?

In academic year 2011–2012 the state employed approximately 16,500 instructional staff to educate more than 280,000 K–12 students in 115 districts and 43 charter schools. Approximately 7,000 instructional staff teach at the elementary level versus 8,500 at the secondary level.[1] Regardless of which type of school they teach in, teachers in Idaho average 13 years of total teaching experience, hold a bachelor's degree, and make approximately $43,000 per year.

Instructional Staff Years of Experience

Years of Experience	Percentage of Instructional Staff
0–2	14.2
3–5	13.8
6–10	18.3
11–20	29.8
21–30	17.7
More than 30	6.2

[1] The remaining 1,000 or so teachers teach in mixed-level schools.

Degrees Held by Instructional Staff

Type of Degree	Percentage of Instructional Staff
Associate’s	0.1
Bachelor’s	73.2
Master’s	24.9
PhD or EdD	1.0
Other	0.8

Average Teacher Salaries

The Legislature applies a formula called salary-based apportionment to calculate the amount of funds the state will provide districts to pay instructional staff salaries. Within the rules that define salary-based apportionment, the state has set a minimum salary that districts must pay a full-time instructional staff member. Currently, the minimum salary is $30,500 annually. We found that approximately 11 percent of full-time teachers are paid a salary near the state’s minimum.[2]

Although Idaho has set a minimum salary for full-time instructional staff, about 19 percent of Idaho’s teachers are not full time. Because part-time teachers generally receive a salary that is below the full-time minimum, we excluded them from our average salary calculations. For full-time teachers, the average salary is approximately $43,000. Exhibit 1.1 shows the distribution of teacher salaries by district size and level of experience.

In our review of full-time teacher salaries, we found that the average salary for teachers with less than five years of experience is about the same for all district sizes. However, the average salary for teachers with more than five years of experience is higher in medium, large, and very large districts than in small and very small districts.[3] The average teacher salary is a reflection of not only the average experience and education of full-time teachers statewide, but also at least two other variables:[4]

2 We defined full-time salaries near the state minimum as salaries ranging from $30,000 to $31,000.

3 For the purposes of this report, very large districts have a student enrollment greater than 15,000 (3 districts), large districts have an enrollment greater than 5,000 (9 districts), medium districts have an enrollment greater than 1,500 (23 districts), small districts have an enrollment greater than 500 (42 districts), and very small districts have an enrollment of 500 or less (81 districts). These figures include the state’s charter schools.

4 We did not control for factors such as the cost of living among districts in our analysis of teachers’ salaries. Therefore, our analysis should be interpreted as descriptive of differences in full-time teachers’ salaries with no judgment on the appropriateness of those differences.

Exhibit 1.1 Average Teacher Salaries by District Size and Level of Experience

District Size[a]	0–2 Years ($)	3–5 Years ($)	6–10 Years ($)	11–20 Years ($)	21–30 Years ($)	More Than 30 Years ($)	Average Salary by District Size ($)
Very large	31,011	32,250	37,867	47,756	52,572	55,183	41,846
Large	31,780	32,624	38,653	48,949	52,734	54,955	43,360
Medium	32,205	33,836	39,108	49,686	52,903	53,895	44,768
Small	31,502	32,084	36,076	44,577	48,142	49,639	41,111
Very small	32,477	32,471	35,612	43,794	47,968	47,068	40,410
Charter	32,425	34,569	39,932	47,881	53,391	54,942	41,626
Average salary by years of experience	31,825	32,867	38,155	47,917	51,680	53,070	42,873

Source: Office of Performance Evaluations' analysis of Department of Education data.

[a] Very large districts have a student enrollment greater than 15,000, large districts have an enrollment greater than 5,000, medium districts have an enrollment greater than 1,500, small districts have an enrollment greater than 500, and very small districts have an enrollment of 500 or less.

1. On average, teachers in larger districts are paid more than teachers in smaller districts.
2. The total number of teachers working in larger districts exceeds the total number of teachers working in smaller districts.

In our statewide survey of superintendents, principals, and teachers, we asked respondents to offer additional comments as they relate to teacher retention, recruitment, and turnover. Across respondent types, comments that related to low pay were made the most often—mentioned by nearly one-third of the 1,527 respondents who offered additional comments. An example follows:

> The average full-time teacher in Idaho makes approximately $43,000 per year.

> "Several of my coworkers have left because they can't afford to teach anymore. They have to get higher paying jobs. They were good teachers. It's very sad."

Chapters 3 and 4 discuss the recruitment, retention, and turnover issues related to salaries in further detail. In those chapters, superintendents, principals, and teachers offer their opinions on how salaries affect keeping highly qualified teachers in Idaho classrooms.

What Is the State's Average Class Size?

Legislators expressed interest in learning more about the distribution of students and teachers across the state, particularly as that distribution translates to class size. They articulated specific interest in knowing, on average, how many students are in a classroom at any one time and whether class size is markedly different among district sizes.

Class size, defined for the purposes of this report as the number of students in a classroom, can sometimes be confused with ratios that compare the total number of students in the state (280,000) to the total number of instructional staff (16,500). In Idaho, the statewide student-teacher ratio is approximately 17 to 1.

The average class size in the state is not the same as the state's student-teacher ratio.

The statewide student-teacher ratio does not necessarily reflect actual class sizes throughout the state, nor does it reflect an average statewide class size. In reality, factors other than the total number of students and the total number of teachers affect the differences in class size among districts and schools. The following list highlights a few examples of factors that affect the size of classes across the state:

- Most of the state funds received by districts are based on their average daily attendance. Average daily attendance drives the number of classrooms (support units) and the number of teachers per classroom (staff allowance).
- Districts and schools use their share of available funds (both state and local) in a way that results in wide variations in class size given the different levels and types of classes within districts and schools.
- Not every teacher teaches a class every period of the day. Teachers have planning periods and some teachers work only part time.
- Some classes have more than one teacher assigned to them.
- Some subjects traditionally have far fewer (or far more) students than other subjects.

The data currently available at the Department of Education does not easily lend itself to a reliable calculation of a statewide average class size or average class size by district size. To derive either of these types of average class size, we would have to analyze the daily schedule of approximately 16,500 teachers and 280,000 students using data that was not designed for this type of analysis. In the absence of suitable data, we surveyed principals and teachers across the state and asked respondents to write in their average class size (number of students per classroom teacher).

Our analysis of the survey results showed an average class size of 23.3 reported by teachers and an average class size of 25.4 reported by principals—for an overall average class size of approximately 24 students per classroom teacher. Overall, principals and teachers in larger districts reported a higher number of students per class than those in smaller districts.

Average Reported Class Size by District Size

District Size	Teacher Response of Class Size	Principal Response of Class Size
Very large	25	28
Large	24	26
Medium	23	26
Small	22	23
Very small	17	20

Concerns About Class Size

In open-ended comments at the end of our survey of teachers, 102 respondents expressed their concerns about increasing class sizes. An example of those responses is captured here:

> "My biggest concern is the larger class sizes. I can't be there for all my students and meet all their needs when I have so many. Please help us get the classroom sizes back down to 20–24 students."

Likewise, administrators in six of the ten districts we interviewed conveyed that class size is increasing, class size is a concern, or class size is a primary focus. To better inform the results of our interviews with district administrators, we asked respondents to our survey of superintendents and principals to offer their opinions about the degree to which class size is a concern for them in their role as administrators. Superintendent and principal respondents differed somewhat in their opinions, with more principals than superintendents stating that class size is a major concern.

Degree to Which Class Size Is a Concern

	Major Concern (%)	Somewhat of a Concern (%)	Not a Concern (%)
Superintendents (N = 84)	23.8	40.5	35.7
Principals (N = 254)	41.7	38.2	20.1
Average class size reported by principals[5]	28.2	25.2	19.6

[5] We did not ask superintendents to write in the average class size in their district.

Because we asked principals about the degree to which class size is a concern in their schools, we were able to compare the principals' level of concern about class size to the principals' reported average class size. For principals who said that class size is a major concern, the average reported class size is approximately 28 students. For principals who said that class size is not a concern, the average reported class size is approximately 20 students.

Principals who said that class size is somewhat of a concern reported an average class size of approximately 25—a number that is, on average, one student per class more than the statewide average reported in our survey.[6] If we extend the relationship between average class size and level of concern about class size to a statewide level, the statewide average class size of 24 students could be considered somewhat of a concern.

In our interviews, several district administrators discussed the use of one technique in particular as part of their efforts to keep class sizes at acceptable levels. That technique is to absorb positions at certain grade levels and shift them to other levels to meet class size goals. Generally, this technique sacrifices high school positions to either improve or maintain class sizes at the elementary level.

Class size is a concern for many district and school administrators.

At least two district administrators mentioned a specific commitment to keeping class sizes at lower grade levels from getting too big. However, when we broke down our teacher survey results by grade level, we found very little difference in class size. Respondents who teach elementary classes reported average class sizes that are about equal to those reported by respondents who teach high school classes.

Average Class Size by School Type

	Average Class Size	Number of Respondents
High School	23	677
Middle/junior high	25	415
Elementary	23	1,008

A district administrator pointed out to us that concerns about class size run on both sides of the spectrum—the ability not only to keep core and remediation classes at acceptable levels but also to maintain programs that generally have much smaller class sizes, such as advanced placement courses. In our interviews, one administrator mentioned having to cut some advanced learning opportunities at the secondary level. Another administrator discussed the difficulty of trying to keep electives which have low enrollment.

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6 The statewide average class size of 24 refers to the average class size reported by teachers and principals who responded to our survey. For the range of class sizes reported, see appendix B, pages 60 and 63.

Considerations for Policymakers

We advise against relying on state-level summary statistics to draw conclusions about class size. Data such as the state's student-teacher ratio or average class size may be an appropriate place to begin learning about or understanding the distribution of teachers and students; however, policymakers and stakeholders should recognize the limitations of such summary-level data. Because class size is sensitive to factors that can significantly vary among districts, we conclude that considering class size in terms of a statewide ratio, average, or average by district size is of little practical value.

For example, statewide ratios and averages do not capture the range of class sizes throughout school buildings. Two respondents to our principal survey describe the range of class sizes seen at their schools:

> "We have lost 8 teaching positions in four years; we do not have enough classes to offer. We have class sizes in the teens and others in the 40's…"

> "…With budget cuts some teachers' class sizes are large and others are quite small, depending on our staffing for subject areas."

As shown by the principals quoted here, class size can vary dramatically from class to class within the same school. For class size statistics to be useful to policymakers, those statistics should be considered in light of individual district (or even school) circumstances. If the state tracked average class size at such a level, policymakers would be able to compare year-to-year class size variations and better position themselves to determine causes and solutions for undesirable trends in class size.

Within the context of district– and school-level class size data, identifying differences resulting from factors such as available resources, grade level, and subject matter will help develop a more accurate and useful picture of class size variations. Policymakers will then be in a position to ascertain the degree to which those variations may warrant concern.

Chapter 2
Teacher Preparation

Teachers have a central role in the success of the state's education system; this chapter explains what steps are taken to review and approve programs that train teachers and explains what standards those programs are required to meet. The chapter also provides information about the level of preparedness of teachers who are new to the profession.

How Are Teacher Education Programs Reviewed and Approved?

Teacher education programs, also called teacher preparation or teacher training programs, prepare students to become certified teachers. In Idaho graduates of approved programs are eligible for a standard teaching certificate from the state.

Idaho Code grants the State Board of Education the authority to approve teacher education programs and directs the Professional Standards Commission (PSC), housed within the Department of Education, to conduct program reviews.[1] As part of the state's partnership with the National Council for Accreditation of Teacher Education (NCATE), the PSC conducts a full review of teacher education programs concurrently with NCATE every seven years.[2]

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1 The PSC consists of 18 members that serve three-year terms: a staff member from the Department of Education; a staff member of the Division of Professional-Technical Education; no less than seven certificated classroom teachers (including at least one teacher of exceptional children and at least one teacher in pupil personnel services); one representative from each of the following associations: the Idaho Association of School Superintendents, the Idaho Association of Secondary School Principals, the Idaho Association of Elementary School Principals, the Idaho School Boards Association, and the Idaho Association of Special Education Administrators; one representative from the education department of one of the private colleges; one representative from one of the community colleges; one representative from the education department of one of the public institutions of higher education; and one representative from the college of letters and sciences of one of the institutions of higher education.

2 The US Department of Education recognizes NCATE as an official accrediting body for teacher preparation institutions. NCATE and the Teacher Education Accreditation Council (TEAC) are in the process of merging to form the Council for the Accreditation of Educator Preparation (CAEP).

A national team from NCATE and a state team from the PSC conduct reviews by using national standards and the Idaho Standards for Initial Certification of Professional School Personnel. During the review, the teacher education programs must demonstrate the methods used to assess whether candidates for teacher certification have the appropriate knowledge, skills, and professional dispositions to be successful teachers.[3]

Each teacher education program in the state is required to meet state standards and pass on-site reviews.

In between national reviews, a state team conducts an interim review (not to exceed every third year) of state-specific core teaching requirements.[4] All teacher education programs are scheduled to have a state review by the 2014–2015 academic year in the following four areas of focus:

- Clinical Practice and Summative Performance Assessment: Teacher education programs should observe and evaluate preservice teachers using the Danielson Framework, adopted by the State Board of Education in 2010.

- Mathematics Common Core Instructional Shifts and Mathematical Thinking for Instruction (MTI): Teacher education programs should train preservice teachers on teaching methods in the Common Core Standards for Mathematics.

- English Language Arts (ELA) Common Core Instructional Shifts and Idaho Comprehensive Literacy Requirements: Teacher education programs should train preservice teachers on teaching methods in the Common Core Standards for English Language Arts. Preservice teachers in teacher education programs should also be offered courses that align with the Idaho Comprehensive Literacy Plan.

- Instructional Technology and Data Literacy: Teacher education programs should train preservice teachers on the technology competencies approved by the PSC and the State Board of Education in 2010.[5]

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3 NCATE expects teacher education programs to minimally assess two professional dispositions: fairness and the belief that all students can learn.

4 Before any on-site program review, the institution must develop and submit to the Department of Education a report that thoroughly explains how the program evaluates candidates' knowledge and performance of the national standards and state-specific requirements for certification.

5 A supplemental set of standards by the International Society for Technology in Education (ISTE) outlines best practices for the use of instructional technology. Also, more than one of the NCATE standards refer to the incorporation and inclusion of technology to foster student learning.

Teacher education programs must demonstrate whether candidates for certification meet or exceed standards. The state review determines whether the candidate assessment methods of the teacher education program demonstrate unacceptable, acceptable, or target performance for each standard.[6]

After a review of an institution's programs, the national team and the state team each develop a report. The state team's report (complete with recommendations) is submitted to the Standards Subcommittee of the PSC. The subcommittee reviews the report and makes recommendations about each program to the full PSC. The full PSC then considers the team's report and the subcommittee's recommendations and makes a recommendation to the State Board of Education to approve, conditionally approve, or deny the program. Final unit accreditation rests with NCATE once the board grants program approval.

Teacher Standards

As part of our effort to understand how teacher education programs prepare candidates for certification, we interviewed representatives of eight colleges of education about their programs.[7] During our interviews, many of the colleges explicitly stated that national standards and state requirements drive their programs' design and curriculum. Because the state regulates teacher education programs, the colleges must meet those standards and requirements.

> The state has the authority to ensure that teacher education programs prepare teachers in such a way that aligns with state goals.

NCATE Standards

NCATE organizes its standards for the accreditation of teacher education programs into six categories. The standards focus on how the institution prepares candidates for teacher certification:

1. Candidate knowledge, skills, and professional dispositions: Assessments indicate that candidates meet standards.

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[6] Criteria for the three determinations: (1) an unacceptable performance means evidence is not sufficiently comprehensive to demonstrate that candidates meet the standard, (2) an acceptable performance means evidence is sufficient to distinguish candidates who meet or exceed the standard from those candidates who do not, and (3) a target performance means that evidence shows that the program has a mature system of assessing candidates' knowledge and performance in a credible manner.

[7] We interviewed the four-year public institutions: Boise State University, Idaho State University, Lewis-Clark State College, and the University of Idaho. We also interviewed the four-year private and for-profit institutions: Brigham Young University-Idaho, the College of Idaho, Northwest Nazarene University, and the University of Phoenix.

2. Assessment system and unit evaluation: Programs have an assessment system that collects and analyzes data to evaluate and improve performance.

3. Field experience and clinical practice: Programs design, implement, and evaluate field experiences so that candidates can develop and demonstrate their knowledge, skills, and professional dispositions.

4. Diversity: Assessments indicate that candidates can demonstrate and apply proficiencies related to diversity.

5. Faculty qualifications, performance, and development: Program faculty are qualified and model best practices in scholarship, service, and teaching.

6. Unit governance and resources: Programs have the leadership, authority, budget, personnel, facilities, and resources to prepare candidates.

NCATE provides an explanation of each standard along with a rubric that describes criteria for meeting the performance requirements.

Idaho Standards for Initial Certification of Professional School Personnel

The state's standards, called the Idaho Standards for Initial Certification of Professional School Personnel, apply to all teacher certification areas. Every candidate for certification must demonstrate knowledge and performance of ten core standards regardless of the candidate's specific content area:

1. Knowledge of subject matter
2. Knowledge of human development and learning
3. Adapting instruction for individual needs
4. Multiple instructional strategies
5. Classroom motivation and management skills
6. Communication skills
7. Instructional planning skills
8. Assessment of student learning
9. Professional commitment and responsibility
10. Partnerships

Knowledge and performance statements accompany each standard. These statements serve as indicators to help determine whether a candidate has met the standards. Further, to become certified in a specific content area, a candidate must also meet any additional enhancement standards for that area. The enhancement standards detail further knowledge and performance criteria that describe what a candidate must know and be able to do. Evidence provided by each program that proves candidates are competent in each of these standards results in state approval of the teacher education program.

Department officials told us that in the past, Idaho's standards for initial teacher certification were primarily based on the number of credit hours and the content of courses completed. Over the past five years, Idaho has moved to standards that require an institution to recommend a candidate for certification based on what the candidate knows and is able to do—a combination of knowledge and performance.[8]

How Prepared Are New Teachers?

To understand district and school administrators' perceptions of new teachers' (0–2 years of experience) preparation to teach, we distributed a survey to all superintendents and principals in the state and asked them to share their opinions of new teachers. When asked whether new teachers are prepared to teach, the superintendent and principal respondents had similar answers. More than half of the respondents felt that most new teachers are prepared, and very few of the respondents felt that most new teachers are unprepared.

Degree to Which New Teachers Are Prepared to Teach

	Most Are Prepared (%)	Some Are Prepared, Others Are Not (%)	Most Are Unprepared (%)
Superintendents (N = 84)	57.1	41.7	1.2
Principals (N = 253)	56.5	39.9	3.6

Likewise, when asked about their level of satisfaction with new teachers, the answers provided by the superintendent and principal respondents aligned. Most of the superintendent and principal respondents indicated their overall satisfaction with new teachers. Very few of the superintendent and principal respondents expressed overall dissatisfaction.

Superintendents' and Principals' Overall Level of Satisfaction with New Teachers

	Satisfied (%)	Neither Satisfied nor Unsatisfied (%)	Unsatisfied (%)
Superintendents (N = 84)	70.2	25.0	4.8
Principals (N = 254)	70.1	26.8	3.1

8 The standards align with the Interstate Teacher Assessment and Support Consortium (InTASC) model developed by a subcommittee of the Council of Chief State School Officers (CCSSO).

Skills and Credentials of New Teachers

Superintendents and principals want new teachers to have multiple certifications or endorsements, better classroom management, and an increased ability to integrate technology.

Although in a different order, the superintendent and principal respondents to our survey indicated the same top three skills or credentials they would like to see increased in new teacher hires. Each group of respondents selected multiple certifications or endorsements, classroom management, and an ability to integrate technology most often. Superintendents would most like to see an increase in the number of new teacher hires with multiple certifications or endorsements, and principals would most like to see better classroom management.

Skills or Credentials of New Teachers That Superintendents and Principals Would Most Like to See Increased[9]

	Multiple Certifications or Endorsements (%)	Classroom Management (%)	Ability to Integrate Technology in the Classroom (%)
Superintendents (N = 84)	76.2	59.5	53.6
Principals (N = 255)	35.7	67.5	45.1

Multiple Certifications or Endorsements

More than 75 percent of the superintendent respondents to our survey indicated a need or preference for new teacher hires to have multiple certifications or endorsements. District administrators across the state reiterated this sentiment in our interviews with them. Administrators in three small districts emphasized the need for teachers with more than one endorsement to help fill either multiple part-time positions or hard-to-fill, full-time positions. Two administrators explain:

> "In small schools, the hard part is finding a teacher with more than one endorsement. A major in history and a minor in social studies doesn't open any doors. Quit sending us students with an earth science endorsement; they can only teach one class. I need teachers who can teach chemistry, physical science, and math."

> "Teachers with more than one endorsement are what we're really looking for. We need them to teach one subject for a couple hours a day. I tell kids to get double certified. You can't walk out with just science or just English."

9 Percentages do not sum to 100 because respondents could select more than one response.

In our interviews with the colleges of education, some mentioned the challenges inherent in students receiving multiple certifications or endorsements. For example, the state now requires students in elementary education programs to receive two endorsements.[10] To accommodate the new requirement while still ensuring students can graduate in four years, at least one college told us it has decreased the length of its elementary student teaching experience from a full year to one semester. The importance of field experiences like student teaching, especially as those experiences relate to better classroom management, are discussed later in this chapter.

Classroom Management

About 68 percent of the principal respondents and nearly 60 percent of the superintendent respondents said they would like to see better classroom management from new teacher hires. Learning effective classroom management skills takes place in the classroom, interacting with students. Administrators in four of the ten districts we interviewed mentioned the need for better classroom management but also acknowledged that getting in a classroom is the best way to gain classroom management skills—skills that either cannot be or are not learned in a university setting.

In our interviews with the colleges of education, every college spoke to the importance of field experience for preservice teachers. However, two colleges articulated challenges inherent in gaining those field experiences by specifically mentioning problems they face in placing student teachers. These two colleges expressed some concern about the effect of initiatives like pay for performance on placements for student teachers. They said that districts and schools are hesitating to take on student teachers and will have less incentive to do so because of the fear that student achievement will suffer with a student teacher in charge of classroom instruction rather than the veteran teacher.

Integrating Technology

About half of the superintendent and principal respondents said they would like to see an increased ability of new teacher hires to integrate technology into the classroom. In our interviews with district administrators, several of them mentioned new teachers' familiarity with technology and their willingness to use it but questioned whether the new hires were adequately trained to do so.
The colleges of education expressed a number of opinions about the use of technology and teaching in our interviews:

- Six colleges said they have specific coursework that focuses on the use of technology.

[10] The administrative rule was approved in April 2011. The colleges of education do not have to fully comply with the rule until fall 2013.

- Four colleges mentioned the challenges they face in offering an online teaching endorsement—primarily a lack of resources to establish the program or, even if the program was in place, trouble filling the seats available.

- Four colleges questioned whether the technology they train preservice teachers to use is even available in districts where students teach or start their careers.

- Three colleges said they understand the focus on technology, but challenges remain about how to train teachers on the use of technology and how to pay for the technology and necessary training.

- Two colleges mentioned the importance of not only showing preservice and inservice teachers how to use a technological device but also instructing teachers how to integrate that device into the classroom in such a way that improves student outcomes.

- At least two colleges require their preservice teachers to design electronic portfolios.

- One college suggested that learning how to integrate technology should be part of a teacher's professional development plan if an evaluation indicates the teacher needs to improve that skill.

No college we spoke with dismissed technology's increasing role in education. Rather, their comments to us offer policymakers insight into what factors may necessitate some consideration when deliberating policies involving technology's role in the classroom.

Considerations for Policymakers

One of the questions outlined in our study scope (located in appendix A) asks whether candidates for teacher certification are graduating from teacher education programs with the necessary skills. Given the information provided throughout this chapter, the answer is yes, in general terms, superintendents and principals feel new teachers are prepared. In addition, the state has the authority to adjust standards for teacher education programs to meet policymakers' goals.

Reviews conducted to assess whether and how well teacher education programs meet standards set by the state provide Idaho the opportunity to communicate anticipated changes with the colleges of education and adjust standards to meet evolving needs. We learned in our interviews that the deans of the colleges of education meet monthly. The uniqueness and importance of these meetings were mentioned in many of our interviews plus in conversations with Department of

Education staff. Everyone said that collaboration among the deans is very high. Although not hosted by the state, department staff attend the meetings to facilitate communication between the state and the teacher education programs.

Officials from one college of education told us that they did not know how to anticipate and prepare for a reform package they did not hear about until the 2011 legislative session when the state superintendent rolled out his plan. Changes to teacher education programs necessitate time and resources to implement. For this reason, the State Board of Education does not require the teacher education programs to meet new standards until two years after their initial approval.

Chapter 3
Recruitment

This chapter details issues of teacher recruitment. Positions that districts find hard to fill are discussed first. This discussion is followed by a description of the number of teachers who do not have a regular certification from the state but still fill a teaching position in one of the state's K–12 schools. The chapter then outlines challenges that superintendents and principals across the state face in trying to recruit teachers to their district or school.

What Are Districts' Hard-to-Fill Positions?

In our survey of superintendents and principals, we asked respondents to name their three hardest-to-fill positions. For both superintendent and principal respondents, the three positions most commonly identified as hard to fill were special education, math, and science. Likewise, in our interviews of district administrators, we found they most often named these same three positions.

Most Commonly Identified Hard-to-Fill Positions[1]

	Special Education	Math	Science
Superintendents (N = 80)	40	50	41
Principals (N = 250)	118	82	62

Some district administrators we spoke with stressed that they are experiencing trouble filling positions in areas different from the three most often mentioned in our survey and interviews. For example, superintendent and principal respondents to our survey also identified other positions as hard to fill such as music, speech language pathology, and district or school psychologists.

Hard-to-fill positions vary greatly among districts; the most commonly identified hard-to-fill positions are special education, math, and science.

[1] Reported as number of survey responses.

Provisional Authorizations and Alternative Certificates

One way to measure or define positions that districts and schools find hard to fill is to analyze the number of teachers with provisional authorizations to teach and the number of teachers holding alternative certificates. A provisional authorization is not a teaching certificate, but rather a nonrenewable, one-year emergency authorization.[2] Conversely, alternative routes to certification provide individuals the opportunity to become certified teachers without following a traditional teacher education program.

According to State Board of Education rule, alternative routes to certification aim to certify two types of individuals: (1) certified teachers who need an emergency endorsement and (2) individuals with strong content area backgrounds but limited teaching experience. Different alternative routes to become a certified teacher are available to school districts and individual applicants:

- **Teacher to new**: The teacher-to-new certificate is a nonrenewable, alternative authorization valid for up to three years.[3] It allows a district to fill a position with an individual who is certified to teach but does not have the correct endorsement for the needed content area. Individuals granted this type of alternative authorization have several options available to them to become fully endorsed in the content area.

- **Content specialist**: A content specialist is a nonrenewable, alternative authorization valid for up to three years. It allows a district with an identified need for teachers in a certain content area to hire an individual with a strong background in the needed area. The individual must hold a bachelor's degree, demonstrate content area expertise, and complete an 8–16 week study in education methods.[4]

- **ABCTE**: The American Board for Certification of Teacher Excellence (ABCTE) is a computer-based alternative route to become a teacher or add endorsements. Individuals must hold a bachelor's degree to begin the ABCTE process. Candidates must pass educational methods and content exams before receiving a three-year interim teaching certificate. While holding the interim certificate, candidates must complete a two-year teacher-mentoring program to qualify for a standard teaching certificate.

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2 IDAHO CODE § 33-1203 outlines accredited teacher training requirements and prevents the State Board of Education from issuing standard teaching certificates to teachers who have completed less than four years of accredited college training. However, this section of code allows for the issuance of provisional certificates in emergency cases.

3 The Authorizations Committee of the Professional Standards Commission must approve the teacher-to-new certificate. Once approved, candidates must annually submit an application that outlines their progress to the Authorizations Committee to remain on this route.

4 The Department of Education, in conjunction with an approved Idaho university, develops and approves a plan to meet the requirements of the content specialist authorization.

During the 2011–2012 academic year, 2.4 percent of certified instructional staff (392 teachers) filled positions using a provisional authorization or alternative certificate.[5] Exhibit 3.1 shows how many teachers across the state have held provisional authorizations or alternative certificates the past four academic years.

The exhibit shows that teacher-to-new certificates were the most common type of alternative certificate in academic years 2009–2010 through 2011–2012. Department officials told us that this type of alternative certificate is the least concerning because certified teachers often use this route to add endorsements in high-need areas or areas of interest. Further, teacher-to-new certificates offer districts flexibility to make the right hire because districts not only consider applicants who hold the right endorsements but also consider other qualities such as whether those applicants have the necessary professional dispositions.

Department officials told us that the number of provisional authorizations and alternative certificates granted under the content specialist or the ABCTE are the primary reflectors of high-need positions. The provisional authorization is the least desirable followed by the content specialist and the ABCTE. The provisional authorization is the least desirable because it is a temporary, emergency authorization that cannot lead to certification and does not meet federal requirements for highly qualified teachers.[6] During the 2011–2012 academic year, 222 positions were filled by teachers using a provisional authorization, content specialist, or ABCTE.

EXHIBIT 3.1 NUMBER OF TEACHERS WITH PROVISIONAL AUTHORIZATIONS OR ALTERNATIVE CERTIFICATES

Academic Year	Total	Provisional Authorization[a]	Teacher-to-New Certificate[b]	Content Specialist[c]	ABCTE[d]
2011–2012	392	91	170	22	109
2010–2011	415	66	211	19	119
2009–2010	479	113	249	1	116
2008–2009	659	272	241	4	142

Source: Idaho State Department of Education data.

[a] Provisional authorization is a nonrenewable, one-year authorization that allows a district to hire an individual who is not appropriately certified.
[b] Teacher-to-new certificate is a nonrenewable authorization, valid up to three years, that allows a district to fill a position with an individual who is certified to teach in the needed content area but does not have the correct endorsement.
[c] Content specialist is a nonrenewable authorization, valid up to three years, that allows a district with an identified need in a certain content area to hire an individual with a strong background.
[d] The American Board for Certification of Teacher Excellence (ABCTE) is a computer-based alternative route to become a teacher or add endorsements.

[5] During the 2010–2011 academic year, 2.4 percent of certified staff (415 teachers) had an alternative authorization. In 2009–2010 academic year, 2.7 percent of certified staff (479 teachers) had an alternative authorization, down from 3.7 percent of certified staff (659 teachers) in 2008–2009.
[6] School districts can only hire an individual using a provisional authorization if the district has proved that all attempts to hire a certified individual have failed.

What Types of Recruitment Challenges Do Districts Face?

In our survey of superintendents and principals, most respondents indicated that either their applicant pool was too small for most open teaching positions or that the size of the pool significantly varies depending on the type of position. More superintendents than principals indicated that the applicant pool was too small.

Degree to Which Districts and Schools Have a Sufficiently Sized Applicant Pool for Open Teaching Positions

	Applicant Pool Is Too Small (%)	Desirable Number of Applicants (%)	Excessive Number of Applicants (%)	Size of the Applicant Pool Varies by Type of Position (%)
Superintendents (N = 84)	44.1	16.7	1.2	38.1
Principals (N = 255)	28.6	26.7	7.5	37.3

In addition to asking about the size of the applicant pool, we asked superintendents and principals to weigh in on the quality of the pool. Of particular interest is that less than 5 percent of superintendent respondents felt their district has a high quality applicant pool for open teaching positions.

Degree to Which Districts and Schools Have a Quality Pool of Applicants for Open Teaching Positions

	High Quality Pool (%)	Quality of Pool Generally Meets Expectations (%)	Low Quality Pool (%)	Quality of the Pool Varies Significantly by Type of Position (%)
Superintendents (N = 84)	4.8	32.1	14.3	48.8
Principals (N = 255)	18.4	33.3	16.5	31.8

In general, superintendent and principal respondents agreed on the degree to which they have trouble finding qualified applicants for open teaching positions in a few subject areas or specialties. As the following table shows, 75 percent of superintendent respondents indicated they experience some trouble finding qualified applicants for a few subject areas or specialties as did 65 percent of principal respondents.

Degree to Which Districts and Schools Have Trouble Finding Qualified Applications for Open Teaching Positions

	A Lot of Trouble (%)	Some Trouble in a Few Subject Areas or Specialties (%)	No Trouble (%)
Superintendents (N = 84)	17.9	75.0	7.1
Principals (N = 254)	13.4	65.0	21.7

Most Significant Recruitment Challenges

Besides the size and quality of the applicant pool, we asked superintendents and principals to tell us the most significant challenges they face in recruiting teachers. Both superintendent and principal respondents to our survey indicated the same top five challenges: salary, location of district or school near more competitive states, location of district or school near more competitive districts, remote or rural location, and the benefits package. Four of the five challenges directly relate to teacher compensation packages. A couple of teachers elaborate:

> "…I struggle to support my family on [the] wages of a teacher. Higher paying jobs with less stress outside of teaching look more attractive..."
>
> "I work in one of the best school districts. I am thankful for the strong relationship between administration and teachers. I am seeking employment in Oregon or Wyoming primarily due to low/frozen wages and my inability to support my family…"

Most Significant Teacher Recruitment Challenges[7]

	Remote or Rural Location (%)	Salary (%)	Benefits Package (%)	Located Near More Competitive Districts (%)	Located Near More Competitive States (%)
Superintendents (N = 84)	50.0	76.2	23.8	34.5	40.5
Principals (N = 255)	29.4	66.7	21.2	29.8	34.5

In Idaho, 42 districts border another state and many more are located close to another state's borders. When asked in our survey about the degree to which teacher compensation packages are competitive with neighboring districts, including districts in other states, only 25 percent of superintendent and principal respondents thought Idaho's compensation packages are competitive.

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7 Percentages do not sum to 100 because respondents could select up to three reasons.

Degree to Which Teacher Compensation Packages Are Competitive

	Competitive (%)	Somewhat Competitive (%)	Not Competitive (%)
Superintendents (N = 84)	25.0	33.3	41.7
Principals (N = 254)	24.4	42.1	33.5

Districts' and schools' most significant recruitment challenges relate to teacher compensation packages.

According to data from the National Education Association and the National Center for Education Statistics for the 2010–2011 academic year, among Idaho and its neighboring states, the average teacher salary in Idaho ranks fifth out of seven. The Bureau of Labor Statistics' data from May 2011 echoes this statistic. The bureau reported that the average salaries for Idaho's elementary and middle school teachers ranked fifth out of seven and sixth out of seven for secondary school teachers among Idaho and its neighboring states.

In our district interviews, administrators discussed their challenges to recruit based on teacher salaries in Idaho. These administrators described situations in which an interview is requested or a job offer is extended to an out-of-state candidate, but the candidate turns down the interview request or rejects the job offer because of a salary and benefits package that the candidate perceives as poor. Additionally, three administrators questioned whether Idaho's starting teacher salary provides a livable wage. They mentioned that, between paying student loan debt and household bills, teachers are looking elsewhere—whether that is a second job, a position in another state or another district, or a different profession entirely. One teacher describes this situation:

> "When I graduated four years ago, I did not have a true picture of what teaching would be. I am paid below the poverty level, work a second job, spend 60+ hours a week working on school related things, and am not appreciated for what I do."

Three district administrators also explained the challenges inherent in working for a remote or rural district or school. Two of those administrators specifically described the unique situation of new teachers that are unmarried, explaining that these teachers do not stay.

Respondents to our teacher survey also offered their opinions on the challenges faced by remote or rural districts:

> "We are a rural district with the majority of the teachers commuting approximately 60 miles per day. The district had to make salary cuts to meet its budget. It is hard to entice teachers to commute when teachers can make the same amount at a closer district."

> "Rural school districts do not have the capability to raise bonds for lost state funds. This makes it hard to stay in Idaho for significantly less wages when other states offer…funds at much higher levels."

> "…It is hard to get good, qualified teachers to apply to our rural school with the low support and low pay offered in our state…"

Considerations for Policymakers

The overall statewide percentage of teaching positions currently filled by provisional authorizations or alternative certificates (approximately 2.4 percent) may or may not be acceptable to policymakers. Regardless, more important than focusing on the total number of staff filling certified positions using a provisional authorization or alternative certificate are the local challenges faced by districts.

As described in this chapter, although district and school personnel identified some positions as harder to fill than others, our outreach to these personnel points to local factors that determine which positions are hardest to fill. Hard-to-fill positions not only vary significantly among districts, but can also vary significantly from year to year. Additionally, our survey and interview results revealed that compensation packages and the geographic location of districts often increase the level of difficulty to fill open teaching positions with teachers who possess the desired qualifications, regardless of whether the position is classified as hard to fill.

Chapter 4
Retention and Turnover

This chapter discusses input we received from superintendents, principals, and teachers across the state about the degree to which teacher retention and turnover are issues of concern in districts and schools. The chapter then goes into detail about retirement.

How Much of a Concern Is Teacher Retention?

Our survey asked superintendents and principals to comment on teacher retention issues. Superintendent and principal respondents differed in their opinions about the degree to which teacher retention is a concern. The most common response of both superintendents and principals was that teacher retention is somewhat concerning. In our analysis of the additional comments provided by superintendent, principal, and teacher respondents, problems with teacher retention emerged as the second most common theme identified by all respondents.[1]

Degree to Which Teacher Retention Is a Concern

	Not a Concern (%)	Somewhat of a Concern (%)	Major Concern (%)
Superintendents (N = 84)	19.0	51.2	29.8
Principals (N = 254)	40.2	44.9	15.0

When asked about which level of experienced teacher is the most difficult to retain, 34.5 percent of superintendents and 30.4 percent of principals said that new teachers (0–2 years of experience) are the most difficult to retain. Another 32.1 percent of superintendent respondents and 40.7 percent of principal respondents said that they perceive no difference in the retention of teachers with different levels of experience.

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[1] Low pay was the most common theme.

Most Difficult Teachers to Retain in Terms of Level of Experience[2]

	New Teachers (%)	Teachers Frozen on Salary Schedule (%)	Midcareer Teachers (%)	Highly Experienced Teachers (%)	No Difference in Experience Levels (%)
Superintendents (N = 84)	34.5	32.1	21.4	16.7	32.1
Principals (N = 253)	30.4	25.3	13.4	13.0	40.7

Officials from the Department of Education and the State Board of Education communicated to us that they firmly believe the number one key to teacher retention is formal mentoring and induction programs—programs that can help transition teachers from a teacher education program into a teaching position where they will stay. The colleges of education reiterated this point in our interviews with them and said that although mentoring is needed to get teachers to stay, a gap exists between what teacher education programs provide and what the districts provide. One college indicated a need for collaboration between the teacher education programs and the districts, and another college mentioned the lack of funding to make a mentoring program a priority.

A few district administrators also spoke to the mentoring issue in our interviews with them. One superintendent said that his district specially hired a retired principal who supports new teachers in a mentoring program. Another superintendent told us that his district provides a small stipend for mentor teachers, at least in part because the superintendent feels that many new teachers burnout in the first two years and that those new teachers need mentoring. He stressed that good principals and mentors are key to teacher retention.

In our teacher survey, 81 percent of respondents said they are participating or have participated in a peer mentoring program as either the mentor or the mentee. Of those in a mentoring program, 59.7 percent said the experience is or was important to their professional development and another 32.3 percent said it is or was somewhat important.[3]

How Many Teachers Are Leaving?

The current policy environment for K–12 education in Idaho has created a heightened interest in teacher turnover—specifically how many teachers are

2 Percentages do not sum to 100 because respondents could select more than one response.
3 Only 8 percent said that their peer mentoring experience is or was unimportant to their professional development.

leaving the state's public schools and why. To explore recent trends in teacher turnover and clarify them for policymakers and stakeholders, we analyzed data from the Department of Education and asked about turnover on our survey of superintendents, principals, and teachers.

District-Reported Turnover Data

The Department of Education tracks factors affecting turnover by asking districts to collect exit reasons from staff who are leaving their current positions. The districts then report these reasons to the department.

Recently, various news outlets have published data provided by the Department of Education on teacher turnover. The reports have stated that the number of teachers leaving the profession has increased, rising each year from the 2009–2010 academic year to the 2011–2012 academic year. However, these figures only count those exit reasons that appear to indicate an intention to leave the profession, which is a major caveat.[4]

Aside from this caveat, after dissecting the raw data used to compile these figures, we identified an important issue: for the 2010–2011 and the 2011–2012 academic years, the reported figures include not just teachers, but other types of certified and noncertified staff.

Policymakers should interpret published turnover data with caution.

Because the caveat and issue we identified with the recently reported figures make them likely to be misinterpreted, we conducted our own, updated analysis of the department's turnover data using only certified staff. Our analysis calculated the total number of certified staff who left their current position for each of the exit reasons reported to the department.[5]

Total Number of Certified Staff Who Have Left Their Current Position for Any Reason[6]

Academic Year	Number of Certified Staff	Percentage of Certified Staff
2009–2010	937	5.4
2011–2012	1,112	6.0

[4] The reported figures excluded turnover due to retirement, the transfer of a spouse, those leaving to teach in another education institution, and leave of absence.

[5] For our turnover analysis, we defined certified staff as (1) any staff who hold a valid certificate, and (2) any staff (whether certified or not) who are filling a certified position.

[6] We excluded turnover data for the 2010–2011 academic year because of a data reporting error. This error is described in footnote 7.

As opposed to the dramatic increases shown in the recently published turnover figures, our analysis of the department's data shows only a moderate increase in the number of certified staff who left their current position between the 2009–2010 and the 2011–2012 (937 staff to 1,112 staff) academic years.

Exhibit 4.1 shows the percentage of certified staff who have left their current position over the past three academic years. Our analysis of the Department of Education's data shows that the top three exit reasons were retirement, personal reasons, and to work for another education institution inside Idaho, with one exception in the 2010–2011 academic year. We believe this one exception is likely because of a reporting error.[7] As a result, we conclude that future corrections to the turnover data will likely dramatically decrease the turnover percentage currently attributed to leave of absence, making the top three exit reasons for all three academic years the same.[8]

As the data currently stands, approximately 80 percent of all certified staff who left their position in the 2009–2010 academic year left because of retirement, personal reasons, and work at another education institution inside Idaho. In the 2011–2012 academic year, these three reasons account for about 61 percent of the certified staff that left their current position.

District Outreach: Interview and Survey Results

Although the turnover data available from the Department of Education can help paint a picture of statewide turnover, it does not provide much insight into the effect of turnover. To better gauge how teacher turnover is likely to affect districts, we asked superintendents, principals, and teachers several questions on our survey about the number of teachers who have left or may have plans to leave. Of the 2,487 teachers who responded to our survey, 85.5 percent plan to continue teaching in Idaho and 14.5 percent do not.

- We asked two questions of the 14.5 percent who do not plan to continue teaching in Idaho: 53.0 percent say they are likely to leave their current position to teach in another state, and 43.6 percent said they are likely to leave teaching for a new occupation.

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7 In the 2010–2011 academic year, the most cited exit reason was a leave of absence, which alone accounted for about 52 percent of all certified staff leaving their current position. However, of the certified staff that reported leave of absence as their exit reason, 92 percent were from a single district, indicating a likely error in the data reported. We excluded the turnover rate for the 2010–2011 academic year because the apparent error is so large that it could result in a major misrepresentation of the turnover rate for the entire state.

8 Any data less than three years old is susceptible to change. According to Department of Education officials, districts are allowed up to three years to correct data they submit to the department. Department officials told us that data corrections are common.

EXHIBIT 4.1 CERTIFIED STAFF TURNOVER BY EXIT REASON, ACADEMIC YEARS 2009–2010 THROUGH 2011–2012

	Academic Year		
Exit Reason	2009–2010 (%)	2010–2011 (%)	2011–2012 (%)
Contractor no longer paid on district payroll	0.1	0.8	4.5
Death	0.7	0.6	1.1
Involuntary termination	4.1	1.0	2.1
Leave of absence	2.6	52.4[a]	8.3
Leaving education profession	2.2	3.4	4.9
Military	0.3	0.1	0.2
Parental/family obligation	0.0	0.4	1.1
Personal reasons	8.9	12.7	21.9
Reduction in force	3.2	2.7	6.3
Retirement[b]	51.8	14.1	26.1
Returning to school	0.2	0.5	1.3
Service in foreign country	0.0	0.0	0.2
Spouse transferred	1.6	1.8	2.8
To work for another educational institution inside Idaho	18.9	5.6	12.8
To work for another educational institution outside Idaho	5.4	3.9	6.7

Source: Office of Performance Evaluations' analysis of Department of Education data.

Note: Percentages do not sum to 100 because of rounding.

[a] Of the certified staff that reported leave of absence as their exit reason, 92 percent were from a single district, indicating a likely error in the data reported.
[b] Includes regular retirements and participants in the Early Retirement Incentive Program.

- We also asked two questions of the 85.5 percent who plan to continue teaching in Idaho: 74.4 percent say they are unlikely to leave their current position to teach in another school within the same district, and 73.1 percent say they are unlikely to leave their current position to teach in another district.

> Most teachers plan to continue teaching in Idaho.

The survey responses of superintendents and principals showed differing opinions on the degree to which teacher turnover is a concern for their district or school. In general, principals felt turnover was less of a concern than superintendents did.[9] In our survey of teachers, 167 respondents commented that they or other teachers they work with

[9] These results mirror the responses provided by superintendents and principals to our survey question about teacher retention.

are considering leaving. For example, one teacher articulated his or her perception of why teachers may leave:[10]

> "I can understand why no teacher would want to teach here or stay because every year for the past five years we have taken a pay cut, had more responsibilities, and been given less support and appreciation."

Degree to Which Teacher Turnover Is a Concern

	Not a Concern (%)	Somewhat of a Concern (%)	Major Concern (%)
Superintendent (N = 84)	19.0	48.8	32.1
Principals (N = 255)	40.4	42.0	17.6

We followed up our question about the degree to which teacher turnover is a concern with a question for superintendents and principals about the most common teacher exit reasons in their district or school. The top three reasons for turnover according to the superintendent respondents matched the top three reasons for turnover identified by the principal respondents. Retirement was the most common reason selected, followed by out-of-state transfers and transfers to another district within Idaho.

Most Common Teacher Exit Reasons[11]

	Retirement (%)	Transfer Out of State (%)	Transfer to Another District (%)
Superintendents (N = 68)	60.3	57.4	51.5
Principals (N = 152)	54.0	44.7	38.8

The survey results mirror what we learned in our ten district interviews. In these interviews, two district administrators mentioned retirement as the reason for the majority of turnover. Six administrators discussed the challenges inherent in trying to keep teachers from leaving for other states (particularly Wyoming where salaries are higher). Another five administrators described the competition for staff among districts. One respondent to our teacher survey explains:

10 This comment did not necessarily specify whether the respondent meant he or she was considering leaving his or her current position or the profession altogether.
11 Percentages do not sum to 100 because respondents could select up to three reasons.

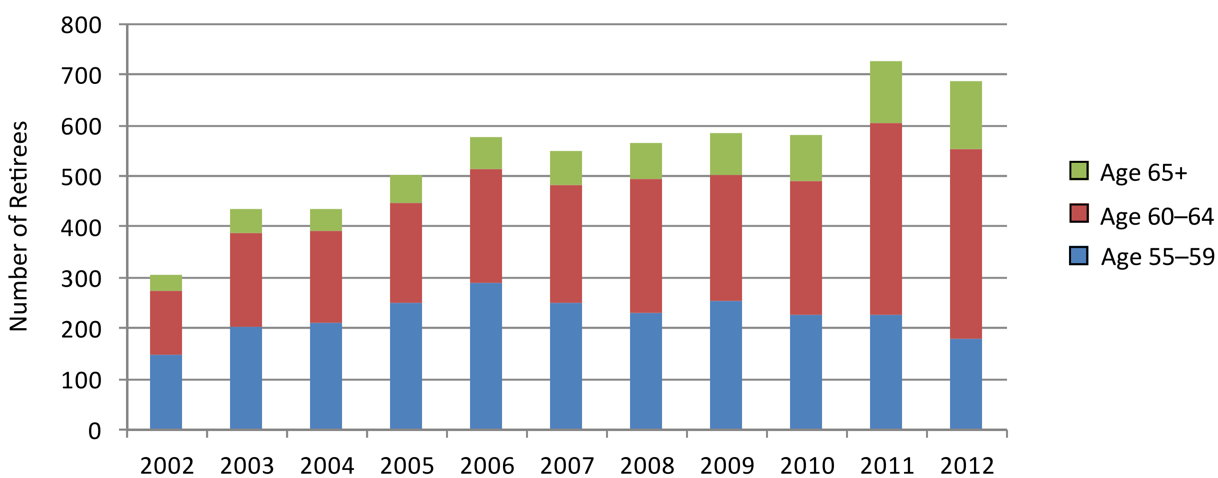
> "We are losing many of our best teachers because they are overworked and underpaid so they take opportunities elsewhere."

What Benefits Does PERSI Offer Teachers?

K–12 teachers in Idaho are general members of the Public Employee Retirement System of Idaho (PERSI).[12] PERSI applies the same rules to teachers that it applies to any other general member.[13] The rules outline eligibility requirements and a formula that calculates retirement benefits. The date a member becomes eligible to retire depends on the member's age and years of service.[14] The benefit available at retirement is calculated by a formula that takes into account salary, years of service, and a benefit multiplier.[15]

An average of approximately 3 percent of teachers have retired each year from fiscal year 2002 to 2012—a total of approximately 6,000 teachers. Exhibit 4.2 shows the total number of teachers that have retired each year since fiscal year 2002.

EXHIBIT 4.2 NUMBER OF TEACHER RETIREES, FISCAL YEARS 2002–2012



Source: Data from PERSI.

[12] PERSI is a defined benefit plan into which both employees and employers pay contributions.
[13] General members of PERSI have different rules than members who qualify as public safety officers.
[14] Members accrue one month of service for each calendar month worked as an active member. Active members are those who work 15 or more days within one calendar month and, if you are a teacher, work half time or more. A member's retirement benefit is based on 42 consecutive months during which a member earns his or her highest average salary.
[15] The benefit multiplier for general members is 2 percent.

Idaho Code § 59-1342 defines the service retirement age as 65 for general members, including teachers. General members who retire at the age of 65 will receive their full retirement benefit. For a reduced retirement benefit, general members can retire at the minimum age of 55. Exhibit 4.2 depicts how many teachers retired at the service age versus how many retired before the age of 65.

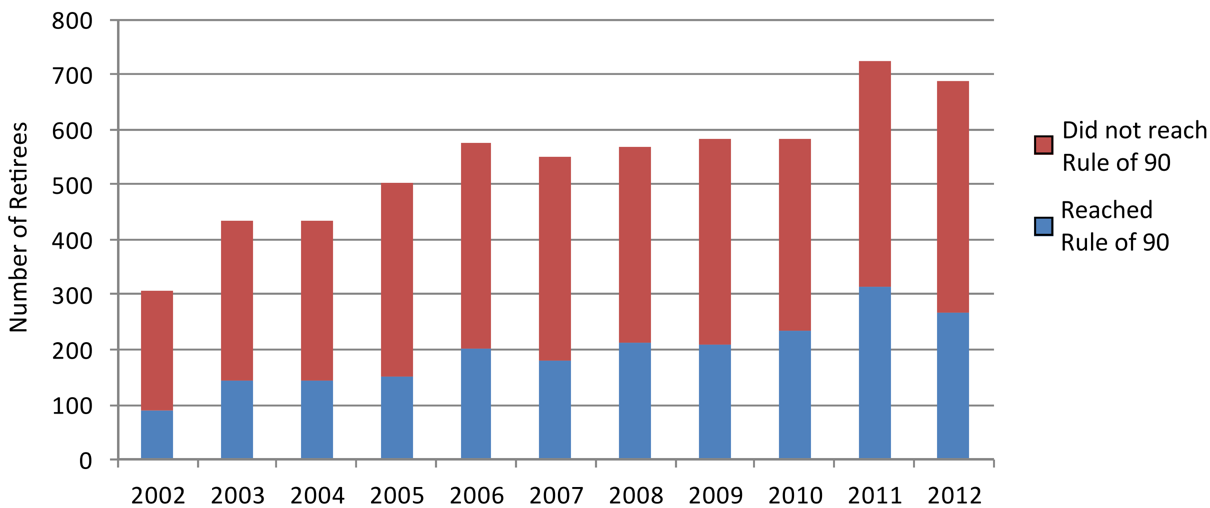
Early Retirement

The average retirement age for teachers in Idaho is 61, an average that falls between the service retirement age and the minimum retirement age. PERSI allows teachers and other general members to retire early and still receive their full retirement benefit if they have met their rule of 90.

Rule of 90: Member age plus years of service equals 90.

If general members retire before 65 or before reaching their rule of 90, their retirement benefit is reduced. Exhibit 4.3 depicts how many teachers had reached their rule of 90 when they retired. It shows that many teachers over the past decade had not yet reached their rule of 90 before retiring. The early retirement incentive made available to certified district staff (excluding administrators) may, at least in part, explain this trend.[16]

EXHIBIT 4.3 NUMBER OF TEACHER RETIREES WHO DID AND DID NOT REACH THEIR RULE OF 90 AT RETIREMENT, FISCAL YEARS 2002–2012



Source: Data from PERSI.

[16] Certified staff can take the one-time incentive (based on a percentage of the employee's salary and his or her age) if they meet certain criteria. Two of the criteria state that the employee (1) must not have met the rule of 90, and (2) must have been between the ages of 55 and 62.

Retirement and the Recession

Over the past decade, teacher retirement trends look about the same with no significant deviations from the norm. PERSI does not have any data to support the premise that teachers who are eligible for retirement are continuing to work because of the effect of the salary cuts on their PERSI base plan benefit or the effect of the recession on their elective 401K benefit.

According to PERSI's executive director, the effect of salary cuts on a teacher's base plan benefit depends heavily on when the cut took place and how much was cut. A teacher continuing to work may actually have very little effect on their base plan benefit because PERSI uses the highest average salary in a consecutive 42-month period.

The executive director also said, however, that the teachers PERSI tends to hear from are those who do not see the value in continuing to work. For example, a common scenario that PERSI officials have recently seen is a teacher who has experienced a salary cut and does not expect his or her salary to return to its highest point for another couple of years at best. In this case, the teacher often decides to retire.

A majority of the respondents (88.5 percent) to our teacher survey said they are not eligible to retire, but 9.2 percent indicated that they are.[17] When those 9.2 percent were asked why they have not yet retired, they most often cited two reasons; 52.8 percent of them said they enjoy teaching and are not ready to retire, and another 54.8 percent said they cannot afford to retire.[18] The next most common reason respondents mentioned for why they had not retired was that they intend to retire by the end of the current academic year (3.8 percent).

Leaving PERSI

Teachers can transfer within the state from one school to another or from one district to another without the transfer affecting their status in the retirement system. However, if a teacher transfers out of state, two things happen: (1) PERSI's retirement benefit would not transfer, making the teacher an inactive member, and (2) the teacher would presumably enter a different retirement system in his or her new state.

According to PERSI's executive director, the benefits that a teacher would be eligible for by accumulating years of service in two or more systems do not

[17] About 2 percent of respondents were not sure if they are eligible to retire.
[18] The 54.8 percent of respondents who said they cannot afford to retire is the combined response of 52.8 percent of respondents who indicated that they cannot afford to retire and 2.1 percent of respondents who selected the category "other" and specified that they cannot afford insurance.

equate to the benefits that the same teacher would be eligible for had the teacher accumulated all of his or her years of service in one system.

For example, if a teacher taught in an Idaho school district for 15 years and then transferred out of state where he or she taught for another 15 years, the teacher would have accumulated 30 years of service. Upon retirement, the teacher would draw benefits from two state retirement systems unless he or she claimed a separation benefit when leaving PERSI-covered employment.[19] Whether the teacher is "penalized" for the transfer (i.e., not accumulating all 30 years of service in Idaho) would depend on his or her individual set of circumstances. The net effect (positive or negative) of any transfer in and out of different retirement systems would have to be determined on a case-by-case basis. Hence, any transfer among retirement systems would most certainly result in either a benefit increase or decrease because every retirement system has its own set of rules and offers different benefits.[20]

The effect of out-of-state transfers on teacher retirement benefits can only be quantified case by case.

Considerations for Policymakers

Notably, the data currently available on teacher turnover does not support assertions that turnover has experienced a marked increase or change over the past three years. Therefore, we conclude that a mass teacher exodus has not occurred but that fears about such an exodus occurring in the future may not be totally unfounded. In light of our discussion in two areas: (1) the recruitment and retention challenges detailed in this chapter and the previous one, and (2) the widespread tone of dissatisfaction expressed in our survey results, we suggest that policymakers consider turnover data as one more source of information available to identify and track recruitment, retention, and job satisfaction issues faced by districts and schools.

By understanding what is and is not included in turnover numbers (for example, only teachers versus certified staff versus all staff), policymakers can use the data provided in this chapter as a baseline to monitor trends going forward, especially as conversations begin anew about the direction and pace of education reform in Idaho. Keeping a watchful eye on teacher turnover trends will only serve to better inform policy decisions and improve policymakers' ability to ascertain future teacher workforce needs—needs described in chapter 5.

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[19] A separation benefit is a withdrawal of the contributions made to your base plan account.
[20] The average monthly benefit collected by PERSI retirees are the eleventh lowest in the nation. Conceivably, a teacher could move to 39 other states and receive a benefit enhancement. Among neighboring states, only retirees in Wyoming and Montana have a lower average monthly benefit than retirees in Idaho.

Chapter 5

Future Teacher Workforce Needs

The discussions in chapters 3 and 4 on recruitment, retention, and turnover lend to a discussion of what the future supply and demand for teachers will be. This chapter highlights one other important factor affecting future teacher workforce needs: changing teacher duties. After discussing superintendent, principal, and teacher opinions about changes in teacher duties, this chapter concludes with an explanation of what resources are available to understand teacher supply and demand.

How Are Teacher Duties Changing?

By discussing factors that affect recruitment, retention, and turnover chapters 3 and 4 both outline concepts that will likely affect Idaho's future need for teachers. One other important area that we identified as having the potential to affect the supply and demand of teachers is the changing nature of teacher duties. Policymakers expressed specific interest in understanding whether teacher duties may have changed due to a loss of support staff.

Our survey asked superintendents and principals to indicate the degree to which teachers in their district or school have experienced a change in duties due to a loss of support staff. We also asked teachers for their opinions on how much their duties have changed. Superintendent, principal, and teacher respondents had nearly identical responses, with approximately 47–48 percent of each set of respondents indicating the loss of support has caused a significant change in teacher duties.

Degree to Which Teachers Have Experienced a Change in Duties Due to a Loss of Support Staff

	Significant Change (%)	Some Change (%)	No Change (%)
Superintendents (N = 84)	47.6	40.5	11.9
Principals (N = 255)	47.8	43.9	8.2
Teachers (N = 2,467)	47.1	38.6	14.4

Likewise, in our district interviews, several administrators mentioned that the loss of paraprofessionals and other instructional or duty aides has had a burdensome effect on teachers' time and attention. For example, a few administrators explained that instead of teachers spending time preparing for class, developing curriculum, or mentoring a student one-on-one, they are performing lunch, recess, or bus duty.

Teachers, as well as district and school administrators, commented on the daily demands of teachers that extend beyond instructional duties.

District administrators we interviewed said that the reduced numbers of support staff coupled with increased demands are causing a shift in the nature of teacher duties. For instance, district administrators mentioned new initiatives, such as the Common Core or Students Come First, as examples of increased demands on teachers, as well as the concept of meeting the diverse needs of all students—to include not only academic needs but also social, emotional, and health needs. A few respondents to our teacher survey expanded on the expectation to do more with fewer resources:

> "The continual pressure on public school teachers to do more and more with less and less is grinding me to dust. It's not one big thing, it's all the small-to-medium things, for the past three years, that is causing me to reconsider my career as a teacher.
>
> "I have taught for 28 years. The last few years have been the most difficult of my career. I truly believe in accountability, but realistic accountability. We are expected to do more and more with less and less and no support. I will leave teaching soon."

According to administrators we interviewed, teacher workload is increasing as teachers are asked to do more, change more, and change faster. One administrator explains the potential effect:

> "Teaching is to some degree like an actor's performance. What I mean is that it's a craft. Teachers have to present information in a way that engages their students and it takes a high amount of energy to do that. There's a need for them to have breaks and regroup… What is happening is that teachers are having to do more of the duties (recess, lunch, detention, etc.) and that limits their ability to get ready for their lessons…
>
> …It affects the education of kids. If people really followed a master teacher for a good while of time, they would see the energy level required day in, day out to be present. I can read lines as an actor, but can I perform? That's true with teaching; there's a science and an art. You need to provide certain supports for the art."

Because of the potential for teacher duties to change for any number of reasons, we also asked teacher respondents to our survey to identify up to three other factors that may have caused a change in their duties besides a loss of support staff. Interestingly, given the opportunity to list other factors, respondents reiterated a loss of staff as the most common factor affecting a change in duties followed by budgetary or funding factors and larger class sizes.

Teachers most commonly identified a loss of support staff as causing a change in their duties.

What Are Idaho's Future Needs?

Legislators expressed interest in developing a deeper understanding of Idaho's anticipated needs—an important matter in light of the perceptions of superintendents, principals, and teachers on a variety of K–12 issues outlined not only in this chapter, but also throughout the report. We learned that to make future need projections, we would have to rely substantially on assumptions and caveats to separate any long-term changes in teacher recruitment and retention patterns from the effects of recent economic conditions and the current K–12 policy environment. Furthermore, projections for the future statewide supply and demand for teachers in Idaho can be complex because the balance of supply and demand for teachers varies dramatically by district. Each district has its own challenges for recruiting and retaining teachers and should be examined individually.

As part of our effort to respond to legislators' questions and quantify Idaho's future need for teachers, we asked superintendent and principal respondents to our survey about their expectations for the number of open teaching positions. Specifically, we asked respondents to project whether open positions will be above, below, or about average over the next two years. Nearly half of both superintendent and principal respondents indicated they thought the number of open teaching positions would be average. The remaining respondents felt that the number of open teaching positions would be either below or above average. These respondents also provided a rationale:

Data currently available on teacher supply and demand does not lend itself to a straightforward conclusion that is applicable to the entire state.

- Approximately 15 percent of superintendent respondents said that they expected the number of open teaching positions will be lower than average over the next two years versus 25 percent of principal respondents. Superintendents cited three reasons in approximately equal proportions: decreased student enrollment, reduced workforce, and anticipated low turnover. On the other hand, most principals indicated that they expected fewer open positions because they anticipated low turnover rates.

- About one-third of superintendent respondents and one-fourth of principal respondents said that they expect the number of open teaching positions will be higher than average over the next two years. When asked to offer their opinion on why they thought there would be more open teaching positions than usual, both superintendent and principal respondents indicated they expected increased teacher retirement and voluntary turnover, including teachers leaving for other states, teachers leaving because they are dissatisfied or feel underappreciated, and teachers leaving because of low salaries.

Only about half of teacher respondents feel that their job is secure.

When we asked teacher respondents to comment on their level of job security, nearly half (48.9 percent) indicated they feel their job is secure. However, 22.8 percent said they did not feel their job was secure, and another 28.4 percent were unsure.

Current Efforts to Quantify Needed Positions

The Department of Labor calculates employment projections for a wide range of occupations, including teachers. Exhibit 5.1 displays the Department of Labor's employment projections for elementary, middle, and secondary school teachers through 2020. The estimates project an annualized growth of 1.3 percent each year.

Exhibit 5.1 Employment Projections for Teachers, 2010–2020

Type of Teacher	2010 Employment	2020 Employment	Net Change	Percentage Change (%)	Annual Growth[a]	Annualized Growth[b] (%)	Annual Replacements[c]	Annual Openings[d]
Elementary[e]	6,960	8,160	1,200	17	120	1.60	153	273
Middle School[e]	1,848	2,167	319	17	32	1.61	41	73
Secondary[e]	4,416	4,741	325	7	33	0.71	121	154
Total	13,224	15,068	1,844	14	185	1.31	314	499
All Education Occupations[f]	38,973	44,368	5,395	14	540	1.30	835	1,375

Source: Data from the Idaho Department of Labor's 2010–2020 Occupation Projections.

[a] Number of vacancies due to growth in the student population.
[b] Average percentage of growth per year from 2010 to 2020.
[c] Number of vacancies due to natural turnover such as retirement.
[d] Openings due to growth and replacement needs.
[e] Excludes special education and vocational teachers.
[f] Includes all P–20 positions plus library and training positions.

The Department of Education compiled a detailed supply and demand report in the past but has significantly scaled back that report because it was, according to department officials, neither accurate nor useful. In order to complete the report, the department had to rely on district personnel to do cumbersome guesswork. Now the report only reflects districts' hard-to-fill positions—information that the department provides annually to the federal government.

Despite the lack of a robust teacher supply and demand report, the State Board of Education, in conjunction with the Department of Education and the Department of Labor, is taking several steps toward reaching a better understanding of teacher supply and demand issues—primarily by linking education data with workforce data. To help make this link, the State Board of Education secured federal grant money. Under the grant, the board is working with the Department of Education and the Department of Labor to meet three primary objectives:

1. The State Board of Education is working with the Department of Labor to develop the workforce database (maintained by the Department of Labor). The funds for this part of the project total $2.5 million.

2. The Department of Education is responsible for enhancing the education unique ID system (EDUID) to enable the system to link students to the workforce database. The funds for this part of the project total $250,000.

3. The State Board of Education will create a research request portal with funds totaling $259,000.

Additionally, the Department of Labor received a Workforce Data Quality Initiative grant for $1 million that will be used to determine the effectiveness of workforce development programs. The ultimate goal is for the state to have a robust longitudinal data system that links P–20 education data to workforce data.[1]

Considerations for Policymakers

> Future teacher workforce needs are inconsistent among districts.

Teacher workforce needs can be difficult to predict, especially given the undetermined effect of recent economic conditions and the current K–12 policy environment. Although this chapter identifies some statewide themes that affect future need, not all districts or even schools within the same district face similar workforce needs. Our survey results show that future need is not consistent statewide. Some districts and schools expect significant numbers of open teaching positions; others expect relatively few open teaching positions.

[1] P–20 refers to a system that integrates data from preschool through higher education.

When looking to ensure an adequate supply of high quality teachers in Idaho, policymakers should consider who is being priced into or out of the teaching workforce. Our study leads to a pointed question—to whom are policymakers appealing to enter the teaching profession?

If the state places enough demands on teachers' time and attention and if teachers perceive that they are given little credit for the work they do, then the state may experience negative effects. Examples of such negative effects could include erosion of the size and quality of the teacher workforce wherein teachers or potential teachers begin to favor professions that pay better, are more positively viewed, or both. Under these conditions, the state would run the risk of declines not only in the number of people who are willing to enter or remain in the profession, but also in the quality of the pool of prospective candidates.

Appendix A
Project Scope
June 2012

The Senate Education Committee has expressed interest in learning more about Idaho's public school teachers—a population of more than 15,000 who educate K–12 students in 115 districts and 43 charter schools across the state. The committee is particularly interested in studying what factors come together to bring quality teachers into classrooms and what factors keep them there.

During the 2012 session, on behalf of the Senate Education Committee, Chairman Goedde requested a study of teacher recruitment, retention, and attrition and a few other issues of interest to committee members. Senator Hammond then added a question about class size to the committee's request. On March 12, 2012, the Joint Legislative Oversight Committee approved the request, inclusive of Senator Hammond's addition.

Our evaluation will address each question and topic area presented in the request:

1. Educator recruitment – How do teachers find their way into this profession and why?

2. Teacher attrition – Why do teachers leave the profession, where do they go, and in what numbers?

3. Teacher retention – What keeps Idaho teachers in the classroom?

4. In the face of an aging teaching workforce and a growing population, what are Idaho's anticipated needs for future educators?

5. Are teachers graduating with the skills to be successful in today's classrooms and, if not, what are those deficiencies?

6. National statistics may support the theory that educators moving from one state to another lose about half their pension potential over their work careers. How does PERSI, Idaho's retirement system, treat educators moving from one pension system to another?

7. Identify the challenges and opportunities to attract new teachers and to retain current staff.

8. Provide a decade of historical data on the supply of educators versus job openings.
9. Because the ratio of students to certified staff does not necessarily reflect the number of students in a classroom, segregate certified teachers associated with a classroom and examine class size variations in Idaho.
10. Examine changes in duties of teachers and whether there are new burdens on time and attention created by a loss of community resource workers, counselors, and other support staff.

Projected completion date: January 2013

Appendix B

Survey of K–12 Public School Personnel

Purpose and Methods

In September 2012 we surveyed district and school personnel (specifically superintendents, principals, and teachers) to gather their perspectives on concerns that are of interest to policymakers (see study scope in appendix A).

We conducted ten interviews with district administrators across the state that helped inform the development of our survey. We pilot tested the superintendent and principal survey with a group of five superintendents, and we pilot tested the teacher survey with two current teachers, one former teacher, and a school counselor.

We e-mailed the survey to all superintendents and principals using a contact list provided by the Department of Education. Our e-mail asked principals to share the survey with their teachers. As a result, we received 2,826 survey responses: 84 superintendents, 256 principals, and 2,486 teachers. The survey results indicate that respondents are a diverse representation of a majority (about 72 percent) of Idaho districts and charters.

We automatically disqualified any district or school personnel who did not identify themselves as a superintendent, principal, or teacher from taking the survey. We purposely limited potential survey respondents to superintendents, principals, and teachers for two reasons:

1. These positions (and their basic descriptions and functions) are universal across districts. Other types of district administrators and certified school staff are inconsistent across districts and schools.

2. We did not have a complete contact list for any personnel except for superintendents and principals. No complete contact list for teachers exists. The Idaho Education Association maintains a list of their members' e-mail addresses, but this list does not include the addresses of teachers who are not members. However, because legislators expressed specific interest in learning more about teachers in the classroom, we decided to survey them by asking principals to forward the survey link to their teachers.

Limitations

We had some limitations to our survey:

- We chose to limit the final open-ended question to 50 words because the number of potential respondents to our survey was greater than 17,000 and office resources were not available to analyze lengthy responses for that large of a number.

- Given the varied nature of spam filters in districts and schools, we assume that some number of superintendents and principals did not receive our e-mail and link to the survey. We cannot quantify that number.

- Because a statewide list of teacher e-mails does not exist, we had to rely on principals to forward the survey link to their teaching staff.

- Our survey design criteria, particularly the criterion that outlined who was qualified to take the survey, could be classified as limited by those who expressed interest in taking the survey but did not qualify to do so.

Superintendent Responses

Please indicate the degree to which teacher turnover is a concern in your district. (N=84)

	Responses	Percentage of Respondents
Major concern	27	32
Somewhat of a concern	41	49
Not a concern	16	19

Please indicate which of the following teacher exit reasons are the most common in your district. Select up to three. (N=68)

	Responses	Percentage of Respondents
Retirement	41	60
Transfer to another district	35	51
Transfer to another school within my district	1	1
Transfer out of state	39	57
Personal reasons	7	10
Change of career	17	25
Reduction in force	12	18
Involuntary termination	4	6
Other, please specify	7	10

Note: Percentages do not sum to 100 because respondents could provide more than one response.

Over the next two years, do you expect the number of open teaching positions in your district to be (N=84)

	Responses	Percentage of Respondents
Higher than average	32	38
Average	39	46
Lower than average	13	15

Note: Percentages do not sum to 100 because of rounding.

I expect the number of open teaching positions to be higher than average because of Select all that apply. (N=32)

	Responses	Percentage of Respondents
Student growth	8	25
Teacher retirement	23	72
Voluntary turnover	13	41
Class size reduction efforts	3	9
Other, please specify	15	47

Note: Percentages do not sum to 100 because respondents could provide more than one response.

I expect the number of open teaching positions to be lower than average because of
Select all that apply. (N=13)

	Responses	Percentage of Respondents
Decreased student enrollment	4	31
Reduction in force	5	38
Anticipated low turnover	4	31
Other, please specify	5	38

Note: Percentages do not sum to 100 because respondents could provide more than one response.

During the hiring process, please indicate the degree to which your district has a sufficient pool of applicants for open teaching positions. (N=84)

	Responses	Percentage of Respondents
Our applicant pool is too small for most positions	37	44
We have a desirable number of applicants for most positions	14	17
We have an excessive number of applicants for most positions	1	1
The size of our applicant pool significantly varies depending on the type of position	32	38

During the hiring process, please indicate the degree to which your district has a quality pool of applicants for open teaching positions. (N=84)

	Responses	Percentage of Respondents
High quality pool	4	5
The quality of our pool is not particularly high or low, but generally meets our expectations	27	32
Low quality pool	12	14
The quality of our pool significantly varies depending on the type of position	41	49

Please indicate the degree to which your district generally has trouble finding qualified applicants to fill open teaching positions. (N=84)

	Responses	Percentage of Respondents
A lot of trouble	15	18
Some trouble in a few subject areas or specialties	63	75
No trouble	6	7

What are your district's most significant challenges in recruiting teachers? Select up to three. (N=84)

	Responses	Percentage of Respondents
Remote/rural location	42	50
Salary	64	76
Benefits package	20	24
Non-renewable contracts	3	4
Located near more competitive districts	29	35
Located near more competitive states	34	40
My district has no significant recruitment challenges	6	7
Other, please specify	6	7

Note: Percentages do not sum to 100 because respondents could provide more than one response.

Please identify your district's hard-to-fill positions. Insert up to three. (N=80)

	Responses	Percentage of Respondents
Math	50	63
Music	10	13
Science	41	51
Special education	40	50
My district does not generally have hard-to-fill positions	5	6
Other	37	46

Note: Percentages do not sum to 100 because respondents could provide more than one response.

Please indicate the degree to which teacher retention is a concern in your district. (N=84)

	Responses	Percentage of Respondents
Major concern	25	30
Somewhat of a concern	43	51
Not a concern	16	19

Which level of experienced teachers does your district have the most difficulty retaining? Select all that apply. (N=84)

	Responses	Percentage of Respondents
New teachers (0-2 years of experience)	29	35
Teachers frozen on the salary schedule	27	32
Midcareer teachers	18	21
Highly experienced teachers	14	17
No difference in the retention of teachers with different experience levels	27	32

Note: Percentages do not sum to 100 because respondents could provide more than one response.

Please indicate the degree to which your district's teacher compensation package is competitive with neighboring districts, including districts in other states. (N=84)

	Responses	Percentage of Respondents
Competitive	21	25
Somewhat competitive	28	33
Not competitive	35	42

Please indicate the degree to which new teachers (0-2 years of experience) in your district are prepared to teach. (N=84)

	Responses	Percentage of Respondents
Most are prepared	48	57
Some are prepared, others are not	35	42
Most are unprepared	1	1

What is your overall level of satisfaction with new teachers (0-2 years of experience)? (N=84)

	Responses	Percentage of Respondents
Satisfied	59	70
Neither satisfied nor unsatisfied	21	25
Unsatisfied	4	5

Please indicate the degree to which class size (number of students per classroom teacher) is a concern in your district. (N=84)

	Responses	Percentage of Respondents
Major concern	20	24
Somewhat of a concern	34	40
Not a concern	30	36

What are the skills or credentials you would most like to see increased in new teacher hires? Select all that apply. (N=84)

	Responses	Percentage of Respondents
Multiple certifications and/or endorsements	64	76
Familiarity with technology	27	32
Ability to integrate technology into the classroom	45	54
Classroom management	50	60
Subject area expertise	35	42
I'm generally satisfied with the skills and credentials of new teachers	6	7
Other, please specify	11	13

Note: Percentages do not sum to 100 because respondents could provide more than one response.

Please indicate the degree to which teachers in your district have experienced a change in duties due to a loss of support staff (such as paraprofessionals, duty aides, Community Resource Workers, counselors, etc.). (N=84)

	Responses	Percentage of Respondents
Significant change	40	48
Some change	34	40
No change	10	12

Principal Responses

What is the level of your school? (N=256)

	Responses	Percentage of Respondents
High school	62	24
Middle or junior high	44	17
Elementary	118	46
Other, please specify the grade range	31	12

Note: Percentages do not sum to 100 because of rounding.

Please indicate the degree to which teacher turnover is a concern in your school. (N=255)

	Responses	Percentage of Respondents
Major concern	45	18
Somewhat of a concern	107	42
Not a concern	103	40

Please indicate which of the following teacher exit reasons are the most common in your school. Select up to three. (N=152)

	Responses	Percentage of Respondents
Retirement	82	54
Transfer to another district	59	39
Transfer to another school within my district	20	13
Transfer out of state	68	45
Personal reasons	37	24
Change of career	39	26
Reduction in force	33	22
Involuntary termination	7	5
Other, please specify	15	10

Note: Percentages do not sum to 100 because respondents could provide more than one response.

Over the next two years, do you expect the number of open teaching positions in your school to be (N=255)

	Responses	Percentage of Respondents
Higher than average	65	25
Average	123	48
Lower than average	67	26

Note: Percentages do not sum to 100 because of rounding.

I expect the number of open teaching positions to be higher than average because of
Select all that apply. (N=65)

	Responses	Percentage of Respondents
Student growth	10	15
Teacher retirement	30	46
Voluntary turnover	20	31
Class size reduction efforts	6	9
Other, please specify	33	51

Note: Percentages do not sum to 100 because respondents could provide more than one response.

I expect the number of open teaching positions to be lower than average because of
Select all that apply. (N=67)

	Responses	Percentage of Respondents
Decreased student enrollment	11	16
Reduction in force	17	25
Anticipated low turnover	41	61
Other, please specify	13	19

Note: Percentages do not sum to 100 because respondents could provide more than one response.

During the hiring process, please indicate the degree to which your school has a sufficient pool of applicants for open teaching positions. (N=255)

	Responses	Percentage of Respondents
Our applicant pool is too small for most positions	73	29
We have a desirable number of applicants for most positions	68	27
We have an excessive number of applicants for most positions	19	7
The size of our applicant pool significantly varies depending on the type of position	95	37

During the hiring process, please indicate the degree to which your school has a quality pool of applicants for open teaching positions. (N=255)

	Responses	Percentage of Respondents
High quality pool	47	18
The quality of our pool is not particularly high or low, but generally	85	33
Low quality pool	42	16
The quality of our pool significantly varies depending on the type of position	81	32

Note: Percentages do not sum to 100 because of rounding.

Please indicate the degree to which your school generally has trouble finding qualified applicants to fill open teaching positions. (N=254)

	Responses	Percentage of Respondents
A lot of trouble	34	13
Some trouble in a few subject areas or specialties	165	65
No trouble	55	22

What are your school's most significant challenges in recruiting teachers? Select up to three. (N=255)

	Responses	Percentage of Respondents
Remote/rural location	75	29
Salary	170	67
Benefits package	54	21
Non-renewable contracts	36	14
Located near more competitive districts	76	30
Located near more competitive states	88	35
My school has no significant recruitment challenges	34	13
Other, please specify	31	12

Note: Percentages do not sum to 100 because respondents could provide more than one response.

Please identify your school's hard-to-fill positions. Insert up to three. (N=249)

	Responses	Percentage of Respondents
Math	82	33
Science	62	25
Special Education	118	47
My district does not generally have hard-to-fill positions	41	16
Other, please specify	130	52

Note: Percentages do not sum to 100 because respondents could provide more than one response.

Please indicate the degree to which teacher retention is a concern in your school. (N=254)

	Responses	Percentage of Respondents
Major concern	38	15
Somewhat of a concern	114	45
Not a concern	102	40

Which level of experienced teachers does your school have the most difficulty retaining? Select all that apply. (N=253)

	Responses	Percentage of Respondents
New teachers (0–2 years of experience)	77	30
Teachers frozen on the salary schedule	64	25
Midcareer teachers	34	13
Highly experienced teachers	33	13
No difference in the retention of teachers with different experience levels	103	41

Note: Percentages do not sum to 100 because respondents could provide more than one response.

Please indicate the degree to which your school's teacher compensation package is competitive with neighboring districts, including districts in other states. (N=254)

	Responses	Percentage of Respondents
Competitive	62	24
Somewhat competitive	107	42
Not competitive	85	33

Note: Percentages do not sum to 100 because of rounding.

Please indicate the degree to which new teachers (0–2 years of experience) in your school are prepared to teach. (N=253)

	Responses	Percentage of Respondents
Most are prepared	143	57
Some are prepared, others are not	101	40
Most are unprepared	9	4

Note: Percentages do not sum to 100 because of rounding.

What are the skills or credentials you would most like to see increased in new teacher hires? Select all that apply. (N=255)

	Responses	Percentage of Respondents
Multiple certifications and/or endorsements	91	36
Familiarity with technology	68	27
Ability to integrate technology into the classroom	115	45
Classroom management	172	67
Subject area expertise	73	29
I'm generally satisfied with the skills and credentials of new teachers	32	13
Other, please specify	50	20

Note: Percentages do not sum to 100 because respondents could provide more than one response.

What is your overall level of satisfaction with new teachers (0–2 years of experience)? (N=254)

	Responses	Percentage of Respondents
Satisfied	178	70
Neither satisfied nor unsatisfied	68	27
Unsatisfied	8	3

Please indicate the degree to which class size (number of students per classroom teacher) is a concern in your school. (N=254)

	Responses	Percentage of Respondents
Major concern	106	42
Somewhat of a concern	97	38
Not a concern	51	20

What is the average class size (number of students per classroom teacher) in your district? (N=247)

	Responses	Percentage of Respondents
Less than 10	1	0.4
10–11	2	0.8
12–13	3	1
14–15	8	3
16–17	7	3
18–19	4	2
20–21	19	8
22–23	29	12
24–25	57	23
26–27	42	17
28–29	28	11
30–31	19	8
32–33	13	5
34–35	10	4
36 or more	5	2

Note: Percentages do not sum to 100 because of rounding.

Please indicate the degree to which teachers in your school have experienced a change in duties due to a loss of support staff (such as paraprofessionals, duty aides, Community Resource Workers, counselors, etc.). (N=255)

	Responses	Percentage of Respondents
Significant change	122	48
Some change	112	44
No change	21	8

Teacher Responses

How many years have you been teaching in Idaho? (N=2,480)

	Responses	Percentage of Respondents
0–2	263	11
3–5	336	14
6–10	552	22
11–20	725	29
21–30	476	19
More than 30	128	5

What is your highest level of education? (N=2,484)

	Responses	Percentage of Respondents
Associate's degree	8	0.3
Bachelor's degree	628	25
Some graduate credits	805	32
Master's completed	350	14
Credit beyond masters	592	24
PhD (EdD) completed	19	0.8
Other, please specify	82	3

Note: Percentages do not sum to 100 because of rounding.

Which type of certification do you hold for your current position? (N=2,476)

	Responses	Percentage of Respondents
Regular	2,309	93
Provisional	35	1
Alternative, teacher to new	7	0.3
Alternative, content specialist	52	2
Alternative, ABCTE	56	2
Alternative, postbaccalaureate	7	0.3
No certification	10	0.4

Note: Percentages do not sum to 100 because of rounding.

What is your age? (N=2,479)

	Responses	Percentage of Respondents
29 or younger	289	12
30–39	556	22
40–49	690	28
50–54	375	15
55–59	341	14
60–64	191	8
65 or older	37	1

What is the level of your school? (N=2,487)

	Responses	Percentage of Respondents
High school	753	30
Middle/junior high	445	18
Elementary	1,065	43
Other, please specify the grade range	224	9

Which subject(s) do you teach? Select all that apply. (N=1,416)

	Responses	Percentage of Respondents
English (includes reading, writing, or language arts)	406	29
Math (algebra, statistics, geometry, calculus, etc.)	325	23
Science (biology, chemistry, physics, etc.)	290	20
Social studies (government, history, etc.)	283	20
Foreign language	57	4
Art	84	6
Physical education	95	7
Computers or other technology courses	115	8
Band, orchestra, music, choir	71	5
Professional/technical education	139	10
Special education	171	12
Other, please specify	230	16

Note: Percentages do not sum to 100 because respondents could provide more than one response.

In your current position, what is your average class size? (N=2,313)

	Responses	Percentage of Respondents
Less than 10	130	6
10–11	78	3
12–13	82	4
14–15	86	4
16–17	60	3
18–19	85	4
20–21	224	10
22–23	190	8
24–25	485	21
26–27	258	11
28–29	206	9
30–31	252	11
32–33	83	4
34–35	33	1
36 or more	61	3

Note: Percentages do not sum to 100 because of rounding.

How long have you taught in your current positions? (N=2,480)

	Responses	Percentage of Respondents
0–2 years	575	23
3–5 years	552	22
6–10 years	585	24
11–20 years	506	20
21–30 years	210	8
More than 30 years	52	2

Note: Percentages do not sum to 100 because of rounding.

Where did you hold your previous teaching position? (N=2,466)

	Responses	Percentage of Respondents
Same school, different position	412	17
Different school within the same district	570	23
Another school district within Idaho	525	21
Out of state	390	16
This is my first teaching position	569	23

Do you feel your job is secure? (N=2,483)

	Responses	Percentage of Respondents
No	566	23
Not sure	704	28
Yes	1,213	49

Do you plan to continue teaching in Idaho? (N=2,487)

	Responses	Percentage of Respondents
No	360	14
Yes	2,127	86

Are you likely to leave your current position to teach in another state? (N=362)

	Responses	Percentage of Respondents
Likely	192	53
Not sure	93	26
Unlikely	77	21

Are you likely to leave teaching for a different occupation? (N=362)

	Responses	Percentage of Respondents
Likely	158	44
Not sure	83	23
Unlikely	121	33

Are you likely to leave your current position to teach in another Idaho school within the same district? (N=2,129)

	Responses	Percentage of Respondents
Likely	118	6
Not sure	428	20
Unlikely	1583	74

Are you likely to leave your current position to teach in another Idaho district? (N=2,131)

	Responses	Percentage of Respondents
Likely	148	7
Not sure	425	20
Unlikely	1,558	73

Are you participating or have you participated in any kind of peer mentoring program while teaching in Idaho? Select all that apply. (N=2,487)

	Responses	Percentage of Respondents
Yes, I am mentoring someone or have mentored someone	1,212	49
Yes, I am being mentored or was mentored by someone	802	32
No	691	28

Note: Percentages do not sum to 100 because respondents could provide more than one response.

Please indicate the degree to which your participation in a peer mentoring program is/was important to your professional development. (N=1,783)

	Responses	Percentage of Respondents
Important	1,064	60
Somewhat important	576	32
Not important	143	8

Are you eligible to retire? (N=2,487)

	Responses	Percentage of Respondents
Yes	230	9
No	2,200	88
Not sure	57	2

Note: Percentages do not sum to 100 because of rounding.

Why have you not retired? Select all that apply. (N=288)

	Responses	Percentage of Respondents
I enjoy teaching and am not ready to retire	152	53
I am waiting until my current position can be filled	4	1
I cannot afford to	152	53
Other, please specify	59	20

Note: Percentages do not sum to 100 because respondents could provide more than one response.

Please indicate the degree to which you have experienced a change in duties due to a loss of support staff (such as paraprofessionals, duty aides, Community Resource Workers, counselors, etc.). (N=2,467)

	Responses	Percentage of Respondents
Significant change	1,161	47
Some change	952	39
No change	354	14

SUBJECT

Accountability Oversight Committee Statewide Accountability System Recommendations

REFERENCE

October 2015	Accountability Oversight Committee presented recommendations to the Board regarding changes to be made to the state's accountability system, in preparation for submission of a new ESEA waiver
February 2016	Board received an update on the timeline for the Accountability Oversight Committee to bring recommendations forward
April 2016	Accountability Oversight Committee presented recommendations to the Board regarding removal of the ISAT proficiency and college entrance exam graduation requirements. The Board adopted the recommendation that the ISAT proficiency graduation requirement be removed and rejected the recommendation that the college entrance exam graduation requirement be removed.

APPLICABLE STATUTE, RULE, OR POLICY

Idaho State Board of Education Governing Policies & Procedures, Section III.AA. Accountability Oversight Committee

Section 33-110, Idaho Code – Agency to Negotiate, and Accept, Federal Assistance

Idaho Administrative Code, IDAPA 08.02.02 – Section 111, Assessment in the Public Schools; IDAPA 08.02.02 – Section 112, Accountability; IDAPA 08.02.02 – Section 113, Rewards; and IDAPA 08.02.02 – Section 114, Failure to Meet Adequate yearly Progress (AYP); IDAPA 08.02.03 – Section 105.

BACKGROUND/DISCUSSION

The Accountability Oversight Committee (committee) was established in April 2010 as an ad-hoc committee of the Idaho State Board of Education to make recommendations to the Board on improvements to the statewide student achievement system and to report annually to the Board ono the effectiveness of the system. On December 10, 2015, President Obama signed the Every Student Succeeds Act (ESSA) reauthorizing the Elementary and Secondary Education Act of 1965. Pursuant to ESSA, states must implement new accountability systems aligned to the law by the 2017-2018 school year.

In January 2016, the Policy, Planning and Governmental Affairs Committee charged the Accountability Oversight Committee with bringing forward recommendations to the Board that were in alignment with the Task Force recommendations for a new state accountability system (Recommendation 5 – 2013) and would meet the federal accountability requirements. This charge included gathering input from all education stakeholders with the goal of having a recommendation ready in time for the Board to consider the recommendation and test those parts of the recommendation that are during the 2016-2017 school year prior to holding districts accountable to them in the 2017-2018 year, as required by ESSA.

The committee sought out expert guidance and stakeholder feedback throughout the process of developing their recommendations. The committee's report is provided as Attachment 1; a summary of recommendations by topic follows:

Performance Measures
- An accountability system that includes indicators which meet the requirements for federal accountability and additional state indicators to be provided on a data dashboard that present a well-rounded picture of school performance
- Separate indicators for three (3) types of schools: Elementary and Middle Schools, High Schools, and Alternative High Schools (please see the full report for the committee's recommendations of indicators appropriate for each school category)

High School Assessment and Graduation Rate Calculations
- Transition the accountability assessment (ISAT by Smarter Balanced) for high school to 11th grade administration
- Adjust the graduation rate calculation by extending the period for students to complete graduation requirements through the summer

Student Growth Calculations
- The State Department of Education should work closely with members of the Idaho Assessment Technical Advisory Committee to identify and recommend a new model for calculating student growth

Scoring and Reporting
- Data regarding schools' performance on all accountability indicators should be presented publically on an interactive online data dashboard; however, the dashboard should not include a summative score or performance rating

The draft accountability system recommended by the committee, particularly the indicators designated for use for federal accountability, is compliant with ESSA requirements. However, the committee's recommendation to not publically post a summative rating or score for all schools conflicts with the proposed regulations released in May by the U.S. Department of Education. The committee would like to provide feedback regarding the regulations, as the committee members feel that the proposed data dashboard is in compliance with the ESSA and its intent and hopes that the U.S. Department of Education will adjust the regulations before they are finalized.

IMPACT

Adoption of the recommendations will provide Board staff with the details needed to finalize administrative rules regarding the state's comprehensive assessment system and accountability requirements.

ATTACHMENTS

STAFF COMMENTS AND RECOMMENDATIONS

At the April 2016 regular Board meeting the Board was asked to consider the removal of the Idaho Standards Achievement Test (ISAT) proficiency and college entrance exam (ACT or SAT) graduation requirements. These recommendations were brought forward in advance of the accountability system recommendations so that any action taken by the Board could be implemented through the administrative rule promulgation process this year, as the requirements are contained in Idaho Administrative Code, IDAPA 08.02.03.105. At that time the Board adopted the recommendation to remove the ISAT proficiency graduation requirement and rejected the recommendation to remove the requirement that a student take a college entrance exam, returning the recommendation to Accountability Oversight Committee.

The current state graduation requirements require, in addition to a minimum number of credits in specific content areas, that each student show proficiency through achievement of a "proficient" or "advanced" score on the grade 10 Idaho Standards Achievement Test (ISAT) in math, reading and language usage (or an alternate route established by the school district), and that all students take a college entrance exam in grade 11. Additional provisions exist for students who miss the state administration of the college entrance exam in grade 11. The Board will be considering an amendment to IDAPA 08.02.03.106.06, Proficiency, removing the proficiency requirement as a separate agenda item during the August 2016 Board meeting.

The state Comprehensive Assessment System and state accountability requirements are contained in IDAPA 08.02.03.111-113. Amendments to these sections in alignment with the proposed Committee recommendations will be presented to the Board as a separate agenda item. Based on Board consideration of the Committee's recommendations, changes may need to be made to the proposed rule prior to Board consideration at the August Board meeting. The state rulemaking timelines require that Notices of Intent be published prior to the development of any new or proposed rules in a timely manner that allows for public input prior to the Board considering any proposed amendments or new administrative rules. For proposed rules to make it through the rulemaking process in a given year the Board must take action on the proposed changes at the August Board meeting. The Board cannot take action on something that has not been properly noticed (unless it meets one of the limited exemptions for notice of intent).

The existing assessment program requires the ISAT be administered to students in grades 9 and 10, and as applicable to students in grade 11. The Committee recommendations would move the required administration of the ISAT to grade 11. This would result in the required participation rate being calculated from those students in grade 11 taking the ISAT.

The current college entrance exam requirement was added as part of the High School Redesign Initiative of the Board in 2003. This initiative increased the rigor of the state's high school graduation requirements by increasing the number of credits required in math and science, requiring senior projects be completed, requiring that math be taken during the senior year, and requiring that students take a college entrance exam to graduate. While not fully realized, the initiative also contemplated moving toward a standards-based approach rather than the prior seat time credit requirement. This included using end of course assessments and standards-based portfolios and examinations for determining proficiency in the standards to graduate and expanding the ISAT science assessment to every grade level. The current college entrance exam requirement allows students to choose between the ACT or SAT. Based on the state procurement and bidding processes, the state was able to procure favorable terms for the statewide administration of the SAT. This allows the state to pay for all students to take the SAT on the statewide "test day" at no cost to the student. Students may choose to take the assessment at that time at no cost to them or they may take it on a different day, or they may choose to take the ACT at their own expense. The ACT and the SAT provide fee waivers to certain eligible students and some school districts pay the cost of the student to take the ACT if they choose. The current graduation requirement allows the student to choose which assessment they take.

The requirement to take a college entrance exam was based in part on research from other states that showed just taking the exam had helped to increase the number of students going on to postsecondary education. Additional data showed that college entrance exams were a barrier to students going on to college when the students came from homes where they were the first individual in the family to go on to a postsecondary education or came from families that did not value postsecondary education. These students often did not have the support or the information needed to understand the importance of taking a college entrance exam and were less likely to voluntarily take the exam. Requiring all students take a college entrance exam reached this group of students as well as students that chose not to take the exam because they did not think they would be successful.

By requiring the exam be taken in grade 11, students who initially did not do well on the exam could use the exam to identify areas that needed improvement and then retake the exam during their senior year. Those students that did well on the exam in grade 11 were able to use the exam in completing initial college entrance and scholarship applications. The High School Redesign Initiative was adopted by the Board in 2004. Following additional public and legislative input, initiative components were refined with final Administrative Code amendments adopted by the Board in 2005 and approved by the Legislature in 2006. This initiative was also accompanied by significant budget requests starting in FY 2007. Due to the college entrance exam being a graduation requirement, the Board and the State Department of Education were successful in winning legislative support for state funding to cover the cost for all students to take the college entrance exam (based on a statewide contract). The first graduating class subject to the college entrance exam requirement was the class of 2012. The impact of this requirement on Idaho's Go On rate is unknown due to the limited number of student cohorts that have graduated since the requirement went into effect. Additional benefits that were not contemplated as part of the original initiative have been the ability to use the college entrance exam to identify students for the Direct Admissions initiative and the recommendation from the Governor's Taskforce subcommittee on Accountability and Autonomy that the college entrance exam being used as one of the standard performance measure used by all school districts (as applicable) in their continuous improvement plans. If students were not required to take a college entrance exam, one of the two (2) prongs currently used for admissions under the Board's Direct Admission program would be lost, and fewer students might see postsecondary education as a viable option.

The framework provided as Appendix B to the Accountability Oversight Committee's Recommendations was developed by Idaho higher education faculty, high school counselors, school administrators and State Department of Education staff in the spring and summer of 2014 and is an example of how the ISAT could be used for identifying remediation needs and placement at the postsecondary level. The framework has not been adopted by the Board and based on changes to available assessments, and the discontinuance of the Compass by ACT, would need to updated prior to consideration of it use. At this time it should only be used as an example of what could be done in this area.

BOARD ACTION

I move to adopt the Accountability Oversight Committee's recommendations regarding the statewide accountability framework model as presented in Attachment 1.

Moved by __________ Seconded by __________ Carried Yes _____ No _____

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Accountability Oversight Committee
K-12 Statewide Accountability System Recommendations

Members and Past Members Involved in Developing these Recommendations:

Linda Clark	Current Member (Ex-officio)	Member, State Board of Education
Debbie Critchfield	Current Member (Ex-officio)	Member, State Board of Education
Pete Koehler	Current Member (Ex-officio)	Deputy Superintendent, State Department of Education
Julian Duffey	Current Member (5/19/16 - 6/30/18)	Special Education Director, Bonneville Joint District
John Goedde	Current Member (7/1/15 - 6/30/17)	Former Idaho State Senator and School Board Trustee, Coeur d'Alene District
Roger Stewart	Current Member (5/19/16 - 6/30/18)	Professor, College of Education, Boise State University
Jackie Thomason	Current Member (7/1/15 - 6/30/17)	Chief Academic Officer, West Ada District
Spencer Barzee	Past Member (7/1/14 - 6/30/16)	Superintendent, Westside District
Deborah Hedeen	Past Member (7/1/15 - 4/19/16)	Dean, College of Education, Idaho State University
Alison Henken	Staff Support	K-12 Accountability & Projects Manager, Office of the State Board of Education

Subcommittee Charge:

To provide recommendations regarding the re-development of the statewide K-12 school accountability system.

Guiding Principles:

We support an accountability system that:

1. Includes multiple measures which provide meaningful, trustworthy data and aid schools in building a culture of student achievement and school improvement.
2. Reports results responsibly to accurately depict student achievement.
3. Is flexible in its application to school design and considers schools' unique situations.

Recommendations

The Accountability Oversight Committee has undergone a substantial process to develop its recommendations. Over the course of eleven (11) meetings, from January to June 2016, the group met for over 48 hours.

The committee sought stakeholder feedback and guidance from experts throughout the process of developing the accountability framework. In February, the Accountability Oversight Committee participated in a video conference with an expert from the Education Commission of the States (ECS) regarding national trends in accountability. On March 7th, the following stakeholder groups provided in-person feedback to the committee: Idaho Association of School Administrators, Idaho School Boards Association, Virtual School Leaders, Public Charter School Commission, State Department of Education, and Senate Education Committee Chair, Dean Mortimer. The Idaho Education Association and Northwest Professional Educators were also invited to participate; both chose to send their feedback in writing due to time constraints. The Accountability Oversight Committee invited staff from the State Department of Education and the Division of Professional-Technical Education to provide information and expertise related to accountability for specialized schools and subgroup populations. The committee also facilitated a phone call with members of Idaho's Technical Advisory Committee to gather their feedback on the indicators under consideration.

In May, the Accountability Oversight Committee released the Draft Accountability Framework and an accompanying online survey to gather public feedback. The Office of the State Board of Education issued a press release about the survey and worked with stakeholder groups to encourage participation of educators (K-12 and higher education), parents, legislators, and community members. A total of 776 Idahoans responded to the survey. Analysis of the survey results was extensive and detailed, and was used by the committee as a source of information when the committee was making final decisions regarding which indicators to recommend for inclusion in the accountability framework. The majority of the recommendations are in alignment with the feedback received. The analysis report can be made available at the Board's request.

Utilizing the information and knowledge gained through this process, the Accountability Oversight Committee makes the following recommendations:

1. **We recommend the state use the Idaho Standards Achievement Test (ISAT) by Smarter Balanced for statewide accountability for administrations in grades 3-8 and 11.**

   a. We recommend shifting the administration of the high school accountability assessment (ISAT by Smarter Balanced) from 10th to 11th grade.

      - The Smarter Balanced assessment was designed for high school administration in 11th grade. Shifting Idaho's administration to 11th grade will put us in alignment with the recommendations of the Smarter Balanced Assessment Consortium, will ensure appropriate use of the assessment, and will ensure the most valid results possible. Additionally, it will allow comparability between Idaho's high school assessment results and those of other states administering the Smarter Balanced Assessment.

- Since it is closer to the end of a student's high school career, 11th grade is a more appropriate year for accountability than 10th grade.
- Shifting the ISAT by Smarter Balanced to the 11th grade will allow the Office of the State Board of Education to re-engage in work previously done with the state's higher education institutions to establish a framework that will allow use of ISAT by Smarter Balanced scores for course placement. The draft framework is provided as Appendix B. Establishing use of ISAT by Smarter Balanced scores for college placement will increase the value of the assessment for students.

b. We recommend that the ISAT by Smarter Balanced be administered statewide in high school only for the required accountability year (11^{th} grade) and that additional required administrations be removed from Administrative Code.

- We recommend that appropriate ongoing monitoring and interventions for students who do not demonstrate proficiency in 8th grade be determined and implemented at the local level.
- We recommend that the state consider including an 8th to 11th grade ISAT growth calculation on high school data dashboards in the future. To determine whether this calculation is appropriate and valid, data modeling using ISAT by Smarter Balanced data should first be completed.

2. We recommend the state adopt an accountability model that includes separate indicators for Elementary and Middle Schools (K-8), High Schools, and Alternative High Schools, as outlined in Appendix A.

a. The Elementary and Middle Schools (K-8) category will include all schools who do not have a 12^{th} grade.

b. The High Schools category will include all non-alternative schools who have a 12^{th} grade.

c. The Alternative High Schools category will include all schools who have a 12^{th} grade and have been designated as an alternative school by the Idaho State Department of Education.

3. We recommend the state adopt an accountability framework that includes indicators to be used for federal accountability and additional state measures to be included on schools' data dashboards, as detailed in Appendix A.

4. We recommend the state adopt a new model for calculating student growth.

a. The Student Growth Percentile model used in the state's Star Rating system was complex, making it difficult to effectively explain to families and stakeholders.

b. We recommend the State Department of Education work closely with members of Idaho's Technical Advisory Committee to identify a model that balances validity of results with ease of understanding by educators, parents, and the public.

5. **We recommend that the graduation rate calculation be adjusted by extending the period for students to complete graduation requirements through the summer.**

   a. This would ensure that students who complete graduation requirements during the summer after their senior year and, therefore, graduate in that year are included as a completer in the school's graduation rate.

   b. This is a logical change, as it will result in the period for the current cohort ending when the new cohort begins.

6. **We recommend that school performance data for all accountability indicators be provided to the public on a data dashboard, but that the dashboard not include a single, summative score or performance rating.**

   a. The committee recognizes the following issues with publically assigning summative performance scores (such as 1 to 5 Stars) to schools:

      - School design and demographics have an impact on how likely a given school's students are to perform well in proficiency or growth categories (for instance, schools with many high performers typically see less growth in a given year than those with more struggling students). As a result, it is impossible to establish one process for weighting proficiency and growth measures that is appropriate for all schools. This increases the likelihood that schools will be misidentified. Furthermore, by weighting categories at the state level for the purposes of giving schools a summative score, schools will be inclined to focus on the areas that are emphasized by the state, rather than identifying the areas of focus that best fit their schools' needs and design.

      - Summative performance scores are broad categories, which results in a watering down of the actual results. For instance a 2 Star school might be at the bottom of that category one year and at the top of the category the next year. The tendency of the public is to see the school as a 2 Star school and to not recognize the improvement made.

   b. The committee recognizes that the indicators used for federal accountability will need to be combined in some manner in order to identify schools for comprehensive support and improvement and targeted support and improvement. However, the committee does not recommend that schools' score or rating be included on the data dashboard or school report card, or otherwise publically reported.

7. **We recommend that school report card data be presented online in a manner that is clear, user-friendly, and interactive.**

   a. We recommend that an interactive dashboard be used in order to allow stakeholders to easily view summary data while also being able to dig deeper into the data in order to more fully understand schools' performance. For instance, the summarized proficiency data for all students would be presented on the dashboard, but the user could click on the summary image and be guided to other data that could be viewed, such as the proficiency by grade or subgroup, or comparisons to district or statewide averages.

   b. We recommend that the school report card include a hyperlink to schools' local report cards and/or performance measures.

Appendices

A. **Idaho K-12 Accountability System Framework, June 2016**
B. **ISAT by Smarter Balanced High School to Postsecondary Transition Framework**

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APPENDIX A

Idaho K-12 Accountability System Framework
June 2016

K-8

- **ACADEMIC**
  - ISAT Proficiency
  - ISAT Growth
  - ISAT Gap Close (non-proficient)
  - IRI (revised, eff 2019)
  - English Learner Test Growth
- **SCHOOL QUALITY**
  - Next Level Readiness Index
    - To be determined: measure(s) of 5th graders ready for MS
    - % 8th Graders Enrolled in Pre-Algebra or higher
    - % 8th Graders without any unsatisfactory (F) grades in core subjects
  - Chronic Absenteeism
  - Technology Index (to be determined)
  - Teacher Quality & Engagement Index
    - Teachers' Advanced Credit, Degree, Natl Accrediation, or Industry Certification
    - Teacher Attendance

High School

- **ACADEMIC**
  - ISAT Proficiency
  - ISAT Growth (8th to 11th) - TBD 2020-21 after data modeling
  - English Learner Test Growth
  - 4 yr Cohort Grad Rate
- **SCHOOL QUALITY**
  - College & Career Readiness Index
    - 9th Graders On-Track to Graduate Index
      - % 9th Graders Enrolled in Certain Coursework
      - % 9th Graders without any unsatisfactory (F) grades in core subjects
    - % of students with 3.0 GPA or higher
    - Advanced Opportunities Index
      - # of unduplicated students who complete advanced opportunities (concurrent, AP, IB, CTE eligiblity for TCC)
      - % of unduplicated students who complete advanced opportunities (concurrent, AP, IB, CTE eligiblity for TCC)
      - Total # of advanced opportunity credits earned (concurrent, AP, IB, CTE eligibility for TCC)
    - Career Experience (% students participating in job shadowing, internships, etc.)
    - Go On Rate (% that enroll in and attend postsecondary certificate program, college, university or military service - effective TBD)
    - Postsecondary and Career Readiness Exam Index
      - PSAT
      - SAT
      - ACT
      - Technical Skills Assessment & Workplace Readiness Assessment
  - Chronic Absenteeism
  - Technology Index (to be determined)
  - Teacher Quality & Engagement Index
    - Teachers' Advanced Credit, Degree, Natl Accrediation, or Industry Certification
    - Teacher Attendance

Alternative HS

- **ACADEMIC**
  - ISAT Proficiency
  - ISAT Growth (8th to 11th) - TBD 2020-21 after data modeling
  - English Learner Test Growth
  - 4 yr Cohort Grad Rate
  - Extended Yr Grad Rate
- **SCHOOL QUALITY**
  - Credit Recovery / Accumulation
  - Chronic Absenteeism
  - Technology Index (to be determined)
  - Teacher Quality & Engagement Index
    - Teachers' Advanced Credit, Degree, Natl Accrediation, or Industry Certification
    - Teacher Attendance
  - Student Engagement Index
    - Classroom Teacher to Student Ratio
    - Counselor/ College-Career Advisor to Student Ratio
  - Workplace Readiness Assessment (effective TBD)

KEY

Black	AOC recommends including this measure on the data dashboard and using it to meet federal requirements
Green	AOC recommends including this measure as a state measure and including it on the data dashboard
Blue	AOC recommends using this measure as a state measure when data is available and including it on the data dashboard at that time
Orange	AOC recommends considering including this measure at a later time, pending data modelling when appropriate data is available

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APPENDIX A

Definitions and Additional Information

Term	Current or Proposed Definition	Additional Information
AP	Advanced Placement	
Chronic Absenteeism	Students with less than 90% attendance	
CTE Eligibility for TCC	Career Technical Education students eligible for Technical Competency Credit	Students will be recognized for being eligible for Technical Competency Credit even if they choose not to have it transcripted.
English Learner Test	The WIDA / ACCESS test that is given to students who are learning English	AOC recommends using the same growth model for this indicator as the growth model used for ISAT growth for K-8.
Extended Year Graduation Rate	A calculation that uses the 4 year cohort but allows one additional year for students to graduate	
IB	International Baccalaureate	
IRI	Idaho Reading Indicator	AOC recommends waiting to include this indicator until a new assessment is in place.
ISAT	Idaho Standards Achievement Test	
ISAT Proficiency	Students who have scored proficient or higher on the ISAT, demonstrating appropriate grade-level knowledge	AOC recommends using an index that gives the school partial weight to students who score basic (i.e. 0.5 for each student), full credit for students who score proficient (i.e. 1.0 for each student) and above full credit for students who score advanced (i.e. 1.25), as this encourages schools to support students in continuing to move forward.
ISAT Gap Close (non-proficient)	A measure that examines whether students who are not proficient on the ISAT (as a group) are making appropriate progress to close their achievement gap within an established period of time	
ISAT Growth	A measure that considers how much knowledge students have gained, as demonstrated by their score on the ISAT	
Technology Index	An index that would measure the availability and use of technology in schools	Specific measures to include in this index have not yet been determined; the committee recommends including it, but leaves determination of exact measures to the SDE / other work groups. The AOC recognizes that this indicator may need to be added at a later date (after the 2017-2018 school year).
Workplace Readiness Assessment	An assessment currently used in the state's career-technical programs that measures whether a student is well-prepared to be successful in the workforce	The assessment is not currently used at Alternative High Schools. Based on stakeholder feedback and the committee's review, the AOC recommends the state pay for this assessment to be administered to all alternative high school students and included it in the accountability system as a state measure.

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APPENDIX B

Spring 2014 Recommendations from Idaho Higher Education Faculty and Staff, High School Counselors, School Administrators and Department of Education Staff for using the ISAT by Smarter Balanced 11th Grade Assessment, SAT, ACT, and Compass for Initial Course Placement Decisions by Idaho Institutions of Higher Education[1]

Introduction and Background

Idaho is a member of the *Smarter Balanced Assessment Consortium* (SBAC). SBAC assessments in Idaho will be administered in grades 3-8 and once in high school. It is important to note that the transition frameworks proposed below assume high school students take the assessment in 11th grade. Students in the testing grades will be given summative assessments each spring in English Language Arts (ELA) and mathematics. The final summative SBAC assessment in the spring of 11th grade is considered a measure of college and career readiness. Because of this, SBAC developed a four-tiered framework articulating the degree to which a student is considered college ready at the time of 11th grade testing. Following is a description of the four tiers taken from the SBAC College Content-Readiness Policy. Please note that remedial course work in this context means noncredit-bearing college course work in ELA or mathematics taken prior to enrolling in an entry-level college credit-bearing course:

- Level 4 Exempt—upon entry into college student is exempt from remedial course work. K-12 and higher education officials may jointly set Grade 12 requirements to maintain the exemption.
- Level 3 Conditionally Exempt—student is conditionally exempt from remedial course work, contingent on evidence of sufficient continued learning in Grade 12.
- Level 2 Partial Understanding—student needs support to meet college content-readiness standard.
- Level 1 Minimal Understanding— student needs substantial support to meet college content-readiness standard.

It is important to note that SBAC leaves it up to individual member states to decide what Grade 12 requirements there will be, if any, to maintain Exempt status. SBAC also leaves it up to individual member states to decide what evidence will be required of students during Grade 12 to move from Conditionally Exempt to Exempt status by the end of Grade 12. And finally, individual member states also decide what supports to provide those students at Levels 1 and 2.

In order to begin discussions around these important decisions, a work group led by Idaho's delegation to the SBAC – K-12 Lead, Higher Ed Lead, and Higher Ed Delegate – and consisting of representatives from public higher education institutions, high schools, the Office of the State Board of Education and the State Department of Education convened to draft recommendations regarding the use of the Smarter Balanced 11th grade assessment, the SAT, the ACT, and the Compass in the postsecondary initial course placement process. SAT, ACT, and Compass assessments were included in the discussions because Idaho requires a college entrance examination be taken prior to graduation from high school.

Timetable/Feedback Process

The work group held near-weekly meetings throughout summer 2014. This document represents the consensus of the group and is thus being submitted to the Chief Academic Officer of the

Idaho State Board of Education so that the comment, revision, and approval process can commence. The work group wants to underscore several important points that need to be taken into consideration as the framework is vetted by a diverse group of stakeholders:

- The SBAC levels are best guesses at this point. The SBAC is a new assessment and has not had predictive validity studies conducted on it at this time. Thus, Idaho needs to undertake such studies to verify that the levels are valid indicators of how ready students are for college;

- The SAT, ACT, and Compass* scores found in the framework are an amalgam of cut scores taken from all eight higher education institutions in Idaho. Currently, the cut scores are under review by the State Board of Education. Once the State Board of Education arrives at new cut score criteria, then those will replace what is currently found in the frameworks. The predictive validity studies mentioned above should also include SAT, ACT, and Compass scores so that Idaho has empirical evidence underpinning the important decisions made based on these scores;

- The GPA's found in the frameworks are based on existing research and the professional opinions of work group members. Predictive validity studies are needed for these cut scores also;

- The committee recommends that the frameworks be approved for a three year trial period during which the above mentioned predictive validity research will be conducted along with the collection of valid and reliable stakeholder feedback about the frameworks and their operationalization. At the conclusion of the three year period, the frameworks should be revisited and revised based on the empirical evidence that has been collected;

- The committee recommends that a work group be immediately formed to develop a framework for how college readiness transition courses will be incorporated into Idaho high school curricula. The committee suggests that a two tiered framework be developed. One tier would reflect what should be done within the existing resources currently found in Idaho high schools. The other tier would reflect what should be done if additional resources are made available. This is an important point because many Idaho high schools will find it difficult to incorporate new courses into their high school schedules without additional resources because of staffing constraints, scheduling constraints, etc.

- The committee recommends that a work group be immediately formed to develop a framework for how students scoring below Level 3 who are not yet prepared for the above mentioned transition courses will be served so that they achieve at least Level 3 upon high school graduation. A two-tiered framework similar to that mentioned immediately above is recommended. One tier reflecting what should be done now within current resources and another articulating what should be done if additional resources become available. But the committee warns against developing a remedial course structure at the high school level that mirrors what has been developed over the past decades at the collegiate level. Such a

* The Compass was discontinued in 2015 by ACT and is no longer available.

structure fails to address the systemic problem of under-preparation of students which usually starts much earlier than high school. A more productive approach would be a long term solution that improves the entire prek-12 pipeline that includes earlier identification and intervention instead of waiting until high school to try to bring students to criterion. Such a responsive and robust prek-12 system is what the *Complete College Idaho Plan* calls for, and such a system will be essential for Idaho to achieve its 60% goal by 2020. It is likely, however, that developing, implementing, tuning, and sustaining this system will require additional resources in both the short and long term.

Following are two tables containing the four-tiered frameworks. One table illustrates the mathematics framework and the other illustrates the ELA framework.

Proposed Mathematics Framework

11th Grade Mathematics Performance		
Performance Level*	**Student Status and Conditions**	**Additional Comments**
Level 4: Exempt **SBAC**: Level 4; or **SAT Math:** 521-610; or **ACT Math**: >23; or **Compass****: ≥ 61 Algebra or 45-48 College Algebra; or **Transcript**: Completion of AP math course with 3 or better score on test **Note:** SAT, ACT and Compass cut scores are currently under review by the SBOE (See Note 1)	Exempt from courses with a noncollege level prerequisite (Note: Math 108 is not considered college level.). **Maintaining Level 4 Exempt**: Complete post-Algebra II or post-Integrated Math 3 course in senior year with a minimum grade of B.	➢ These criteria basically define a student ready for Math 123, Math 130, Math 143, Math 147, or an entry level statistics course. ➢ Students are expected and should be advised to take dual credit general education math courses and other opportunities for earning college credit during 12th grade.
Level 3: Conditionally Exempt **SBAC**: Level 3; or **SAT Math**: 471-520; or **ACT Math**: 19-23; or **Compass**: 41-60 Algebra or 0-44 College Algebra	Exempt from remediation for placement into Math 123: Liberal Arts Math (Note: Other local exceptions might apply.). **Achieving Level 4 Exempt**: Complete post-Algebra II including post-Integrated Math 3 course in senior year with a minimum grade of B or retest at Level 4 or successfully complete an Idaho-approved math college readiness transition course or successfully complete a dual credit general education math course. (See Notes 2 & 3) **Maintaining Level 3 Conditionally Exempt:** Complete post-Algebra II or post-Integrated Math 3 course in senior year with a passing grade.	➢ These criteria basically define a student ready for Math 123 or other similar courses unique to individual campuses.
Level 2: Needs Support **SBAC**: Level 2; or	Not exempt from remediation. **Achieving Level 3 Conditionally Exempt**: Complete math course in	➢ These criteria basically define a student ready for Math 025.

** The Compass was discontinued in 2015 by ACT and is no longer available.

SAT Math: 390-470; or **ACT Math**: 16-18; or **Compass**: 26-40 Algebra or 53-99 Pre-Algebra	senior year (Algebra II or higher or equivalent math pathway) with a minimum grade of B <u>or</u> retest at Level 3.	
<u>Level 1: Needs Substantial Support</u> **SBAC**: Level 1 or **SAT Math**: <390; or **ACT Math**: <16; or **Compass**: <53 Pre-Algebra (See Note 4)	Not exempt from remediation. Additional placement information determined by local post-secondary institutional processes needed for all entry-level courses. If student retests and earns a higher score then he/she follows that level of rubric.	➢ These criteria basically define a student positioned below Math 025. ➢ Post-high school students should consider enrolling in an adult basic education program for support and guidance.
Placement options apply to students who…	Go directly into higher education after high school, i.e., the fall term of the academic year following their high school cohort graduation.	

* No matter the student's performance level, he or she is expected to take an appropriate math course during the 12th grade.

Notes to Mathematics Table:

1. The SAT, ACT, and Compass criteria are taken from Idaho public higher education institutions. Currently cut scores for these assessments vary by institution. Thus, the scores listed here are an amalgam of these institutions' current cut scores for entry into various levels of mathematics. Importantly, the cut scores are currently under review by the Idaho State Board of Education. Once the revised scores are available, they will replace those in the current framework.

2. The 11th-12th Grade College Readiness Framework Committee recommends that a work group be formed to explore college readiness transition courses with the goal of articulating in greater detail how these should be operationalized in Idaho.

3. State Board Policy 3Y underscores the importance of high school advisors being actively involved as students select dual credit courses. It also states that parents need to be informed about dual credit courses and the benefits and potential pitfalls from their son or daughter enrolling in such courses. For students scoring at Level 3, general education dual credit courses may present formidable academic challenges. Thus, advisors should help students carefully select such courses while keeping parents and caregivers apprised of the selections being made and the underlying rationale for them.

<u>Proposed English Language Arts (ELA) Framework</u>

11th Grade English Language Arts Performance		
Performance Level*	**Student Status and Conditions**	**Additional Comments**
<u>Level 4: Exempt</u> **SBAC**: Level 4; or **SAT Critical Reading:** 450-560; or **ACT English:** 18-24; or **Compass Writing:** 70-94; or	Exempt from non-credit-bearing course work. Placement into entry college-level English course (including but not limited to English Composition or its equivalent).	➢ Students are expected and should be advised to take dual credit and other opportunities for earning college credit during 12th grade. ➢ These criteria basically define a student ready for at least ENG

Transcript: Completion of AP English Language and Composition with 3 or better score on test or dual credit 1st year writing course (See Note 1) **Note:** SAT, ACT and Compass cut scores are currently under review by the SBOE (See Note 2)	**Maintaining Level 4 Exempt**: Complete one or more senior level writing courses (See Note 1).	101P or ENG 101.
Level 3: Conditionally Exempt **SBAC**: Level 3; or **SAT Critical Reading**: 200-449; or **ACT English:** <18; or **Compass Writing**: 47-69	Exempt from remediation for placement into "co-requisite" or "supported" entry college-level English course (including but not limited to English Composition or its equivalent, e.g., ENG 101/192, ENG 101P). **Achieving Level 4 Exempt**: Complete a two semester senior level writing course with minimum grades of B or retest at Level 4 or successfully complete an Idaho-approved ELA college readiness transition course or successfully complete dual credit 1st year writing course or complete AP English Language and Composition with 3 or better score on test. (See Notes 3 & 4). **Maintaining Level 3 Conditionally Exempt:** Complete senior level English course.	➢ These criteria basically define a student ready for ENG 101/192, ENG 101P, or equivalent.
Level 2: Needs Support **SBAC**: Level 2; or **SAT Critical Reading**: <200; or **ACT English:** <18; or **Compass Writing**: 16-46	Not exempt from remediation. **Achieving Level 3 Conditionally Exempt**: Complete senior level English course with a minimum grade of B or retest at Level 3.	➢ Post-high school students should consider enrolling in an adult basic education program for support and guidance.
Level 1: Needs Substantial Support **SBAC**: Level 1; or **SAT Critical Reading**: <200; or **ACT English:** <18; or **Compass Writing**: <16	Not exempt from remediation. Additional placement information determined by local post-secondary institutional processes needed for all entry-level courses. If student retests and earns a higher score then he/she follows that level of rubric.	➢ Post-high school students should consider enrolling in an adult basic education program for support and guidance.
Placement options apply to students who…	Go directly into higher education after high school**,** i.e., the fall term of the academic year following their high school cohort graduation.	

* No matter the student's performance level, he or she is expected to take an appropriate ELA course during the 12th grade.

Notes to ELA Table:

1. AP English Language and Composition is specified instead of AP English Literature and Composition because of the need for high school level courses focused on the elements of writing instead of courses focused on analysis and interpretation of literature. It is usually the case that high school senior

English courses do not incorporate as intense a focus on writing as that found in entry level credit bearing English courses in college, causing many students to enter college not having had experience in writing intensive courses. This misalignment between high schools and colleges is a significant problem. Thus the committee recommends that AP English Language and Composition be designated because of its greater emphasis on the elements of writing. The committee also recommends that efforts be immediately initiated to align curricula and instruction between high schools and colleges so that consistent expectations around writing are communicated to students beginning as early as possible in the secondary grades. This will require high school curricula include more writing intensive courses. We make this recommendation with full understanding that building such courses into secondary schools will come with significant costs, but we believe these costs must be born since not doing so will only perpetuate the misalignment. We also recommend that Idaho higher education faculty who have direct responsibility for first year writing courses, both their administration and teaching, be key partners with their secondary English education counterparts in alignment efforts. The higher education faculty look forward to conversations and sustained professional development with their secondary education colleagues.

2. The SAT, ACT, and Compass criteria are taken from Idaho public higher education institutions. Currently cut scores for these assessments vary by institution. Thus, the scores listed here are an amalgam of these institutions' current cut scores for entry into various levels of English. Importantly, the cut scores are currently under review by the Idaho State Board of Education (SBOE). Once the revised scores are available, they will replace those in the current framework. Additionally, Idaho higher education institutions along with the SBOE are transitioning into employing initial course placement frameworks that emphasize multiple measures. College Readiness Framework Committee members thus wish to emphasize that institutions are rapidly moving away from relying on single assessment scores for initial course placement and wish to underscore the importance of multiple measures in first year writing course placement decisions.

3. The 11^{th}-12^{th} Grade College Readiness Framework Committee recommends that a work group be formed to explore in greater detail college readiness transition courses with the goal of articulating in greater detail how these should be operationalized in Idaho.

4. State Board Policy 3Y underscores the importance of high school advisors being actively involved as students select dual credit courses. It also states that parents need to be informed about dual credit courses and the benefits and potential pitfalls from their son or daughter enrolling in such courses. For students scoring at Level 3, general education dual credit courses may present formidable academic challenges. Thus, advisors should help students carefully select such courses while keeping parents and caregivers apprised of the selections being made and the underlying rationale for them.

[1]Some language in this document is taken from the State of Washington's document entitled "Introduction to the Draft Recommendations for the Use of the Smarter Balanced 11^{th} Grade Assessment by Washington Institutions of Higher Education." The document was circulated to all Smarter Balanced Assessment Consortium Higher Education Leads during winter, 2014. We wish to thank Washington for allowing us to draw from their work.

Chairperson Comments

Planning Policy and Governmental Affairs Committee Chairman's comments about the recommendation to remove/alter the existing college placement exam.

In making this recommendation, the intent of the committee was to add a high level of flexibility for high school juniors to:

1) Differentiate based on students for post high school plans
2) Minimize the pressure of the 11th grade accountability year (the current recommendation moves the ISAT to the 11th grade)

The committee was mostly concerned that the statewide SAT day was not a one size fits all. The group recognizes and endorses the need to remove financial barriers for all students and the positive effects of having students take entrance exams that encourage them to go on. There has been some discussion by the Accountability Oversight Committee since the Board sent the recommendation in April back to the committee. I will propose the following with the motive of keeping the integrity of the majority of the committee and balancing the need to encourage the State Board goals, maintain legislative support and stay in line with the Governor's overall education goals.

Proposal:
Maintain the current college entrance exam requirement and alter the administration of it.
1) The current rule requires that all students take a college entrance exam. The state pays for the SAT although the ACT fulfills that requirement. Not all school districts use the SAT. Some pay for the ACT (Sugar-Salem) or use another measure (alternative schools - Compass). Outside of the SAT, those tests are on the dime of the district or the student even though they fulfill the graduation requirement.
2) The alteration would come by allowing other college entrance exams to be paid for by the state adding increased flexibility for students. The committee had also expressed the need to find a work readiness test that could fulfill the requirement. The Division of Career Technical Education has approved technical skills assessments that may be able to serve this need, however, additional work will need to be done in this area prior to identifying meaningful work readiness tests.
3) The rule (IDAPA 08.02.03.105.03) states that if juniors miss the state paid day, they can take an exam prior to the end of their 12th grade year. The timeline for SAT and ACT are generally outside of the window of the ISAT and could therefore be scheduled to suit the student.

There will be a healthy discussion of the recommendations. But, Linda and I believe maintaining the rule with a change in the state administration of the college entrance exam(s) will satisfy several needs. Again, we can discuss the implications of all the recommendations and proposals at the meeting.

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SUBJECT

Education Opportunity Resource Committee Appointment

APPLICABLE STATUTE, RULE, OR POLICY

Section 33-5603, Idaho Code – Education Opportunity Resource Committee

BACKGROUND/DISCUSSION

During the 2016 Legislature SB 1334 (2016) created a new chapter of Idaho Code, title the Education Opportunity Resource Act. The purpose of this act is to establish a resource for Idaho's education library system in providing broadband and related services to students, and to support Idaho's E-rate eligible entities with technical, contracting and procurement guidance. To this end the Education Opportunity Resource Committee was established. The members of the committee are to include:

- The State Superintendent (or designee),
- One (1) member appointed by the State Board of Education,
- Three (3) member appointed by the Idaho association of school administrators (based on school district student enrollment),
- The State Librarian (or designee), and
- Two (2) school technology personnel appointed by the Idaho Education Technology Association.

Pursuant to Section 33-5604, Idaho Code, the Committee is charged with focusing on the broadband and related service needs of all E-rate eligible entities, and at a minimum:

(1) Make budget and policy recommendations to the state department of education regarding:
  (a) Broadband parameters;
  (b) Incentives for E-rate eligible entities to obtain the most appropriate service that best fits such entities' broadband needs and that is fiscally responsible; and
  (c) The minimum and maximum service levels, the quality of services and the minimum per student or person internet level that contracts must adhere to for E-rate eligible entities to be eligible for state reimbursement;
(2) Establish reimbursement methodology that includes, but is not necessarily limited to, the following components:
  (a) Distribution of appropriated moneys to E-rate eligible entities that have received E-rate funding. Distribution of such moneys must be in an amount equal to the non-E-rate reimbursed cost of internet services; and
  (b) If E-rate funding is not available to an E-rate eligible entity, reimburse the entity for its internet service costs;
(3) Compile and analyze broadband utilization statistics from E-rate eligible entities to determine the levels of internet services necessary for such entities and report the statistics to the state department of education, and E-rate eligible

entities shall cooperate with the committee in carrying out its duty to compile and analyze such information;

(4) Advise and recommend resources to assist the state department of education in carrying out its responsibility to provide E-rate application assistance and support to E-rate eligible entities;
(5) Not provide legal advice;
(6) Collaborate with other relevant governmental and nongovernmental entities to ensure best practices in broadband are used and to recommend the terms of contracts for broadband and related services; and
(7) Ensure compliance with appropriate purchasing laws.

At this time Andy Mehl is being nominated for consideration as the Board of Education appointed member of the committee.

Andy Mehl has been managing the Postsecondary Statewide Longitudinal Data System (SLDS) for the Office of the State Board of Education since August 2010. In that capacity he has built the system from scratch and also applied for and received a federal SLDS grant for which he serves as Program Director. Additionally, Mr. Mehl chairs the architecture group for the Western Interstate Council on Higher Education (WICHE) multistate data exchange pilot project (phase 2). Prior to joining the Office of the State Board of Education, Mr. Mehl was most recently an IT Director at URS and managed the Project Management Office (PMO) responsible for IT projects serving over 10,000 users worldwide. He has previously served several other roles in IT including many years as an application developer, analyst, and IT Department Manager at Motivepower. He also spent several years implementing process improvement for Motivepower which drives his desire to streamline processes and eliminate wasted time, effort, and money.

IMPACT

This appointment will fill the Board appointed seat on the committee.

STAFF COMMENTS AND RECOMMENDATIONS

Staff recommends approval.

BOARD ACTION

I move to appoint Andy Mehl to the Idaho Education Opportunity Resource Committee for a four (4) year term effective immediately and expiring on June 30, 2020.

Moved by __________ Seconded by __________ Carried Yes _____ No _____

SUBJECT

Temporary/Proposed Rule, IDAPA 08.01.02 – Rules Governing Postsecondary Credit Scholarship Program

APPLICABLE STATUTES, RULE OR POLICY

Section 33-4605, Idaho Code

BACKGROUND/DISCUSSION

HB 477a (2016) created a new section of code, Section 33-4605, Idaho Code, which created a new state administered scholarship titled the Postsecondary Credit Scholarship. The new program provides a scholarship to all students who have earned ten (10) or more postsecondary credits at the time of high school graduation. Students who earn ten (10) or more credits, but less than twenty (20) credits will be eligible for up to a two thousand dollars ($2,000) spread over two (2) years. Students who earn twenty (20) or more credits but do not earn an associate degree at the time of high school graduation are eligible for up to a four thousand dollars ($4,000) scholarship spread over two (2) years. Students who earn an associate degree at the time of high school graduation are eligible for up to an eight thousand dollars ($8,000) scholarship spread over two (2) years. The final amount of the scholarship is subject the student having obtained a matching business or industry merit based scholarship.

The proposed rule would create a new section of administrative code similar to the Opportunity Scholarship section that would set out the administrative procedures for applying for the scholarship and provide clarification around the required business or industry matching scholarship.

IMPACT

The approval of this proposed rule will set out the administrative procedures and clarify requirements for the new Postsecondary Credit Scholarship.

ATTACHMENTS

Attachment 1 – Proposed Rule changes to IDAPA 08.01.02	Page 3

STAFF COMMENTS AND RECOMMENDATIONS

Proposed rules have a 21 day comment period prior to becoming pending rules. Based on received comments and Board direction, changes may be made to proposed rules prior to entering the Pending stage. All pending rules will be brought back to the board for approval prior to submittal to the Department of Administration for publication in the Idaho Administrative Rules Bulletin as a pending rule. Pending rules become effective at the end of the legislative session in which they are submitted.

Temporary rules go into effect at the time of Board approval unless an alternative effective date is specified by Board action. To qualify as a temporary rule, the rule must meet one of three criteria: provides protection of public health, safety, or welfare; or is to come into compliance with deadlines in amendments to governing law or federal programs; or is conferring a benefit. This rule qualifies as temporary rules as it brings the state in compliance with HB 477a (2016) and Section 33-4602, Idaho code.

Staff recommends approval.

BOARD ACTION

I move to approve the temporary and proposed rule IDAPA 08.01.02, as submitted in Attachment 1.

Moved by____________ Seconded by_____________ Carried Yes____ No____

IDAPA 08
TITLE 01
CHAPTER 02

08.01.02 - RULES GOVERNING THE POSTSECONDAY CREDIT SCHOLARSHIP PROGRAM

000. LEGAL AUTHORITY.
In accordance with Sections 33-105, 33-4601A, and 33-4605, Idaho Code the State Board of Education (Board) shall promulgate rules implementing the provisions of Title 33, Chapter 46, Idaho Code. ( )

001. TITLE AND SCOPE.

01. Title. These rules shall be cited as IDAPA 08.01.02, "Rules Governing the Postsecondary Credit Scholarship Program." ( )

02. Scope. These rules constitute the requirements for the Postsecondary Credit Scholarship Program. ( )

002. WRITTEN INTERPRETATIONS.
In accordance with Section 67-5201(19)(b)(iv), Idaho Code, written interpretations, if any, of the rules of this chapter are available at the Office of the State Board of Education.( )

003. ADMINISTRATIVE APPEALS.
Unless otherwise provided for in the rules of the Board or in the Board Governing Policies and Procedures, all administrative appeals allowed by law shall be conducted as provided herein. ( )

004. INCORPORATION BY REFERENCE.
There are no documents that have been incorporated by reference into these rules.( )

005. OFFICE INFORMATION.

01. Office Hours. The offices of the Board are open from 8 a.m. to 5 p.m., except Saturday, Sunday, and legal holidays. ( )

02. Street Address. The offices of the Board are located at 650 W. State Street, Boise, Idaho. ( )

03. Mailing Address. The mailing address of the Board is P.O. Box 83720, Boise, Idaho 83720-0037. ( )

04. Telephone Number. The telephone number of the Board is (208) 334-2270. ( )

05. Facsimile. The facsimile number of the Board is (208) 334-2632. ( )

06. Electronic Address. The electronic address of the Board of Education at www.boardofed.idaho.gov. ( )

006. PUBLIC RECORDS ACT COMPLIANCE.

These rules are subject to the provisions of the Idaho Public Records Act, Title 74, Chapter 1, Idaho Code. ( )

007. -- 009. (RESERVED)

010. DEFINITIONS.
For the purposes of this section the following definitions shall apply:

01. Board. Means the Idaho State Board of Education.
02. Business Scholarship. Means a competitive scholarship awarded from a business entity registered with the Idaho Secretary of State or other state or federal entity that registers businesses and whose purpose is not postsecondary education nor is the entity affiliated with a postsecondary education institution; or an association representing businesses as described herein.
03. Executive Director. Means the Executive Director for the Idaho State Board of Education.
04. Grade Point Average (GPA). Means the average grade earned by a student, figured by dividing the grade points earned by the number of credits attempted. ( )
05. Industry Scholarship. Means a competitive scholarship in which the recipient must enter into a program of study for a specific occupational area.
06. Merit Based Scholarship. Means a merit based scholarship is one in which a minimum academic standard must be met to be eligible for the scholarship.

011. -- 100. (RESERVED)

101. APPLICATION PROCESS.

01. Initial Applications. An eligible student must complete and submit the scholarship program application to the Board electronically on or before the date specified in the application, but not later than March 1 for consideration of an award during proceeding fall academic term. An applicant without electronic capabilities may submit an application on the form established by the Executive Director through the United States Postal Service, which must be postmarked not later than March 1. Applications received after March 1 of each year must be received at least 60 days prior to the start of the term for which the applicant has enrolled after the fall term. ( )
02. Communication with State Officials. Failure to respond within the time period specified will result in cancellation of the application or forfeiture of the scholarship unless extenuating circumstances are involved and approved by the Executive Director or designee. ( )

102. -- 299. (RESERVED)

300. SCHOLARSHIP AWARDS.

01. Selection Process. Scholarship awards will be based on the availability of scholarship program funds. In the event more eligible applications are received than funds are available, those applications received by March 1 of each year will be awarded based on their GPA ranking. Applications received after March 1 of each year will only be considered after all initial applications have been processed and awardees have accepted or rejected their awards.

02. Monetary Value of the Opportunity Scholarship. The monetary value of the award will be based on the maximum amount the applicant is eligible to receive based on the number of postsecondary credits accepted by the institution they attend and the amount of the matching scholarship for each year they are eligible. The award amount shall not be more than the matching merit based business or industry scholarship received by the applicant within the limits of the maximum eligible amount. ( )

03. Payment. Payment of scholarship award will be made in the name of the recipient and will be sent to the designated official at the eligible Idaho postsecondary educational institution in which the recipient is enrolled. The official must transmit the payment to the recipient student's account within a reasonable time following receipt of the payment. ( )

04. Duration. Scholarships will be awarded on an annual basis and payments will correspond to academic terms, semesters, or equivalent units. In no instance will the entire amount of a scholarship be paid in advance to, or on behalf of, a scholarship recipient. The scholarship is valid for up to four (4) educational years from the date the recipient graduated from high school. Awards are contingent on annual appropriations by the legislature and continued eligibility of the student. ( )

05. Eligibility. If a student receives a scholarship payment and it is later determined that the student did not meet all of the scholarship program eligibility requirements, then the student is considered in overpayment status, and the remaining program funds must be returned to the Office of the State Board of Education. ( )

302. CONTINUING ELIGIBILITY.

To remain eligible for the scholarship, the recipient must comply with all of the provisions of the scholarship program and these rules, in addition to the following requirements: ( )

01. Interruption of Continuous Enrollment. A student may request an interruption of continuous enrollment for eligible students due to military service in the United States armed forces, medical circumstances, or extenuating circumstances approved by the Executive Director. A scholarship recipient whose continuous enrollment is interrupted for more than four (4) months but less than two (2) years for any reason but who intends to re-enroll in an eligible Idaho postsecondary educational institution must file a letter of intent to withdraw no later than sixty (60) days prior to the first day of the academic term of the discontinued attendance to the Office of the State Board of Education. Failure to do so may result in forfeiture of the scholarship. In addition, the individual must file a statement with the Board declaring his intent to re-enroll as a full-time student in an academic or career-technical program in an eligible Idaho postsecondary educational institution for the succeeding academic year no later than thirty (30) days prior to the first day of the academic term in which the individual intends to re-enroll within two (2) years of the approval of the request to withdraw. Failure to do so will result in forfeiture of the scholarship unless an extension has been granted. All requests for extension must be made sixty (60) days prior to the start of the succeeding academic year.

303. -- 999. (RESERVED)

SUBJECT

Temporary/Proposed Rule, IDAPA 08.01.04 – Rules Governing Residency Classification

REFERENCE

June 2011	Board approved proposed rule changes to IDAPA 08.01.04 updating residency requirements for special graduate or professional programs.
November 2011	Board approved pending rule changes to IDAPA 08.01.04., updating residency requirements.

APPLICABLE STATUTES, RULE OR POLICY

Section 33-3717B, Idaho Code

BACKGROUND/DISCUSSION

During the 2016 legislative session the Board proposed amendments to Section 33-3717B, Idaho Code, Residency Requirements. The proposed amendments simplified the requirements for determining residency for students attending a public institution under the direct governance of the State Board of Education. The statutory amendments grant residency status for students who graduated from and Idaho high school or attended and Idaho elementary and/or secondary school for six (6) or more years, in addition to existing requirements for students who are dependents of residents or students who serve in our armed forces. Students who meet the graduation or attendance requirement are now granted residency, for tuition purposes, without having to prove domicile for the previous twelve (12) months IDAPA 08.01.04., provides clarification of the residency requirements pursuant to Section 33-3717B, Idaho Code. Amendments are being proposed to IDAPA 08.01.04 to bring it into compliance with the provisions of Section 33-3717B, Idaho Code.

The proposed rule includes the following amendments:

- Deletes unnecessary definitions for terms that are either no longer used or are defined with the statute itself
- Adds a definition of accredited secondary school and armed forces. These terms were previously undefined.
- Sets out timelines for submitting requests for reclassification of residency determinations.
- Simplifies the factors for determining domicile and specifies which items can be used as factor and which items must be used in conjunction with other factors.
- Simplifies the appeals procedure
- Deletes section that are no longer applicable and makes additional technical changes.

IMPACT

The approval of this proposed rule will bring the rule in compliance with Section 33-3717B and allow for it to move forward for public comment.

ATTACHMENTS

Attachment 1 – Proposed Rule changes to IDAPA 08.01.04 Page 3

STAFF COMMENTS AND RECOMMENDATIONS

Proposed rules have a 21 day comment period prior to becoming pending rules. Based on received comments and Board direction, changes may be made to proposed rules prior to entering the Pending stage. All Pending rules will be brought back to the board for approval prior to submittal to the Department of Administration for publication in the Idaho Administrative Rules Bulletin as a pending rule. Pending rules become effective at the end of the legislative session in which they are submitted.

Temporary rules go into effect at the time of Board approval unless an alternative effective date is specified by Board action. To qualify as a temporary rule, the rule must meet one of three criteria: provides protection of public health, safety, or welfare; or is to come into compliance with deadlines in amendments to governing law or federal programs; or is conferring a benefit. This rule qualifies as temporary rules as it brings the state in compliance with HB 477a (2016) and Section 33-4602, Idaho code.

Board staff worked with the legal counsel and Registrars at each of the institutions in developing the proposed rule. Staff recommends approval.

BOARD ACTION

I move to approve changes to temporary and proposed rule IDAPA 08.01.04, as submitted in Attachment 1.

Moved by____________ Seconded by_____________ Carried Yes____ No____

**IDAPA 08
TITLE 01
CHAPTER 04**

08.01.04 - RULES GOVERNING RESIDENCY CLASSIFICATION THE STATE BOARD OF EDUCATION

000. LEGAL AUTHORITY.
This chapter is adopted under the legal authority of Section 33-3717B, Idaho Code. (5-8-09)

001. TITLE AND SCOPE.
01. Title. The title of this chapter is Residency.
02. Scope. This chapter ~~has the following scope:~~ governs ~~the~~ residency classification for tuition purposes for the four-year institutions and Eastern Idaho Technical College under the ~~supervision~~ governance of the State Board of Education and the Regents of the University of Idaho~~, the University of Idaho, Boise State University, Idaho State University, and Lewis-Clark State College are required to make residency determinations~~ pursuant to Section 33-3717B, Idaho Code~~, and these rules~~. ~~(5-8-09)~~

002. WRITTEN INTERPRETATIONS -- AGENCY GUIDELINES.
Written interpretations to these rules in the form of explanatory comments are available from the Office of the State Board of Education, 650 West State Street, Room 307, Boise, Idaho 83720. (1-1-94)

003. ADMINISTRATIVE APPEALS.
~~Provisions for appeal of a residency determination are set forth in Section 103 of this chapter.~~Unless otherwise provided for in the rules of the State Board of Education or in the State Board of Education Governing Policies and Procedures, all administrative appeals allowed by law shall be conducted as provided herein. ~~(1-1-94)~~

004. INCORPORATION BY REFERENCE.
There are no documents incorporated by reference into these rules.

005. OFFICE -- OFFICE HOURS -- MAILING ADDRESS AND STREET ADDRESS.
The principal place of business of the State Board of Education is in Boise, Idaho.
01. Mailing Address. The mailing address is PO Box 83720, Boise, Idaho 83720-0037.
02. Street Address. The State Board of Education's street address is 650 West State Street, Room 307, Boise, Idaho 83702.
03. Office Hours. The office hours are from 8 a.m. to 5 p.m., except Saturday, Sunday and legal holidays.

00~~4~~6. PUBLIC RECORDS ACT COMPLIANCE.
~~All rules required to be adopted by this chapter are public records.~~ This rules has been promulgated in accordance with the Administrative Procedure Act, Title 67, Chapter 52, Idaho Code, and is a public record. ~~(1-1-94)~~

007. -- 009. (RESERVED).

0~~05~~10. DEFINITIONS.

01. ~~**Resident Student**. For any public institution of higher education in Idaho, resident student is defined in Section 33-3717B, Idaho Code, and specifically includes: (3-29-10)~~

~~**a.** Any student who has one (1) or more parent or parents or court appointed guardians who are domiciled in the state of Idaho for at least twelve (12) months prior to the opening day of the term for which the student matriculates, and the parent or parents or guardians provide at least fifty percent (50%) of the student's support. (5-8-9)~~

~~**b.** Any student who receives less than fifty percent (50%) of his support from a parent, parents, or legal~~

~~guardians and who has continuously resided and maintained a bona fide domicile in the state for twelve (12) months immediately preceding the opening day of the term during which the student proposes to attend primarily for purposes other than educational. (5-8-09)~~

~~**c.** Unless disqualified as a nonresident student as defined in Subsection 005.02, any student who is a graduate of an accredited secondary school in the state of Idaho and who matriculates during the term immediately following such graduation. (1-1-94)~~

~~**d.** The spouse of a person who is classified or is eligible for classification as a resident of the state for purposes of attending a college or university, provided that the institution shall require the filing of proof of marriage by the applicant. (1-1-94)~~

~~**e.** A member of the armed forces of the United States stationed in the state on military orders. (1-1-94)~~

~~**f.** An officer or an enlisted member of the Idaho national guard. (5-8-09)~~

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

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

~~**i.** Any person who has been domiciled in the state, has qualified and would otherwise be qualified under Section 33-3717B, Idaho Code, and who is away from the state for a period of less than thirty (30) months and has not established legal residence elsewhere, provided a twelve-month (12) period of continuous residence has been established immediately prior to departure. However, time spent away from the state while enrolled in a postsecondary education program shall not be included in the thirty (30) months. Such time spent away from the state while enrolled shall include normal academic year breaks, such as summer breaks or breaks between semesters or quarters, that occur prior to the receipt of the postsecondary degree. (3-29-10)~~

~~**j.** A student who is a member of any of the following Idaho Native American Indian tribes, regardless of current domicile, shall be considered an Idaho state resident for purposes of fees or tuition at institutions of higher education: members of the following Idaho Native American Indian tribes, whose traditional and customary tribal boundaries included portions of the state of Idaho, or whose Indian tribe was granted reserved lands within the state of Idaho: (5-8-09)~~

~~i. Coeur d'Alene tribe; (5-8-09)~~

~~ii. Shoshone-Paiute tribes; (5-8-09)~~

~~iii. Nez Perce tribe; (5-8-09)~~

~~iv. Shoshone-Bannock tribes; (5-8-09)~~

~~v. Kootenai tribe. (5-8-09)~~

~~**02.** **Nonresident Student**. Nonresident student is defined in Section 33-3717B, Idaho Code, and includes: (5-8-09)~~

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

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

~~c. A person who is not a citizen of the United States of America, who does not have permanent or temporary resident status or who does not hold "refugee-parolee" or "conditional entrant" status with the United States Immigration and Naturalization Service, or is not otherwise permanently residing in the United States under color of law, and who does not also comply with and meet all applicable sections of Section 33-3717B, Idaho Code, and this chapter.~~ **Accredited Secondary School**. "Accredited secondary school" means an Idaho secondary school accredited by a body recognized by the State Board of Education. ( )

02. Armed forces. "Armed forces" means the United States Army, Navy, Air Force, Marine Corps, Coast Guard and their reserve forces. It does not include the National Guard or any other reserve force. ~~(5-8-09)~~( )

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

~~**04. Continuous Attendance**. For purposes of Subsection 005.01.g., "continuous attendance" means attendance at a college or university for continuing and succeeding semesters or terms excluding summer semesters or terms. (5-8-09)~~

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

~~**06. Term Immediately Following Graduation**. For purposes of Subsection 005.01.c., "the term immediately following graduation" does not include the summer semester or term of a college or university. (1-1-94)~~

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

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

04. Full-time Employment. "Full-time employment" means employment consisting on average of at least 30 hours of service per week, or 120 hours of service per month.

05. Full-time Student. "Full-time student" means a student taking the number of credits set by the State Board of Education to constitute a full course load.

0~~9~~6. Support. "Support" means financial support given to the student during the twelve (12) months preceding the opening date of the term for which resident status is requested, but shall not include educational scholarships or grants provided to the student to attend a postsecondary educational institution. Any student who receives less than fifty percent (50%) support may demonstrate this by showing that he is not claimed as a dependent by a parent or guardian for income tax purposes or that a parent or guardian provides less than fifty percent (50%) of the cost of attending an institution according to the financial aid office of that institution or that other similar evidence exists of parental support such as dental bills, medical bills, etc. (5-8-09)

00~~6~~7. -- 099. (RESERVED)

100. RESIDENT CLASSIFICATION BY ALL INSTITUTIONS.

Any student classified as a resident student for purposes of tuition ~~higher education~~ by one ~~institution~~ of the institutions or Eastern Idaho Technical College ~~must~~ shall be considered a resident by all other institutions. ~~"Institutions" means the University of Idaho, Idaho State University, Boise State University, Lewis-Clark State College, and Eastern Idaho Technical College.~~ ~~(5-8-09)~~

101. RESIDENCY CLASSIFICATION PROCESS.

All requests for residency reclassification must be submitted by the student to the institution by the 10th day of the term in which reclassification is sought. Each institution shall~~is to~~ develop its own procedures to determine the residency status of applicants, disseminate information about the classification process, and determine the documentation required of each applicant to the institution. The institution may require whatever records, documents, or affidavits it deems necessary to classify each applicant correctly. It is the responsibility of the institution to notify the student in a timely manner of the documentation required for the classification process, and it is the responsibility of the student to provide the documentation by the deadline established by the institution. Each student ~~must~~ shall be notified in writing of the residency classification decision ~~made by the institutional personnel responsible for determining residency status~~ within fifteen (15) days of such determination being made. ~~(7-1-93)~~

102. FACTORS FOR DETERMINING DOMICILE.

~~Pursuant to Section 33-3717B, Idaho Code, the overriding factor for determining whether a student is a "resident student" is domicile. For these purposes, the establishment of~~ The following, if supported by documentation, support a claim of domicile in Idaho. ~~occurs when a person is physically present in Idaho primarily for purposes other than educational and can show satisfactory proof that such person is without a present intention to return to another state or acquire a domicile at some other place outside the state and the person has met any other applicable requirements of this chapter. In determining whether a student is domiciled in Idaho primarily for purposes other than educational, the institutions shall consider the following:~~ ~~(5-8-09)~~

~~**01. Domicile Established**. Any of the following, if done for at least twelve (12) months before the term in which the student proposes to enroll as a resident student, proves the establishment and maintenance of domicile in Idaho for purposes other than educational:~~ ~~(5-8-09)~~

01. ~~Single~~ Tax Returns and Employment~~Factors~~. Both of the following, if done for at least twelve (12) months before the term in which the student proposes to enroll ~~as a resident student~~, proves the establishment and maintenance of domicile in Idaho for purposes other than educational:

a. Filing of Idaho state income tax returns covering a period of at least twelve (12) months before the term in which the student proposes to enroll as a resident student, and~~.~~ (5-8-09)

~~b~~b. ~~Permanent f~~Full-time employment or the hourly equivalent ~~thereof~~ in ~~the state of~~ Idaho. (5-8-09)

~~**c.** Ownership by the student of the students living quarters.~~ ~~(5-8-09)~~

~~**02. Rebuttable Presumption**. A student who is enrolled for more than eight (8) hours in any semester or quarter during a twelve (12) month period shall be presumed to be in Idaho for primarily educational purposes. Such period of enrollment shall not be counted toward the establishment of a bona fide domicile in the state unless the student proves, in fact, establishment of a bona fide domicile in the state primarily for purposes other than educational. A student who establishes at least five (5) of the seven (7) factors listed in Subsection 102.03 of these rules, if done for a least twelve (12) months before the term in which the student proposes to enroll as a resident student, proves the establishment and maintenance of domicile in Idaho for purposes other than educational. (5-8-09)~~

~~03~~02. ~~Additional Factors to Determine Domiciliary Intent~~Multiple Factors. ~~A student who establishes at least f~~Five (5) of the ~~seven (7)~~ following factors, if done for at least twelve (12) months before the term in which the student proposes to enroll ~~as a resident student~~, proves the establishment and maintenance of domicile in Idaho for purposes other than educational: ~~(5-8-09)~~

a. Ownership or leasing of a residence in Idaho.

b. Registration and payment of Idaho taxes or fees, other than sales or income tax, ~~.~~ ~~Registration~~including registration and payment of Idaho taxes or fees on a motor vehicle, mobile home, travel trailer, or other item of personal property for which state registration and the payment of state tax or fee is required. ~~(5-8-09)~~

c~~b~~. Registration to vote for state elected officials in Idaho at a general election. (1-1-94)

d~~c~~. Holding of an Idaho driver's license~~. An Idaho~~ or state-issued ~~ID~~ identification card ~~may be used in lieu of an Idaho driver's license~~. ~~(5-8-09)~~

e~~d~~. Evidence of the abandonment of a previous domicile. (1-1-94)

~~**e.** The presence of household goods in Idaho. (1-1-94)~~

f. The establishment of accounts with ~~Idaho~~ financial institutions in Idaho. ~~(5-8-09)~~

g. ~~And~~ Other ~~S~~similar ~~F~~factors ~~I~~indicating ~~I~~intent to ~~B~~be ~~D~~domiciled in Idaho and the ~~M~~maintenance of ~~S~~such ~~D~~domicile. Factors may include, but are not limited to, enrollment of dependent children in Idaho ~~primary~~ elementary or secondary schools, establishment of acceptance of an offer of permanent employment for self in Idaho, ~~or~~ documented need to care for a relative in Idaho, utility statements, or employment documentation.

04. Idaho Elementary and Secondary Students. If a student meets the requirements set forth under Idaho Code, Section 33-3717B(1)(c), that student shall not be required to meet the twelve (12) month requirement for establishing domicile. ~~(5-8-09)~~

103. APPEALS PROCEDURE.

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

01. ~~Internal~~ Institution Appeal. The chief executive officer of each institution or his designee ~~must~~ shall appoint or cause to be appointed a committee of no less than three (3) ~~to~~ nor more than five (5) members who represent faculty and administration and who will constitute a residency review committee. ~~The individual responsible for the initial determination of residency of any student is ineligible for membership on the review committee. The committee will elect a chairman, secretary, or other position as may be deemed necessary to carry out the work of the committee.~~ Within thirty (30) days following receipt of the student's written request to appeal the residency classification decision ~~made pursuant to IDAPA 08.01.04.101~~, the committee must meet and review the ruling. The student appealing is responsible for presenting such evidence as the committee may request and such other evidence as the student may deem pertinent to his residency status. The individual ~~who made~~responsible for the initial residency classification decision ~~pursuant to IDAPA 08.01.04.101~~ may be present, if requested by the committee, ~~to submit such information as he may desire for each case being appealed~~to answer questions from the committee. The student must be notified in writing of the ~~review~~ committee's decision. The decision of the committee is final unless the student elects to appeal ~~further~~the decision to the State Board of Education. ~~(7-1-93)~~

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

~~**104. INTERPRETATIONS RELATING TO RESIDENCY CLASSIFICATION.**~~

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

~~**02. Nonresident Aliens -- Marital Privilege**. Nonresident aliens who marry Idaho residents become~~

~~eligible for residency classification for purposes of higher education, as provided in Section 33-3717B, Idaho Code, upon filing proof of marriage in the admissions office. However, the institutions remain responsible for complying with requirements set forth in regulations of the U.S. Immigration and Naturalization Service relating to non-immigrant alien students until such time as the alien is granted lawful resident alien status by the U.S. Immigration and Naturalization Service. (5-8-09)~~

~~**105. RESIDENCY REQUIREMENTS FOR SPECIAL GRADUATE OR PROFESSIONAL PROGRAMS.**~~

~~**01. Residency Requirement**. As provided in Section 33-3717B, Idaho Code, a residency requirement of at least one (1) calendar year is in effect for certain special graduate and professional programs. (3-29-12)~~

~~**a.** Those programs include, but are not limited to, the WAMI Regional Medical Program, the WICHE Professional Student Exchange Program, the Idaho Dental Education Program, the Creighton Dental Education Program, the WOI Regional Veterinary Program, and the University of Utah Medical Program. (3-29-12)~~

~~**b.** For purposes of this section, the requirement of "at least one (1) calendar year" means a period of twelve (12) consecutive months of continuous residency consistent with the requirements of Section 33-3717B, Idaho Code, immediately prior to the date of application. (3-29-12)~~

~~**02. Appeal to the State Board of Education**. Applicants for the special graduate and professional programs, upon institutional denial of residency status, may petition the Board for a hearing on the denial. The decision to grant such a hearing is discretionary with the Board and will be granted for errors in determination of residency pursuant to Section 33-3717B, Idaho Code. (5-8-09)~~

10~~6~~4. -- 999. (RESERVED)

SUBJECT

Proposed Rule IDAPA 08.01.09 – Rules Governing the GEAR UP Idaho Scholarship Program

REFERENCE

June 23, 2011	Board approved changes to temporary and proposed rule 08.01.09, Rules Governing the GEAR UP Idaho Scholarship program
June 20, 2013	Board approved changes to proposed rule 08.01.09, Rules Governing the GEAR UP Idaho Scholarship program
October 2013	Board approved pending rule, docket 08-0109-1301, amending the GEAR UP Idaho Scholarship.
August 2015	Board approved proposed rule changes to IDAPA 08.01.09, Rules Governing GEAR UP Idaho Scholarship program
November 2015	Board approved pending rule, docket 08-0109-1501, providing efficiencies in the administration of the scholarship awards, as well as provide clarity for individuals applying for the scholarship

APPLICABLE STATUTE, RULE, OR POLICY

Idaho Administrative Code, IDAPA 08.01.09

BACKGROUND/DISCUSSION

The GEAR UP Idaho Scholarship is the scholarship component of the Federal GEAR UP grant. The purpose of the GEAR UP program is to provide targeted early intervention services to students in areas where inadequate academic and financial preparation can make going on to postsecondary education seem unattainable. One component of this program is the scholarship. The original scholarship is available to students who had attended a school participating in the GEAR UP Idaho program and who had participated in the programs early intervention component in grades seven (7) through ten (10). To be eligible for participation in the GEAR UP 1 scholarship, the student must have graduated in 2012, 2013, or 2014. Idaho received a second GEAR UP grant, referred to as GEAR UP 2. The scholarship component of GEAR UP 2 is available to students who will graduate from high school in 2017 and 2018. The student eligibility requirements for the GEAR UP 2 program are slightly different than those of GEAR UP 1.

Due to the changes in federal requirements for this program it will no longer be necessary to have administrative rules governing the scholarship program. Participation and award amounts will be based on the federal program requirements. Based on these requirements, the award amounts for students that graduate in 2017 or 2018 will be the total amount of available funds divided by the total number of eligible applicants.

IMPACT

The proposed changes will bring the rule regarding the student eligibility in alignment with the federal program requirements.

ATTACHMENTS

Attachment 1 – Proposed Rule Changes to IDAPA 08.01.09 Page 3

STAFF COMMENTS AND RECOMMENDATIONS

Proposed rules have a 21 day comment period prior to becoming Pending rules. Based on received comments and Board direction, changes may be made to proposed rules prior to entering the pending stage. All pending rules will be brought back to the board for approval prior to submittal to the Department of Administration for publication in the Idaho Administrative Rules Bulletin as a pending rule. Pending rules become effective at the end of the legislative session in which they are submitted if they are not rejected by the Legislature.

Staff recommends approval.

BOARD ACTION

I move to approve changes to proposed rule IDAPA 08.01.09, repealing IDAPA 08.01.09 in its entirety.

Moved by __________ Seconded by __________ Carried Yes _____ No _____

~~IDAPA 08~~
~~TITLE 01~~
~~CHAPTER 09~~

~~08.01.09 - RULES GOVERNING THE GEAR UP IDAHO SCHOLARSHIP PROGRAM~~

~~000. LEGAL AUTHORITY.~~
~~These rules are promulgated pursuant to the authority of the State Board of Education (Board) under Section 33-105, Idaho Code. (3-29-12)~~

~~001. TITLE AND SCOPE.~~

~~**01. Title**. These rules shall be cited as IDAPA 08.01.09, "Rules Governing the GEAR UP Idaho Scholarship Program." (3-29-12)~~

~~**02. Scope**. These rules constitute the requirements for the GEAR UP Idaho Scholarship Program. (3-29-12)~~

~~002. WRITTEN INTERPRETATIONS.~~
~~In accordance with Section 67-5201(19)(b)(iv), Idaho Code, written interpretations, if any, of the rules of this chapter are available at the Board. (3-29-12)~~

~~003. ADMINISTRATIVE APPEALS.~~
~~Unless otherwise provided for in the rules of the Board or in the Board Governing Policies and Procedures, all administrative appeals allowed by law shall be conducted as provided herein. (3-29-12)~~

~~004. INCORPORATION BY REFERENCE.~~
~~There are no documents that have been incorporated by reference into these rules. (3-29-12)~~

~~005. OFFICE -- OFFICE HOURS -- MAILING ADDRESS AND STREET ADDRESS.~~
~~The principal place of business of the State Board of Education is in Boise, Idaho. (3-29-12)~~

~~**01. Mailing Address**. The mailing address is PO Box 83720, Boise, Idaho 83720-0037. (3-29-12)~~

~~**02. Street Address**. The State Board of Education's street address is 650 West State Street, Room 307, Boise, Idaho 83702. (3-29-12)~~

~~**03. Office Hours**. The office hours are from 8 a.m. to 5 p.m., except Saturday, Sunday and legal holidays. (3-29-12)~~

~~**006. PUBLIC RECORDS ACT COMPLIANCE.**~~
~~These rules are subject to the provisions of the Idaho Public Records Act, Title 74, Chapter 1, Idaho Code. (3-29-12)~~

~~**007. -- 009. (RESERVED)**~~

~~**010. DEFINITIONS.**~~

~~**01. Educational Costs**. Student costs for tuition, fees, room and board, or expenses related to reasonable commuting, books and other expenses reasonably related to attendance a postsecondary educational institution. This cost is determined by the postsecondary institution the student attends and is the institution's published cost of attendance for the academic year for which the student is attending. (3-20-14)~~

~~**02. Eligible Institution**. (3-29-12)~~

~~**a.** A public postsecondary educational institution governed or supervised by the Board, or a board of trustees of a community college established pursuant to the provisions of Chapter 21, Title 33, Idaho Code; or (3-29-12)~~

~~**b.** Any educational organization located in Idaho that is: (3-29-12)~~
~~i. Operated privately; and (3-20-14)~~
~~ii. Classified as not-for-profit under Idaho Code; and (3-20-14)~~
~~iii. Under the control of an independent board and not directly controlled or administered by a public or political subdivision; and (3-29-12)~~

~~iv.Accredited by an organization recognized by the Board, as provided in section 33-2402, Idaho Code. (3-29-12)~~
~~v. Eligible for receipt of federal financial aid funding. (3-29-12)~~

~~**03. Eligible Student**. A student who: (3-29-12)~~
~~**a.** Is an Idaho resident, as defined in Section 33-3717B or 33-2110B, Idaho Code, as applicable to the institution the student is applying to, and who has participated in the early intervention component (7th through 10th grade) of the GEAR UP Idaho program and who has or will graduate from an accredited high school or equivalent in Idaho as determined by the Board in 2012, 2013, or 2014; (3-20-14)~~

~~**b.** Has enrolled or applied as a full-time student in an eligible institution for a minimum of twenty- four (24) credit hours in an academic year. (3-29-12)~~

~~**04. Administrator**. The Executive Director of the Idaho State Board of Education or his designee. (3-29-12)~~

~~**011. -- 099. (RESERVED)**~~

~~**100. OBJECTIVES OF THE GEAR UP IDAHO SCHOLARSHIP PROGRAM.**~~

~~The objectives of the GEAR UP Idaho scholarship program are as follows: (3-29-12)~~

~~**01. Continuation of Education**. To support the continuation of education at the postsecondary level by providing qualified students with a scholarship; and(3-29-12)~~

~~**02. Successful Completion of Program Activities**. To recognize the successful completion of GEAR UP program activities by student participants. (3-29-12)~~

~~**101. ELIGIBILITY.**~~

~~**01. Eligible Student**. An applicant must be less than twenty-two (22) years of age at the time the student first receives a scholarship award. (3-20-14)~~

~~**02. Undergraduate Student**. An applicant must be enrolled full-time in an undergraduate program at an eligible institution. A student enrolled in an undergraduate program is eligible for consideration for a scholarship award, even if some of the student's courses are at the graduate level. (3-20-14)~~

~~**102. -- 199. (RESERVED)**~~

~~**200. APPLICATION PROCESS.**~~

~~**01. Initial Applications**. (3-29-12)~~

~~**a.** An applicant must complete and submit the GEAR UP Idaho Scholarship Application to the Board electronically on or before the date specified in the application, but not later than March 1 of the year the student will graduate from a secondary school or its equivalent. An applicant without electronic capabilities may receive assistance in completing the electronic application from a high school counselor or from State Board of Education scholarship staff. The application may also be submitted to the GEAR UP Idaho Scholarship Administrator through the United States Postal Service, which must be postmarked no later than March 1. (3-20-14)~~

~~**b.** An applicant must complete and submit the Free Application for Federal Student Aid (FAFSA) on or before March 1 of the year student will graduate from secondary school or its equivalent. (3-20-14)~~

~~**02. Announcement of Award**. Announcement of award recipients will be made no later than May 1. (3-20-14)~~

~~**03. Communication with State Officials**. Applicants must respond to any communication from officials of the GEAR UP Idaho Program by the date specified. Failure to respond within the time period specified will result in cancellation of the application or forfeiture of the scholarship. (3-20-14)~~

~~**201. -- 299. (RESERVED)**~~

~~**300. SELECTION CRITERIA.**~~

~~**01. Academic Eligibility**. (3-29-12)~~

~~**a.** Applicants for the GEAR UP Idaho scholarship are granted as recipients, in part, on the basis of their academic performance. The applicant's ACT composite or SAT combined reading and math score are used to determine an applicant's academic rank. (3-20-14)~~

~~**b.** The academic ranking constitutes twenty percent (20%) of the selection ranking. (3-29-12)~~

~~**c.** ACT Composite or SAT combined reading and math Score. Academic applicants must take the ACT or SAT reading and math exam. The highest composite score from any single test administration taken prior to the application deadline will be considered. (3-20-14)~~

~~**02. Financial Eligibility**. (3-29-12)~~

~~**a.** Applicants for GEAR UP Idaho scholarship are selected as recipients, in part, on the basis of demonstrated financial need. The tool used to determine financial need will be the FAFSA, used by the United States Department of Education. The financial need of an applicant for a GEAR UP scholarship will be based upon the validated expected family contribution, as identified by the FAFSA Student Aid report. (3-20-14)~~

~~**b.** The financial need factor, as determined by FAFSA, will constitute sixty percent (60%) of the weighting for the selection of recipients of GEAR UP scholarships. (3-29-12)~~

~~**03. Participation Eligibility**. (3-29-12)~~

~~**a.** Applicants for GEAR UP Idaho scholarships must have attended or is attending a school participating in the GEAR UP Idaho program and are selected in part on the basis of their participation in GEAR UP activities. (3-20-14)~~

~~**b.** Participation is reported in hours. Participation is determined based upon the hours a GEAR UP applicant participated in available GEAR UP early intervention program activities offered at their school. Applicants will be compared to other applicants from the same school. GEAR UP participation hours shall be provided by the GEAR UP school the student participated in. (3-20-14)~~

~~**c.** The participation factor shall constitute twenty percent (20%) of the selection ranking. (3-20-14)~~

~~**301. -- 399. (RESERVED)**~~

~~**400. GEAR UP IDAHO SCHOLARSHIP AWARD.**~~

~~**01. Distribution**. GEAR UP Idaho scholarships will be awarded at each school that has participated in the GEAR UP Idaho program, with distribution based on school population in relation to the over-all state GEAR UP population. (3-20-14)~~

~~**02. Monetary Value of the Gear Up Idaho Scholarship**. (3-29-12)~~

~~**a.** The monetary value of the GEAR UP Idaho scholarship award shall be determined based on a student's financial need, academic merit, and participation factor. (3-20-14)~~

~~**b.** If the applicant is awarded a Pell Grant, the minimum award shall not be less than the applicant's Pell Grant award. (3-20-14)~~

~~**c.** The total amount of financial aid from all sources shall not exceed the student's total educational costs. (3-29-12)~~

~~**03. Payment**. Payment of scholarship awards will be made in the name of the recipient and will be sent to a designated official at the eligible institution in which the recipient is enrolled. The official must transmit the payment to the recipient within a reasonable time following receipt of the payment. (3-29-12)~~

~~**04. Duration**. Scholarships will be awarded on an annual basis and payments will correspond to academic terms, semesters, quarters, or equivalent units. In no instance will the entire amount of a scholarship be paid in advance to, or on behalf of, a scholarship recipient. The scholarship covers up to one (1) educational year or equivalent for attendance at an eligible institution. (3-20-14)~~

~~**05. Eligibility**. If a student receives a scholarship payment and it is later determined that the student did not meet all of the eligibility requirements, then the student is considered in overpayment status, and must return program funds in accordance with the eligible institution's refund policy. (3-29-12)~~

~~**401. -- 499. (RESERVED)**~~

~~**500. CONTINUING ELIGIBILITY.**~~
~~To remain eligible for renewal of a GEAR UP Idaho scholarship, the recipient must comply with all of the provisions of the GEAR UP Idaho Program and these rules, in addition to the following requirements: (3-29-12)~~

~~**01. Renewal Application**. A scholarship recipient must complete and submit a renewal application in order to be considered for a continuing scholarship for each succeeding year. A completed application for the renewal of a GEAR UP Idaho scholarship must be submitted to the Board electronically by the date established on~~

~~the application, but not later than March 1 to be eligible to receive the award for the next academic year. An applicant without electronic capabilities may submit an application on the form established by the GEAR UP Idaho Program administrator through the United States Postal Service, which must be postmarked no later than March 1. In addition, a scholarship recipient must update and submit the FAFSA on or prior to March 1 to be eligible to receive the award for the next academic year. Applications received after this date may be considered for awards for the next academic year contingent on availability of funds, continued eligibility, and attending institution deadlines. (3-25-16)~~

~~**02. Credit Hours**. To remain eligible for renewal of a scholarship award, the scholarship recipient must be enrolled as a full-time student and have completed a minimum of twenty-four (24) credit hours or its equivalent for the academic year in which the student received a scholarship award. (3-20-14)~~

~~**03. Satisfactory Academic Progress**. To remain eligible for renewal of a scholarship, the scholarship recipient must have maintained a minimum cumulative grade point average of two point zero (2.0) on a scale of four point zero (4.0) during the time that the recipient received an award, and must be maintaining satisfactory academic progress, consistent within federal financial regulations as implemented at the eligible Idaho postsecondary educational institution at which the scholarship recipient was enrolled. (3-20-14)~~

~~**04. Transfer Students**. Scholarship recipients who transfer to another eligible institution remain eligible for scholarship renewal and must inform the administrator no later than the end of the next academic period following the transfer.(3-25-16)~~

~~**05. Maximum Scholarship Award**. The award of a GEAR UP Idaho scholarship shall not exceed the equivalent of ten (10) continuous semesters or the equivalent of five (5) continuous academic years. (3-25-16)~~

~~**501. -- 599. (RESERVED)**~~

~~**600. MISCELLANEOUS PROVISIONS.**~~

~~A scholarship recipient whose continuous enrollment is interrupted for more than four (4) months for any reason but who intends to re-enroll in an eligible Idaho postsecondary educational institution must file a letter of intent to interrupt continuous enrollment no later than thirty (30) days prior to the first day of the academic term of the discontinued attendance. Failure to do so may result in forfeiture of the scholarship. The Board will review each request for interruption and notify the individual of approval or denial of the request. In addition, the individual must file a statement with the Board declaring his intent to re-enroll as a full-time undergraduate student in an academic or professional-technical program in an eligible Idaho postsecondary educational institution for the succeeding academic year no later than thirty (30) days prior to the first day of the academic term in which the individual intends to re-enroll. An extension of interruption of continuous enrollment period may be granted for eligible students due to military service in the United~~

~~States armed forces, medical circumstances, or other circumstances approved by the state board of education's executive director. All requests for extension must be made thirty (30) days prior to the start of the succeeding academic year. (3-25-16)~~

~~**601. -- 699. (RESERVED)**~~

~~**700. RESPONSIBILITIES OF ELIGIBLE IDAHO POSTSECONDARY EDUCATIONAL INSTITUTIONS.**~~

~~**01. Statements of Continuing Eligibility**. An eligible institution participating in this GEAR UP Idaho Scholarship Program must submit statements of continuing student eligibility to the administrator by the 30th day after the end of each academic term. Such statements must include verification that the scholarship recipient is still enrolled, attending full time, maintaining satisfactory academic progress, and has not exceeded the award eligibility terms. (3-20-14)~~

~~**02. Other Requirements**. An eligible institution must: (3-29-12)~~

~~**a.** Be eligible to participate in Federal Title IV financial aid programs, and must provide prompt notification regarding any changes in this status to the State Board of Education; (3-29-12)~~

~~**b.** Provide data on student enrollment and federal, state, and private financial aid for students to the administrator; and (3-20-14)~~

~~**c.** Agree to permit periodic GEAR UP Idaho Scholarship Program audits to verify compliance with these rules. (3-29-12)~~

~~**701. ADMINISTRATION.**~~
~~The administrator is responsible for: (3-20-14)~~

~~**01. Information**. Releasing any public information regarding the GEAR UP Idaho Scholarship Program; (3-29-12)~~

~~**02. Recipient Determination**. Determination of scholarship recipients; (3-29-12)~~

~~**03. Payment Procedures**. Determination of procedures for payment of scholarships to recipients; (3-29-12)~~

~~**04. Accounting**. Maintaining fiscal controls and accounting procedures;(3-29-12)~~

~~**05. Program Management**. Authorizing release of all forms, affidavits, and certification necessary for the operation of the program. (3-29-12)~~

~~**703. -- 799. (RESERVED)**~~

~~**800. APPEALS.**~~

~~Any scholarship applicant or recipient adversely affected by a decision made under provisions of these rules may appeal such adverse decision as follows. The scholarship applicant or recipient must appeal in writing no later than thirty (30) days following notice of the decision, and the written statement must include a statement of the reason the scholarship applicant or recipient believes the decision should be changed. The appeal must be submitted to the administrator, who must acknowledge receipt of the appeal within seven (7) days. The administrator shall forward the appeal to the President of the Board. The Board may or may not agree to review the action, or may appoint a subcommittee of three (3) persons, including at least one (1) financial aid administrator at an eligible postsecondary educational institution in Idaho. (3-20-14)~~

~~**01. Transmittal to Subcommittee**. If the appeal is transmitted to the subcommittee, the subcommittee will review the appeal and submit a written recommendation to the President of the Board within fifteen (15) days from the time the subcommittee receives the appeal document. The scholarship applicant or recipient initiating the appeal will be notified by the chairperson of the subcommittee of the time and place when the subcommittee will consider the appeal and will be allowed to appear before the subcommittee to discuss the appeal. (3-20-14)~~

~~**02. Subcommittee Recommendations**. Following the subcommittee's decision, the President of the Board will present the subcommittee's recommendation to the full Board at the next regularly scheduled meeting of the Board. The scholarship applicant or recipient initiating the appeal may, at the discretion of the President of the Board, be permitted to make a presentation to the Board. (3-20-14)~~

~~**03. Board Decision**. The decision of the Board is final, binding, and ends all administrative remedies, unless otherwise specifically provided by the Board. The Board will inform the scholarship applicant or recipient in writing of the decision of the Board. (3-20-14)~~

~~**801. -- 999. (RESERVED)**~~

SUBJECT

Temporary/Proposed Rule 08.02.01.801, Rules Governing Administration – Continuous Improvement Plans

REFERENCE

June 2014	Board approved temporary and proposed rule 08.02.01 – Strategic Planning, creating the requirements for training reimbursement
November 2014	Board approved pending rule IDAPA 08.02.01 – Strategic Planning
June 2015	Board approved a legislative idea to implement the Task Force subcommittee recommendation on continuous improvement plan reporting
August 2015	Board approved proposed rule 08.02.01.801 – Continuous Improvement Plans, updating the terms to bring the rule in alignment with legislative changes.
September 2015	Board approved legislation to implement the Task Force subcommittee recommendation on continuous improvement plan reporting
November 2015	Board approved pending rule 08.02.01.801 – Continuous Improvement Plans.

APPLICABLE STATUTE, RULE, OR POLICY

Sections 33-320, 33-1212A, Idaho Code

BACKGROUND/DISCUSSION

Pursuant to Section 33-320, Idaho Code, as amended (HB 560, 2016), the State Board of Education (Board) is required to establish “statewide student readiness and improvement metrics” in three (3) grade bands (elementary, middle, and secondary grades) as well as in reading readiness in grade 1 through 4. School district are then required to report these metrics in their annual Continuous Improvement Plans. Pursuant to Section 33-1212A, Idaho Code, as amended (SB 1290, 2016) requires the Board to specify minimum student outcomes for school districts to use when reporting on the effectiveness of their college and career advising and mentoring programs and requires school districts to report these outcomes as part of their Continuous Improvement Plans.

The proposed amendments to IDAPA 08.02.01.801 will set out these metrics and outcomes, as well as administrative reporting requirements. To properly determine progress in any of these areas requires the use of multiple measures. The proposed metrics will provide for a statewide minimum that is used consistently around the state allow school districts to select any additional measures they wish to use to inform them of their students readiness levels at the given grade bands.

Board staff discussed with stakeholder groups options on measures that are currently used statewide and would not require the creation of a new measure that may not be able to be tracked in all districts. Based on these discussions the following minimum metrics are being proposed:

- Career and college readiness metric: college entrance exam
- High school readiness metric: proficiency on the 8th grade Idaho Standards Achievement Test
- Grade 7 readiness metric: proficiency on the 6th grade Idaho Standards Achievement Test
- Grade 4 reading readiness metric: proficiency at the 3rd grade level on the statewide reading assessment
- Grade 3 reading readiness metric: proficiency at the spring 2nd grade level on the statewide reading assessment
- Grade 2 reading readiness metric: proficiency at the spring 1st grade level on the statewide reading assessment
- Grade 1 reading readiness metric: proficiency at the spring kindergarten grade level on the statewide reading assessment

Improvement metrics would show the percent of year over year growth at each level.

The addition of the statewide student readiness and improvement metrics at the three grade levels is the implementation of one of the Accountability and Autonomy Task Force subcommittee recommendations in 2014. The addition of the reading readiness metrics was a result of legislative action regarding the reading literacy initiative.

IMPACT

Approval of the proposed rule will bring the rule in compliance with section 33-320 and 1212A, Idaho Code and provide the school districts guidance on the new reporting requirements.

ATTACHMENTS

Attachment 1 – Temporary/Proposed Rule Changes to IDAPA 08.02.01.801 Page 5

STAFF COMMENTS AND RECOMMENDATIONS

Proposed rules have a 21 day comment period prior to becoming pending rules. Based on received comments and Board direction, changes may be made to proposed rules prior to entering the Pending stage. All pending rules will be brought back to the board for approval prior to submittal to the Department of Administration for publication in the Idaho Administrative Rules Bulletin as a pending rule. Pending rules become effective at the end of the legislative session in which they are submitted.

Temporary rules go into effect at the time of Board approval unless an alternative effective date is specified by Board action. To qualify as a temporary rule, the rule must meet one of three criteria: provides protection of public health, safety, or welfare; or is to come into compliance with deadlines in amendments to governing law or federal programs; or is conferring a benefit. This rule qualifies as temporary rules as it brings the state in compliance with HB 560 (2016) and Section 33-320, Idaho code and SB 1290 (2016) and Section 33-1212A.

Staff recommends approval.

BOARD ACTION

I move to approve changes to temporary and proposed rule IDAPA 08.02.01.801, as submitted in Attachment 1.

Moved by __________ Seconded by __________ Carried Yes _____ No _____

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IDAPA 08
TITLE 02
CHAPTER 01

08.02.01 - Rules Governing Administration

801. CONTINUOUS IMPROVEMENT PLANNING AND TRAINING.
In accordance with Section 33-320, Idaho Code, every local education agency (LEA) shall develop and maintain a strategic plan that includes a continuous improvement process focused on improving student performance of the LEA. (3-25-16)

01. Definitions. (4-11-15)

a. Administrator. As used in this section administrator means the superintendent of the school district or administrator of a charter school. (4-11-15)

b. Board. Board means the Idaho State Board of Education. (4-11-15)

c. Executive Director. Executive Director means the Executive Director of the Idaho State Board of Education. (4-11-15)

d. Local Education Agency Board. As used in this section local education agency or LEA Board means the board of trustees of a school district or board of directors of a charter school. (4-11-15)

e. Local Education Agency. As used in this section local education agency (LEA) means public school district or charter school. (4-11-15)

f. Continuous Improvement Plan. As used in this section, a continuous improvement plan focuses on annual measurable outcomes and the analysis of data to assess and prioritize needs and measure outcomes. (3-25-16)

02. Reimbursement Eligibility. LEA's may request reimbursement for training conducted pursuant to Section 33-320, Idaho Code. To be eligible for reimbursement the training and trainer must meet the following criteria: (4-11-15)

a. Training. The training must cover one (1) or more the follow subjects: (4-11-15)

i. Continuous improvement planning training. Continuous improvement planning training must include, but is not limited to, training on continuous process improvement, use and analysis of data, and methods for setting measurable targets based on student outcomes; (3-25-16)

ii. School finance; (4-11-15)

iii. Administrator evaluations, including, but not limited to, specifics on the

Idaho state evaluation requirements and framework; (4-11-15)

iv. Ethics; or (4-11-15)

v. Governance. (4-11-15)

b. Documentation of Training. Training records shall be kept by the LEA showing: (4-11-15)

i. The length of the training in hours; (4-11-15)

ii. The subject(s) covered by the training; (4-11-15)

iii. The participants included in the training or validation of attendance of specific participants as applicable; and (4-11-15)

iv. The curriculum, agenda, or other documentation detailing the content of the training. (4-11-15)

c. Training Format. A majority of the LEA board and the administrator must collaborate on the continuous improvement plan and engage students, parents, educators and the community, as applicable to the training subject and format. The training facilitator must be physically present or have the ability to interact directly with all training participants. Sufficient time must be provided during the sessions to give the participants an opportunity to discuss issues specific to the LEA. (3-25-16)

d. Trainer Qualifications. The trainer must meet the following qualifications: (4-11-15)

i. May not be a current employee of the LEA; (4-11-15)

ii. Must have two (2) years of documented training experience in the area of training being provided for the LEA; and (4-11-15)

iii. Must provide at least three (3) recommendations from individuals who participated in past training sessions conducted by the trainer. These recommendations must be included with the application to determine the trainer's qualifications. (4-11-15)

e. Qualified Trainers. Trainer qualifications will be determined by the Office of the State Board of Education. The State Board of Education will maintain a list of qualified trainers and the subject areas in which they are qualified. (4-11-15)

i. An individual or company may submit an application for consideration to be placed on the list of qualified trainers or the LEA may submit the application on behalf of the individual or company. (4-11-15)

ii. Applications must be submitted to the Executive Director in a format established by the Executive Director. (4-11-15)

iii.
Trainer qualifications must be determined prior to the LEA's request for reimbursement of training costs. (4-11-15)

~~**03. Reimbursement**. Up to two thousand dollars ($2,000) per state fiscal year will be reimbursed to the LEA for training costs. Reimbursement will be based on actual expenditures related to the training delivered.~~
~~(4-11-15)~~

~~04~~03. **Audit**. If requested, LEA's must provide training documentation or other information to verify eligibility prior to reimbursement. (4-11-15)

04. Statewide Continuous Improvement Measures. Multiple measures must be used to fully determine student readiness and improvement. At a minimum each continuous improvement plan shall include the statewide student readiness and improvement metrics. The benchmark for each metric shall be set by the LEA.

a. The career and college readiness metric shall be the number and percentage of students meeting the college ready benchmark in mathematics and English Language Arts on a state recognized college entrance exam. Improvement shall be measured by year over year growth in the percentage of students meeting the college readiness benchmark.

b. The high school readiness metric shall be the number and percentage of students meeting proficient or advanced on the grade 9 Idaho standards achievement test in mathematics and English language usage. Improvement shall be measured by year over year growth in the percentage of students scoring proficient or advanced.

c. The grade 7 readiness metric shall be the number and percentage of students meeting proficient or advanced on the grade 6 Idaho standards achievement test in mathematics and English language usage. Improvement shall be measured by year over year growth in the percentage of students scoring proficient or advanced.

d. The grade 4 reading readiness metric shall be the number and percentage of students reading at grade level on the spring grade 3 statewide reading assessment. Improvement shall be measured by year over year growth in the percentage of students scoring at grade level.

e. The grade 3 reading readiness metric shall be the number and percentage of students reading at grade level on the spring grade 2 statewide reading assessment. Improvement shall be measured by year over year growth in the percentage of students scoring at grade level.

f. The grade 2 reading readiness metric shall be the number and percentage of students reading at grade level on the spring grade 1 statewide reading assessment. Improvement shall be measured by year over year growth in the percentage of students scoring at grade level.

g. The grade 1 reading readiness metric shall be the number and percentage of students reading at grade level on the spring kindergarten statewide reading assessment. Improvement shall be measured by year over year growth in the percentage of students scoring at grade level.

05. Annual Literacy Intervention Plan. Annually each LEA will report on the effectiveness of the LEA's literacy intervention plan. Reports shall include at a minimum:

a. Summary of literacy interventions used at each grade level.
b. Previous year literacy intervention expenditures.
c. Projected literacy plan budget for current school year.
d. Metrics chosen by the LEA to determine effectiveness of the literacy plan.
e. Performance on effectiveness metrics.

06. College and Career Advising and Mentoring Plans. Annually each LEA will report on the effectiveness of the LEA's college and career or mentoring plan. Reports shall include:

a. Description of college and career advising model used by the LEA.
b. Summary of advising and or mentoring used at each grade level, grade 7 through 12, as applicable to the grade ranges enrolled with the LEA.
c. Previous year college and career advising and mentoring expenditures. College and career advising and mentoring plans submitted for the 2016-2017 school year must show how the additional funds received will be used to expand current college and career advising in the schools. Additional funds shall not be used to supplant current efforts.
d. Projected college and career advising and mentoring plan budget for current school year.
e. Metrics chosen by the LEA to determine effectiveness of the college and career advising and mentoring plan.
f. Performance on effectiveness metrics.
g. Number and percent of students who go on to some form of postsecondary education one and two years after graduation.
h. Number of students served by grade.
i. Number of learning plans developed during grade 8 that are reviewed annually by grade level.
j. Number of students served annually by grade level.
k. Number of students graduating high school with a career technical certificate or associates degree.

SUBJECT

Temporary/Proposed Rule, IDAPA 08.02.01 – Rules Governing Administration – Literacy Growth Targets

APPLICABLE STATUTES, RULE OR POLICY

Section 33-1616, Idaho Code

BACKGROUND/DISCUSSION

HB 526 (2016) amended Section 33-1616, Idaho Code requiring the Board set student trajectory growth to proficiency benchmarks and timelines for Kindergarten through grade 3. The proposed amendments add a new section to IDAPA 08.02.01 setting trajectory growth targets at the statewide level. Board staff in conjunction with feedback from the Idaho School Boards Association and the Idaho Association of School Administrators representatives and historical statewide performance levels on the statewide reading assessment are proposing the following growth targets by grade level.

Year 1 and 2:

Grade	**KG**	**1**	**2**	**3**
% Growth	1.0%	1.0%	1.0%	1.0%

Years 3 through 6:

Grade	**KG**	**1**	**2**	**3**
% Growth	1.8%	2.0%	1.6%	1.2%

The proposed growth targets, if met, would result in the following percent of students being at grade level in reading literacy by 2022 as follows:

Grade	**KG**	**1**	**2**	**3**
Percentage	88.4%	79.9%	76.7%	80.4%

The proposed rule would base these proficiency targets on the spring administration of the statewide reading assessment. The proposed targets would need to be re-evaluated each year and readjusted based on changes to the statewide reading assessment. Additionally, the rule would need to be adjusted for out years as we moved through the timeline.

It is also important to the note that these numbers are statewide growth targets and should not be applied to a single school or school district. Each school district will set their own benchmark or targets through their Continuous Improvement Plans. These targets will be based on their specific student populations and school district resources.

IMPACT

The approval of this proposed rule will bring the Board into compliance with new provisions contained in Section 33-1616, Idaho Code, and set statewide growth trajectory targets.

ATTACHMENTS

Attachment 1 – Proposed Rule changes to IDAPA 08.01.02 Page 3

STAFF COMMENTS AND RECOMMENDATIONS

Proposed rules have a 21 day comment period prior to becoming pending rules. Based on received comments and Board direction, changes may be made to proposed rules prior to entering the Pending stage. All pending rules will be brought back to the board for approval prior to submittal to the Department of Administration for publication in the Idaho Administrative Rules Bulletin as a pending rule. Pending rules become effective at the end of the legislative session in which they are submitted.

Temporary rules go into effect at the time of Board approval unless an alternative effective date is specified by Board action. To qualify as a temporary rule, the rule must meet one of three criteria: provides protection of public health, safety, or welfare; or is to come into compliance with deadlines in amendments to governing law or federal programs; or is conferring a benefit. This rule qualifies as temporary rules as it brings the state in compliance with HB 526 (2016) and Section 33-1616, Idaho Code.

Staff recommends approval.

BOARD ACTION

I move to approve the temporary and proposed rule IDAPA 08.02.01.802 Rules Governing Administration, Literacy Growth Targets as submitted in Attachment 1.

Moved by____________ Seconded by_____________ Carried Yes____ No____

IDAPA 08
TITLE 02
CHAPTER 01

08.02.01 - RULES GOVERNING ADMINISTRATION

802. LITERACY GROWTH TARGETS.

01. Statewide Trajectory Growth Targets. Statewide trajectory annual growth targets are based on aggregated student performance on the spring administration of the statewide reading assessments. Local growth targets are set by the LEA based on the LEA's available resources and student demographics. Statewide trajectory growth targets indicated the statewide goal for year over year increases in the percentage of students reading at grade level.

a. Year 1 and 2:
i. Kindergarten: one percent (1%).
ii. Grade one: one percent (1%).
iii. Grade two: one percent (1%).
iv. Grade three: one percent (1%).
b. Year 3, 4, 5 and 6:
i. Kindergarten: one point eight percent (1.8%).
ii. Grade one: two percent (2%).
iii. Grade two: one point six percent (1.6%).
iv. Grade three: one point two percent (1.2%).

02. Annual Review. The State Board of Education will review the statewide student proficiency levels and the statewide trajectory growth targets annually and adjust as appropriate based on statewide progress.

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SUBJECT

Temporary/Proposed Rule, IDAPA 08.02.01 – Rules Governing Administration – Statewide Average Class Size

APPLICABLE STATUTES, RULE OR POLICY

Section 33-1616, Idaho Code

BACKGROUND/DISCUSSION

HB 476 (2016) amended Section 33-1004, Idaho Code setting additional provisions for determining the statewide average class size that is used in calculations related to school district staff allowances. Prior to Fiscal Year 2016 (FY 2016), school districts were allowed to employ 9.5% fewer positions than what was funded based on their instruction and pupil service staff allowances. Beginning in FY 2016, this percentage is reduced by 1% for each year the school districts average class size was at least one (1) student greater than the statewide average class size.

Pursuant to Section 33-1004, Idaho Code the determination of this factor must be based on "multiple figures determined through analysis of like and similarly situated districts and use of the divisor breakdown established in Section 33-1002, Idaho Code." The divisor breakdown in Section 33-1002, Idaho Code establishes divisors for school districts based on grade levels and average daily attendance calculations, as well as divisors for alternative schools. The Board and Department of Education staff analyzed the groupings of school districts based on the various divisors applied to a single school district.

The proposed rule amendments would add a new section to IDAPA 08.02.01, Rules Governing Administration setting out the provisions for determining the statewide average class size based on the divisors specified in Section 33-1002, Idaho Code. The proposed breakdown would be as follows:

Group 1. Group 1 shall consist of school districts with an elementary divisor, pursuant to Section 33-1004, Idaho Code, of twenty (20) for grades 1 through 3 and twenty-three (23) for grades 4 through 6, and a secondary divisor of eighteen point five (18.5).

Group 2. Group 2 will consist of school districts with an elementary divisor, pursuant to Section 33-1004, Idaho Code, of twenty (20) for grades 1 through 3 and twenty-three (23) for grades 4 through 6, and a secondary divisor less than 18.5.

Group 3. Group 3 will consist of school districts with elementary divisors, pursuant to Section 33-1004, Idaho Code, of nineteen (19) or twenty (20) for grades 1 through 6, and a secondary divisor of less than eighteen point five (18.5).

Group 4. Group 4 will consist on school districts with elementary divisors, pursuant to Section 33-1004, Idaho Code, of less than nineteen (19) for grades 1 through 6, and a secondary divisor of less than eighteen point five (18.5).

The proposed groupings were shared with the Idaho School Boards Association and Idaho Association of School Administrators representatives and they were comfortable with the analysis and subsequent groupings.

IMPACT

Approval of the temporary and proposed rule would set out the method by which the statewide average class size for the use in support unit calculations is determined.

ATTACHMENTS

Attachment 1 – Proposed Rule changes to IDAPA 08.01.02 Page 3

STAFF COMMENTS AND RECOMMENDATIONS

Proposed rules have a 21 day comment period prior to becoming pending rules. Based on received comments and Board direction, changes may be made to proposed rules prior to entering the Pending stage. All pending rules will be brought back to the board for approval prior to submittal to the Department of Administration for publication in the Idaho Administrative Rules Bulletin as a pending rule. Pending rules become effective at the end of the legislative session in which they are submitted.

Temporary rules go into effect at the time of Board approval unless an alternative effective date is specified by Board action. To qualify as a temporary rule, the rule must meet one of three criteria: provides protection of public health, safety, or welfare; or is to come into compliance with deadlines in amendments to governing law or federal programs; or is conferring a benefit. This rule qualifies as temporary rules as it brings the state in compliance with HB 476 (2016) and Section 33-1004, Idaho Code.

Staff recommends approval.

BOARD ACTION

I move to approve the temporary and proposed rule IDAPA 08.02.01.803 Rules Governing Administration, Statewide Average Class Size as submitted in Attachment 1.

Moved by____________ Seconded by_____________ Carried Yes____ No____

IDAPA 08
TITLE 02
CHAPTER 01

08.02.01 - RULES GOVERNING ADMINISTRATION

803. STATEWIDE AVERAGE CLASS SIZE. For the purpose of determining the statewide average class sized used in school district staff allowance calculations, school districts shall be grouped as follows:

01. Group 1. Group 1 shall consist of school districts with an elementary divisor, pursuant to Section 33-1004, Idaho Code, of twenty (20) for grades 1 through 3 and twenty-three (23) for grades 4 through 6, and a secondary divisor of eighteen point five (18.5).

02. Group 2. Group 2 will consist of school districts with an elementary divisor, pursuant to Section 33-1004, Idaho Code, of twenty (20) for grades 1 through 3 and twenty-three (23) for grades 4 through 6, and a secondary divisor less than 18.5.

03. Group 3. Group 3 will consist of school districts with elementary divisors, pursuant to Section 33-1004, Idaho Code, of nineteen (19) or twenty (20) for grades 1 through 6, and a secondary divisor of less than eighteen point five (18.5).

04. Group 4. Group 4 will consist on school districts with an elementary divisors, pursuant to Section 33-1004, Idaho Code, of less than nineteen (19) for grades 1 through 6, and a secondary divisor of less than eighteen point five (18.5).

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SUBJECT

Proposed Rule IDAPA 08.02.02 – Rules Governing Uniformity – Teacher Certification Requirements

REFERENCE

August 2014	Board approved proposed rules incorporating a tiered certification structure into administrative rule as well as reorganization of the section and cleanup of out of date language.
November 2014	Board approved the pending rule incorporating the proposed changes. (The 2015 Legislature rejected the proposed rule)
May 2015	Board approved a temporary rule broadening the language regarding the alternate route to certification – content specialist.
August 2015	Board approved proposed rule amendments reorganizing the teacher certification section and adding language necessary due to the adoption of the career ladder.
November 2015	Board approved pending rule amendments reorganizing the teacher certification requirement (IDAPA 08.02.02)

APPLICABLE STATUTE, RULE, OR POLICY

Idaho Administrative code, IDAPA 08.02.02
Section 33-1201, Idaho Code

BACKGROUND/DISCUSSION

In late 2014, as part of the of the Career Ladder subcommittee work on tiered certification, it was discovered that there were a number of current practices regarding teacher certification that were not in alignment with Idaho statute or Idaho Administrative Code. Those practices that were not in alignment with Idaho statute were immediately corrected. In 2015 Board staff, working with the State Department of Education staff and additional education stakeholders, discussed those practices that had developed over time and the current certification requirements to identify which areas of the administrative rules should be changed and which practices needed to be changed to be compliant with Administrative Code. At the same time this group discussed issues around the state and national teacher shortage and ways that the certification requirements could be amended to maintain a high standards of professionalism while still providing flexibility to the school district. There was consensus from the group that there was not a desire to lower the minimum standards for certification and that there was a potential to do long term harm to the profession and students alike.

The group specifically discussed alternate and non-traditional routes that individuals could use to enter the teaching profession and the classroom. With the exception of small technical changes, it was felt that current requirements provide opportunities for individuals to enter the profession without following the traditional teacher preparation program route as well as pathways for individuals to add additional content area endorsements to their certificates. There was concern that in some areas our teacher mentoring programs were weak or under-resourced and it was felt that these programs were critical for assuring inexperienced teachers had the proper support in place to help them become effective teachers.

The majority of the proposed changes to IDAPA 08.02.02 address the issue of teachers assigned to classrooms outside of the grade ranges they are eligible to teach through their endorsements. Overall the group felt this change could result in increasing the pool of teachers that were available by removing the barrier of having to earn an additional certificate when in reality they were qualified to teach the subject areas and grade ranges if they met the endorsement requirements. This model would include the creation of additional grade ranges on some endorsements which would allow teachers to earn endorsements in those grade ranges they felt comfortable teaching in. At the same time, mechanisms would remain in place for teachers to earn additional endorsement for their certificates similar to the process for earning additional certificates.

The combination of the current standard elementary and secondary certificates address the issue of a teacher teaching outside of the grade range of their certificates without creating a disruption to individuals who currently hold certificates; this will ultimately result in the overall simplification of Idaho’s standard instructional certificates.

Additional amendments to IDAPA 08.02.02 include; amendments to the administrator evaluation submittal timeline to bring them in alignment with legislative changes made during the 2016 Legislature; amendments to the certificated staff evaluations regarding student achievement to bring them into alignment with the student achievement requirements that are part of the career ladder; the creation of middle school/grades endorsement grade ranges; and updates to the occupational specialist certificates. The middle school/grades endorsements address the issue of individuals who have already obtained endorsements for grades 6 through 9 that did not previously exist and is in alignment with the single instructional certificate model.

IMPACT

The proposed amendments would result in simplifying Idaho’s instructional certificates and resolve the issue of individuals teaching outside of their eligible grade ranges.

ATTACHMENTS

Attachment 1 – Proposed Rule changes to IDAPA 08.02.02 Page 5

STAFF COMMENTS AND RECOMMENDATIONS

The proposed changes to the standard certificates will result in a need for additional review of some of the endorsements to assure full alignment. It is recommended that this work be conducted by the Professional Standards Commission for consideration by the Board in 2017. Those endorsements that were identified as needing immediate edits to work with the new certification model are being brought forward at this time.

Amendments to IDAPA 08.02.02 that have been proposed by the Professional Standards Commission that are impacted by these changes have been incorporated into the proposed rule amendments being considered.

Proposed rules have a 21 day comment period prior to becoming pending rules. Based on received comments and Board direction, changes may be made to proposed rules prior to entering the Pending stage. All pending rules will be brought back to the board for approval prior to submittal to the Department of Administration for publication in the Idaho Administrative Rules Bulletin as a pending rule. Pending rules become effective at the end of the legislative session in which they are submitted.

Staff recommends approval.

BOARD ACTION

I move to approve changes to Proposed Rule IDAPA 08.02.02, as submitted in Attachment 1.

Moved by __________ Seconded by __________ Carried Yes _____ No _____

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IDAPA 08
TITLE 02
CHAPTER 02

08.02.02 - RULES GOVERNING UNIFORMITY

000. LEGAL AUTHORITY.
All rules in IDAPA 08.02.02, "Rules Governing Uniformity," are promulgated pursuant to the authority of the State Board of Education under Article IX, Section 2 of the Idaho Constitution and under Sections 33-105, 33-107, 33-116, and 33-1612, Idaho Code. Specific statutory references for particular rules are also noted as additional authority where appropriate. (7-1-02)

001. TITLE AND SCOPE.

01. Title. These rules shall be known as IDAPA 08.02.02, "Rules Governing Uniformity." (4-5-00)

02. Scope. Uniform standards and governance by the State Board of Education pertinent to Teacher Certification, School Facilities, Accreditation, Transportation, School Release Time, Driver's Education and Juvenile Detention Centers. (7-1-02)

002. WRITTEN INTERPRETATIONS.
In accordance with Section 67-5201(19)(b)(iv), Idaho Code, any written interpretations of the rules of this chapter are available at the Office of the State Board of Education located at 650 W. State St., Room 307, Boise, Idaho 83702. (7-1-02)

003. ADMINISTRATIVE APPEALS.
Unless otherwise provided for in these rules, administrative appeals are by written application to the State Board of Education pursuant to IDAPA 08.01.01, "Rules of the State Board of Education and Board of Regents of the University of Idaho – Administrative Procedures and Records," Section 050. (3-14-05)

004. INCORPORATION BY REFERENCE.
The State Board of Education adopts and incorporates by reference into its rules: (5-8-09)

01.Idaho Standards for the Initial Certification of Professional School Personnel as approved on August 13, 2015. Copies of this document can be found on the Office of the State Board of Education website at http://www.boardofed.idaho.gov. (3-25-16)

02. Standards for Idaho School Buses and Operations as approved on June 23, 2011. The Standards for Idaho School Buses and Operations are available at the Idaho State Department of Education, 650 W. State St., Boise Idaho, 83702 and can also be accessed electronically at http://www.sde.idaho.gov/site/transportation/library.htm. (3-29-12)

03. Operating Procedures for Idaho Public Driver Education Programs as approved on August 15, 2013. The Operating Procedures for Idaho Public Driver Education Programs are available at the Idaho State Department of Education, 650 W. State St., Boise, Idaho, 83702 and can also be accessed electronically at http://www.sde.idaho.gov/site/driver_edu/forms_curriculum.htm. (3-20-14)

005. OFFICE -- OFFICE HOURS -- MAILING AND STREET ADDRESS.
The principal place of business of the State Board of Education (SBOE) and State Department of Education (SDE) is in Boise, Idaho. Both offices are located at 650 W. State, Boise Idaho 83702. The SDE is on the 2nd Floor, the SBOE

is found in Room 307. Both offices are open from 8 a.m. to 5 p.m., except Saturday, Sunday, and legal holidays. The mailing address for the SBOE is PO Box 83720, Boise, ID 83720-0037. The mailing address for the SDE is PO Box 83720, Boise, ID 83720-0027. The SBOE phone number is (208) 334-2270 and the SDE phone number is (208) 332-6800. (3-25-16)

006. PUBLIC RECORDS ACT COMPLIANCE.
This rule has been promulgated in accordance with the Administrative Procedures Act, Title 67, Chapter 52, Idaho Code, and is a public record. (7-1-02)

007. DEFINITIONS.

01. Active Teacher. K-12 teacher with a valid Idaho certificate who is currently teaching in an Idaho K-12 classroom~~/~~ or school, either in-person or online. (3-16-04)

02. Alternative Routes. Routes to teacher certification designed for candidates who want to enter the teaching profession from non-education professions or the ~~para-educator~~paraprofessional profession, or for teachers lacking certification in a specific area defined as an emergency district need. (3-16-04)

03. Credential. The general term used to denote the document on which all of a person's educational certificates and endorsements are listed. The holder is entitled to provide educational services in any and/or all areas listed on the credential. (3-16-04)

04. Endorsement. Term used to refer to the content area or specific area of expertise in which a holder is granted permission to provide services. (3-16-04)

05. Idaho Student Achievement Standards. Standards of achievement for Idaho's K-12 students. See IDAPA 08.02.03, "Rules Governing Thoroughness." (3-16-04)

06. Individualized Professional Learning Plan. An individualized plan based on the Idaho framework for teacher as outlined in Section 120 of these rules to include interventions based on the individual's strengths and areas of needed growth. (3-25-16)

07. Institutional Recommendation. Signed form or written verification from an accredited institution with an approved teacher preparation program stating that an individual has completed the program, received a basic or higher rating in all twenty-two (22) components of the Idaho framework for teaching evaluation, has an individualized professional learning plan, has demonstrated measurable student achievement or growth and the ability to create student learning objectives, and is now being recommended for state certification. (3-25-16)

08. Local Education Agency (LEA). An Idaho public school district or charter school pursuant to Section 33-5203(7), Idaho Code. (3-25-16)

09. Orientation. School district/school process used to acquaint teachers new to district/school on its policies, procedures and processes. (3-16-04)

10. ~~Para-Educator~~Paraprofessional. ~~Aides and assistants employed by school districts to supplement instruction and provide additional assistance to students~~. A noncertificated individual who is employed by a school district or charter school to support educational programming. Paraprofessionals must work under the direct supervision of a properly certificated staff member for the areas they are providing support. Paraprofessionals cannot serve as the teacher of record and may not provide direct instruction to a student unless the paraprofessional is working under the direct supervision of a teacher. To qualify as a paraprofessional the individual must have completed at least two (2) years of study at an accredited postsecondary educational institution, obtained an associate degree or higher level degree; demonstrate through a state approved academic assessment knowledge of and the ability to assist in instructing or preparing students to be instructed as applicable to the academic areas they are providing support in. Individuals who do not meet these requirements will be considered classroom or instructional aides. (3-16-04)

11. Pedagogy. Teaching knowledge and skills. (3-16-04)

12. Student Learning Objective (SLO). A measurable, long-term academic growth target that a teacher sets at the beginning of the year for all student or for subgroups of students. SLOs demonstrate a teacher's impact on student learning within a given interval of instruction based upon baseline data gathered at the beginning of the course. (3-25-16)

13. Teacher Leader. A teacher who facilitates the design and implementation of sustained, intensive, and job-embedded professional learning based on identified student and teacher needs. (3-25-16)

008. -- 011. (RESERVED)

012. ACCREDITED INSTITUTION.

For purposes of teacher certification, an accredited school, college, university, or other teacher training institution is considered by the Idaho State Board of Education to be one that is accredited by a regional accrediting association recognized by the State Board of Education or an alternative model approved by the State Board of Education. (Sections 33-107; 33-114; 33-1203, Idaho Code) (4-1-97)

013. CERTIFICATION OF TEACHERS TRAINED IN FOREIGN INSTITUTIONS.

Considering credentials for teacher certification submitted by persons trained in the institutions of foreign countries will be initiated by a translation and evaluation of the applicant's credentials. (4-1-97)

01. Determination of Eligibility. Determination of eligibility for certification will be made by the State Department of Education as the agent of the State Board of Education. Appeals may be made to the Professional Standards Commission, (PSC). (Section 33-1209, Idaho Code) (3-16-04)

02. Other Procedures. All other procedures in effect at the time must be followed at the time of application. (4-1-97)

014. CERTIFICATES ISSUED TO APPLICANTS FROM REGIONALLY ACCREDITED INSTITUTIONS.

01. The Department of Education. The department of education is authorized to issue Idaho Certificates to applicants from regionally accredited institutions meeting requirements for certification or equivalent (i.e., those based on a ~~bachelor's~~baccalaureate degree) in other states when they substantially meet the requirements for the Idaho Certificate. (Sections 33-1203; 33-2203 Idaho Code) (3-16-04)

02. The ~~State~~ Division of Career Technical Education. The ~~state~~ division of career technical education is authorized to determine whether applicants meet the requirements for instructing or administering career technical programs at the secondary and postsecondary levels. (Section 33-2203, Idaho Code) (3-16-04)

015. IDAHO EDUCATOR CREDENTIAL.

The State Board of Education authorizes the State Department of Education to issue certificates and endorsements to those individuals meeting the specific requirements for each area provided herein. (3-25-16)

01. ~~Standard Elementary~~Standard Instructional Certificate. A ~~Standard Elementary~~Standard Instructional Certificate makes an individual eligible to teach ~~grades Kindergarten (K) through eight (8)~~all grades, subject to the grade ranges and subject areas of the valid endorsement(s) attached to the certificate~~,~~. A standard instructional certificate ~~and~~ may be issued to any person who has a ~~bachelor's~~baccalaureate degree from an accredited college or university and who meets the following requirements: The Standard Instructional Certificate is valid for five (5) years. Six (6) semester credit hours are required every five (5) years in order to renew the certificate. ~~(3-25-16)~~

a. ~~Completion of the general education requirements at an accredited college or university is required. (3-25-16)~~

~~**b.** Meets the following p~~Professional education requirements: ~~(3-25-16)~~

i. Earned ~~A~~a minimum of twenty ~~four~~ (2~~4~~0) semester credit hours, or thirty ~~six~~ (3~~6~~0) quarter credit hours, in the philosophical, psychological, methodological foundations, instructional technology, and in the professional subject matter ~~of elementary education~~, which shall include at least ~~six~~ three (~~6~~3) semester credit hours, or ~~nine~~ four (~~9~~4) quarter credit hours, in ~~developmental~~ reading and its application to the content area; ~~.~~ ~~(3-25-16)~~

~~ii.~~ The required minimum credit hours must include at least six (6) semester credit hours, or nine (9) quarter credit hours, of ~~either~~ student teaching in ~~grades kindergarten through eight (K-8), or two (2) years of satisfactory experience as a teacher in grades kindergarten through eight (K-8).~~ the grade range and subject areas as applicable to the endorsement; and (3-25-16)

~~c~~b. Completed an approved teacher preparation program and have ~~A~~an institutional recommendation from an accredited college or university specifying the grade ranges and subjects for which they are eligible to receive an endorsement in; or

c. ~~v~~V~~erification of two (2) years of teaching experience in grades Kindergarten (K) through eight~~ (~~8~~).

Individuals seeking endorsement in a secondary grade range must complete preparation in at least two (2) fields of secondary teaching. One of the teaching fields must consist of at least thirty (30) semester credit hours, or forty-five (45) quarter credit hours and a second field of teaching consisting of at least twenty (20) semester credit hours, or thirty (30) quarter credit hours. Preparation of not less than forty-five (45) semester credit hours, or sixty-seven (67) quarter credit hours, in a single subject area may be used in lieu of the two (2) teaching field requirements; and

~~**d.** All individuals, who begin an Idaho approved preparation program after July 1, 2013, seeking a Standard Elementary Certificate shall complete the requirements for a subject area endorsement as outlined under requirements for a Standard Secondary Certificate. An endorsement allowing teaching of that subject through grade eight (8) or a K-12 endorsement shall be added to the Standard Elementary Certificate. (3-25-16)~~

~~e~~d. Proficiency in areas noted above is measured by completion of the credit hour requirements provided herein. Additionally, each candidate must meet or exceed the state qualifying score on the state board approved ~~elementary or secondary~~ content area and pedagogy assessments. ~~(3-25-16)~~

~~**02. Standard Secondary Certificate**. A Standard Secondary Certificate makes an individual eligible to teach in grades six (6) through twelve (12). A Secondary Certificate may be issued to any person with a bachelor's degree from an accredited college or university and who meets the following minimum requirements: (3-25-16)~~

~~**a.** Completion of the general education requirements at an accredited college or university is required. (3-25-16)~~

~~**b.** Professional Education Requirements: (3-25-16)~~

~~i. A minimum of twenty (20) semester credit hours, or thirty (30) quarter credit hours, in the philosophical, psychological, and methodological foundations, instructional technology, and in the professional subject matter of secondary education, which must include at least three (3) semester credit hours, or four (4) quarter credit hours, of reading in the content area. (3-25-16)~~

~~ii. The required twenty (20) semester credit hours, or thirty (30) quarter credit hours, must also include at least six (6) semester credit hours, or nine (9) quarter credit hours, of secondary student teaching or two (2) years of satisfactory experience as a teacher in grades six (6) through twelve (12). (3-25-16)~~

~~**c.** Preparation in at least two (2) fields of secondary teaching: a first teaching field of at least thirty (30) semester credit hours, or forty-five (45) quarter credit hours, and a second teaching field of at least twenty (20) semester credit hours, or thirty (30) quarter credit hours. Preparation of not less than forty-five (45) semester credit hours, or sixty-seven (67) quarter credit hours, in a single subject area may be used in lieu of the first teaching field or second teaching field requirements. (3-25-16)~~

~~**d.** An institutional recommendation from an accredited college or university or verification of two (2) years of teaching experience in grades six (6) through twelve (12). (3-25-16)~~

~~**e.** Proficiency in areas noted above is measured by completion of the credit hour requirements provided herein. Additionally, each candidate must have a qualifying score on an approved content area assessment in any area(s) for which the certificate or endorsement(s) will be applied. (3-25-16)~~

~~**03. Blended Early Childhood Education / Early Childhood Special Education Certificate**. A Blended Early Childhood Education / Early Childhood Special Education Certificate makes an individual eligible to teach in any early childhood educational setting for youth from birth to grade three (3), including those who are at-risk or have developmental delays. This certificate may be issued to any person with a baccalaureate degree from an accredited college or university and who meets the following minimum requirements: (3-25-16)~~

~~**a.** Completion of the general education requirements at an accredited college or university is required. (3-25-16)~~

~~**b.** Meets the following professional education requirements: (3-25-16)~~

~~i. A minimum of thirty (30) semester credit hours, or forty-five (45) quarter credit hours, in the philosophical, psychological, and methodological foundations, in instructional technology, and in the professional subject matter of early childhood and early childhood-special education. The professional subject matter of early childhood and early childhood-special education shall include course work specific to the child from birth through grade three (3)in the areas of child development and learning; curriculum development and implementation; family and community relationships; assessment and evaluation; professionalism; and, application of technologies. (3-25-16)~~

~~ii. The required thirty (30) semester credit hours, or forty-five (45) quarter credit hours, shall include not less than six (6) semester credit hours, or nine (9) quarter credit hours, of early childhood student teaching and three (3) semester credit hours, or four (4) quarter credit hours, of developmental reading. (3-25-16)~~

~~**c.** An institutional recommendation from an accredited college or university. (3-25-16)~~

~~**d.** Proficiency in areas noted above is measured by completion of the credit hour requirements provided herein. Additionally, each candidate shall meet or exceed the state qualifying score on approved early childhood assessments. (3-25-16)~~

~~**04. Exceptional Child Certificate**. Holders of this certificate are authorized to work with children who have been identified as having an educational impairment. (3-25-16)~~

~~**a.** Completion of the general education requirements at an accredited college or university is required and six (6) or more semester credit hours, or nine (9) or more quarter credit hours of student teaching in a special education setting. (3-25-16)~~

~~**b.** Exceptional Child Generalist Endorsement (K-12). The Exceptional Child Generalist K-12 endorsement is non-categorical and allows one to teach in any K-12 special education setting. This endorsement is valid for five (5) years. Six (6) credit hours are required every five (5) years for renewal. Regardless of prior special education experience, all initial applicants must provide an institutional recommendation that an approved special~~

~~education program has been completed, with field work to include student teaching in an elementary or secondary special education setting. To be eligible for an Exceptional Child Certificate with a Generalist K-12 endorsement, a candidate must have satisfied the following requirements: (3-25-16)~~

~~i. Completion of a baccalaureate degree from an accredited college or university; (3-25-16)~~

~~ii. Completion, in an Idaho college or university, of a program in elementary, secondary, or special education currently approved by the Idaho State Board of Education; or completion, in an out-of-state college or university, of a program in elementary, secondary, or special education currently approved by the state educational agency of the state in which the program was completed; (3-25-16)~~

~~iii. Completion of thirty (30) semester credit hours in special education, or closely related areas, as part of an approved special education program; and (3-25-16)~~

~~iv. Each candidate must have a qualifying score on an approved core content assessment and a second assessment related to the specific endorsement requested. (3-25-16)~~

~~**c.** Early Childhood Special Education Endorsement (Pre-K-3). The Early Childhood Special Education (Pre-K-3) endorsement is non-categorical and allows one to teach in any Pre-K-3 special education setting. This endorsement may only be added to the Standard Exceptional Child Certificate in conjunction with the Generalist K-12 endorsement and is valid for five (5) years. Six (6) credit hours are required every five (5) years for renewal. To be eligible for an Exceptional Child Certificate with an Early Childhood Special Education (Pre-K-3) endorsement, a candidate must have satisfied the following requirements: (3-25-16)~~

~~i. Completion of a program of a minimum of twenty (20) semester credit hours in the area of Early Childhood Education to include course work in each of the following areas: child development and behavior with emphasis in cognitive-language, physical, social and emotional areas, birth through age eight (8); curriculum and program development for young children ages three to eight (3-8); methodology: planning, implementing and evaluating environments and materials for young children ages three to eight (3-8); guiding young children's behavior: observing, assessing and individualizing ages three to eight (3-8); identifying and working with atypical young children ages three to eight (3-8) parent-teacher relations; and, field work to include an internship and student teaching at the Pre-K - 3 grades. (3-25-16)~~

~~**d.** Deaf/Hard of Hearing Endorsement (K-12). Completion of a minimum of thirty-three (33) semester credit hours in the area of deaf/hard of hearing with an emphasis on instruction for students who use sign language or completion of a minimum thirty-three (33) semester credit hours in the area of deaf/hard of hearing with an emphasis on instruction for students who use listening and spoken language. An institutional recommendation specific to this endorsement is required. To be eligible for an Exceptional Child Certificate with a Deaf/Hard of Hearing endorsement, a candidate must have satisfied the following requirements: (3-25-16)~~

~~i. Completion of a baccalaureate degree from an accredited college or university; (3-25-16)~~

~~ii. Completion of a program from an Idaho college or university in elementary, secondary, or special education currently approved by the Idaho State Board of Education; or (3-25-16)~~

~~iii. Completion of a program from an out-of-state college or university in elementary, secondary, or special education currently approved by the state educational agency of the state in which the program was completed; and (3-25-16)~~

~~iv. Completion of a program of a minimum of thirty-three (33) semester credit hours in the area of Deaf/Hard of Hearing and must receive an institutional recommendation specific to this endorsement from an accredited college or university. (3-25-16)~~

~~**e.** Visual Impairment Endorsement (K-12). Completion of a program of a minimum of thirty (30)~~

~~semester credit hours in the area of visual impairment. An institutional recommendation specific to this endorsement is required. To be eligible for an Exceptional Child Certificate with a Visually Impaired endorsement, a candidate must have satisfied the following requirements: (3-25-16)~~

~~i. Completion of a baccalaureate degree from an accredited college or university; (3-25-16)~~

~~ii. Completion in an Idaho college or university of a program in elementary, secondary, or special education currently approved by the Idaho State Board of Education, or completion in an out-of-state college or university of a program in elementary, secondary, or special education currently approved by the state educational agency of the state in which the program was completed; (3-25-16)~~

~~iii. Completion of a program of a minimum of thirty (30) semester credit hours in the area of Visual Impairment and must receive an institutional recommendation specific to this endorsement from an accredited college or university; and (3-25-16)~~

~~iv. Each candidate must have a qualifying score on an approved core content assessment and a second assessment related to the specific endorsement requested. (3-25-16)~~

0~~5~~2. Pupil Personnel Services Certificate. Persons who serve as school counselors, school psychologists, speech-language pathologists, school social workers, school nurses and school audiologists are required to hold the Pupil Personnel Services Certificate, with the respective endorsement(s) for which they qualify. (3-25-16)

a. Counselor Endorsement (K-12). To be eligible for a Pupil Personnel Services Certificate endorsed Counselor K-12, a candidate must have satisfied the following requirements. The Pupil Personnel Services Certificate with a Counselor endorsement is valid for five (5) years. Six (6) semester credit hours are required every five (5) years in order to renew the endorsement. (3-25-16)

i. Hold a master's degree and provide verification of completion of an approved program of graduate study in school counseling from a college or university approved by the Idaho State Board of Education or the state educational agency of the state in which the program was completed. The program must include successful completion of seven hundred (700) clock hours of supervised field experience, seventy-five percent (75%) of which must be in a K-12 school setting. This K-12 experience must be in each of the following levels: elementary, middle/junior high, and high school. Previous school counseling experience may be considered to help offset the field experience clock hour requirement; and (3-25-16)

ii. An institutional recommendation is required for a Counselor K-12 Endorsement. (3-25-16)

b. School Psychologist Endorsement. This endorsement is valid for five (5) years. In order to renew the endorsement, six (6) professional development credits are required every five (5) years. The renewal credit requirement may be waived if the applicant holds a current valid National Certification for School Psychologists (NCSP) offered through the National Association of School Psychologists (NASP). To be eligible for initial endorsement, a candidate must complete a minimum of sixty (60) graduate semester credit hours which must be accomplished through one (1) of the following options: (3-25-16)

i. Completion of an approved thirty (30) semester credit hour, or forty-five (45) quarter credit hours, master's degree in education or psychology and completion of an approved thirty (30) semester credit hour, or forty-five (45) quarter credit hour, School Psychology Specialist Degree program, and completion of a minimum of twelve hundred (1,200) clock-hour internship within a school district under the supervision of the training institution and direct supervision of a certificated school psychologist; (3-25-16)

ii. Completion of an approved sixty (60) semester credit hour, or ninety (90) quarter credit hour, master's degree program in School Psychology, and completion of a minimum of twelve hundred (1,200) clock-hour internship within a school district under the supervision of the training institution and direct supervision of a certificated school psychologist; (3-25-16)

iii. Completion of an approved sixty (60) semester credit hour, or ninety (90) quarter credit hour, School Psychology Specialist degree program which did not require a master's degree as a prerequisite, with laboratory experience in a classroom, which may include professional teaching experience, student teaching or special education practicum, and completion of a minimum twelve hundred (1,200) clock-hour internship within a school district under the supervision of the training institution and direct supervision of a certificated school psychologist; and (3-25-16)

iv. Earn a current and valid National Certification for School Psychologists (NCSP) issued by the National Association of School Psychologists (NASP). (3-25-16)

c. School Nurse Endorsement. This endorsement is valid for five (5) years. Six (6) credits are required every five (5) years in order to renew the endorsement. Initial endorsement may be accomplished through completion of either requirements in Subsections 015.04.c.i. or 015.04.c.ii. in addition to the requirement of Subsection 015.04.c.iii. (3-25-16)

i. The candidate must possess a valid nursing (RN) license issued by the Idaho State Board of Nursing, and a ~~bachelor's~~baccalaureate degree in nursing, education, or a health-related field from an accredited institution. (3-25-16)

ii. The candidate must possess a valid professional nursing (RN) license issued by the Idaho State Board of Nursing and have completed nine (9) semester credit hours from a university or college in at least three (3) of the following areas: (3-25-16)

(1) Health program management; (3-25-16)

(2) Child and adolescent health issues; (3-25-16)

(3) Counseling, psychology, or social work; or (3-25-16)

(4) Methods of instruction. (3-25-16)

iii. Additionally, each candidate must have two (2) years' of full-time (or part-time equivalent) school nursing, community health nursing, or any area of pediatric, adolescent, or family nursing experience. (3-25-16)

d. Interim Endorsement - School Nurse. This ~~certificate~~ endorsement will be granted for those who do not meet the educational and/or experience requirements but who hold a valid professional nursing (RN) license in Idaho. An Interim ~~Certificate Endorsement -~~ School Nurse Endorsement - will be issued for three (3) years while the applicant is meeting the educational requirements, and it is not renewable. (3-25-16)

e. Speech-Language Pathologist Endorsement. This endorsement is valid for five (5) years. Six (6) credits are required every five (5) years in order to renew the endorsement. The initial endorsement will be issued to candidates who possess a master's degree from an accredited college or university in a speech/language pathology program approved by the State Board of Education, and who receive an institutional recommendation from an accredited college or university. (3-25-16)

f. Audiology Endorsement. This endorsement is valid for five (5) years. Six (6) credits are required every five (5) years in order to renew the endorsement. The initial endorsement will be issued to candidates who possess a master's degree from an accredited college or university in an audiology program approved by the State Board of Education, and who receive an institutional recommendation from an accredited college or university. (3-25-16)

g. School Social Worker Endorsement. This endorsement is valid for five (5) years. Six (6) credit hours are required every five (5) years in order to renew the endorsement. Initial endorsement may be accomplished through possession of a social work certificate issued by the Idaho Bureau of Occupational Licenses, an institutional recommendation, and completion of one (1) of the following options: (3-25-16)

i. A master's degree in social work from a postsecondary institution accredited by an organization recognized by the State Board of Education. The program must be currently approved by the state educational agency of the state in which the program was completed; and (3-25-16)

ii. A master's degree in guidance and counseling, sociology, or psychology plus thirty (30) semester credit hours of graduate work in social work education, including course work in all the following areas: understanding the individual; casework method; field placement; social welfare programs and community resources; and research methods. (3-25-16)

h. Interim Endorsement-Speech Language Pathologist. This certificate will be granted for those who do not meet the educational requirements but who hold a ~~bachelor's~~baccalaureate degree in speech language pathology and are pursuing a master's degree in order to obtain the pupil personnel services certificate endorsed in speech language pathology. An interim certificate will be issued for three (3) years while the applicant is meeting the educational requirements, and it is not renewable. (3-25-16)

0~~6~~3. **Administrator Certificate**. Every person who serves as a superintendent, a secondary school principal, or principal of an elementary school with eight (8) or more teachers (including the principal), or is assigned administrative duties over and above those commonly assigned to teachers, is required to hold an Administrator Certificate. The certificate may be endorsed for service as a school principal, a superintendent, or a director of special education and related services. Assistant superintendents are required to hold the Superintendent endorsement. Assistant principals or vice-principals are required to hold the Principal endorsement. Applicants for the Director of Special Education and Related Services endorsement will hold that endorsement on an Administrator Certificate. Proof of proficiency in evaluating teacher performance shall be required of all Administrator Certificate holders. Proof of proficiency in evaluating performance shall be demonstrated by passing a proficiency assessment approved by the State Department of Education as an initial certification requirement. Possession of an Administrator Certificate does not entitle the holder to serve as a teacher at a grade level for which the educator is not qualified or certificated. All administrator certificates require candidates to meet the following competencies of the Idaho Foundation Standards for School Administrators: School Climate, Collaborative Leadership, and Instructional Leadership. The Administrator Certificate is valid for five (5) years. Six (6) semester credit hours are required every five (5) years in order to renew the certificate. (3-25-16)

a. School Principal Endorsement (Pre-K-12). To be eligible for an Administrator Certificate endorsed for School Principal Pre-K-12, a candidate must have satisfied the following requirements: (3-25-16)

i. Hold a master's degree from an accredited college or university. (3-25-16)

ii. Have four (4) years of full-time certificated experience working with students, Pre-K-12, while under contract in an accredited school setting. (3-25-16)

iii. Have completed an administrative internship in a state-approved program, or have one (1) year of experience as an administrator in grades Pre-K-12. (3-25-16)

iv. Provide verification of completion of a state-approved program of at least thirty (30) semester credit hours, forty-five (45) quarter credit hours, of graduate study in school administration for the preparation of school principals at an accredited college or university. This program shall include the competencies of the Idaho Foundation Standards for School Administrators: School Climate, Collaborative Leadership, and Instructional Leadership. (3-25-16)

v. An institutional recommendation is required for a School Principal Pre-K-12 Endorsement. (3-25-16)

b. Superintendent Endorsement. To be eligible for an Administrator Certificate with a Superintendent endorsement, a candidate must have satisfied the following requirements: (3-25-16)

i. Hold an education specialist or doctorate degree or complete a comparable post-master's sixth year program at an accredited college or university. (3-25-16)

ii. Have four (4) years of full-time certificated/licensed experience working with Pre-K-12 students while under contract in an accredited school setting. (3-25-16)

iii. Have completed an administrative internship in a state-approved program for the superintendent endorsement or have one (1) year of out-of-state experience as an assistant superintendent or superintendent in grades Pre-K-12. (3-25-16)

iv. Provide verification of completion of an approved program of at least thirty (30) semester credit hours, or forty-five (45) quarter credit hours, of post-master's degree graduate study for the preparation of school superintendents at an accredited college or university. This program in school administration and interdisciplinary supporting areas shall include the competencies in Superintendent Leadership, in additional to the competencies in the Idaho Foundation Standards for School Administrators: School Climate, Collaborative Leadership, and Instructional Leadership. (3-25-16)

v. An institutional recommendation is required for a School Superintendent Endorsement. (3-25-16)

c. Director of Special Education and Related Services Endorsement (Pre-K-12). To be eligible for an Administrator Certificate endorsed for Director of Special Education and Related Services Pre-K-12, a candidate must have satisfied all of the following requirements: (3-25-16)

i. Hold a master's degree from an accredited college or university; (3-25-16)

ii. Have four (4) years of full-time certificated/licensed experience working with students Pre-K-12, while under contract in a school setting; (3-25-16)

iii. Obtain college or university verification of demonstrated the competencies of the Idaho Foundation Standards for School Administrators: School Climate, Collaborative Leadership, and Instructional Leadership; (3-25-16)

iv. Obtain college or university verification of demonstrated competencies in the following areas, in addition to the competencies in the Idaho Foundation Standards for School Administrators: Concepts of Least Restrictive Environment; Post-School Outcomes and Services for Students with Disabilities Ages Three (3) to Twenty-one (21); Collaboration Skills for General Education Intervention; Instructional and Behavioral Strategies; Individual Education Programs (IEPs); Assistive and Adaptive Technology; Community-Based Instruction and Experiences; Data Analysis for Instructional Needs and Professional Training; Strategies to Increase Program Accessibility; Federal and State Laws and Regulations and School District Policies; Resource Advocacy; and Technology Skills for Referral Processes, and Record Keeping; (3-25-16)

v. Have completed an administrative internship/practicum in the area of administration of special education and related services; and (3-25-16)

vi. An institutional recommendation is required for Director of Special Education and Related Services Pre-K-12 Endorsement. (3-25-16)

0~~7~~4. **Certification Standards For Career Technical Educators**. Teachers of career technical ~~classes~~ courses or programs in secondary or postsecondary schools must hold an endorsement in an appropriate occupational discipline. This endorsement may be held on a ~~secondary teaching~~Standard Instructional ~~c~~Certificate or on an

Occupational Specialist Certificate. For postsecondary instructors and administrators, certification fees are set by the State Board for Career technical Education, and application processes are managed by the Division of Career Technical Education. (3-25-16)

0~~8~~5. Degree Based Career Technical Certification. (3-25-16)

a. Individuals graduating from an approved occupational teacher preparation degree program qualify to teach in the following five (5) disciplines: ~~Agricultural Science and Technology~~Agriculture and Natural Resources; Business Technology Education; Family and Consumer Sciences; Marketing Technology Education; and Engineering Technology Education. Occupational teacher preparation course work must meet the Idaho Standards for the Initial Certification of Professional School Personnel. The occupational teacher education program must provide appropriate content to constitute a major in the identified field. Student teaching shall be in an approved program and include experiences in the major field. Applicants shall have accumulated four-thousand (4,000) clock hours of related work experience or shall have completed a~~n~~ Division of Career Technical Education approved practicum in their respective field of specialization. (3-25-16)

b. The Career Technical Administrator certificate is required for an individual serving as an administrator, director, manager or coordinator of career technical education at the state, secondary or postsecondary level. Individuals must meet the following prerequisites to qualify for the Career technical Administrator Certificate. Equivalence in each area will be determined on an individual basis by the ~~State~~ Division of Career Technical Education. (3-25-16)

i. Qualify for or hold an Occupational Specialist certificate or hold an occupational endorsement on a secondary teaching certificate; (3-25-16)

ii. Provide evidence of a minimum of ~~three~~ four (~~3~~4) years' teaching, three (3) of which must be in an ~~occupational~~ career technical discipline; (3-25-16)

iii. Hold a master's degree; and (3-25-16)

iv. Complete at least fifteen (15) semester credits of administrative course work. Applicants must have completed: financial aspects of career technical education; administration of personnel; and legal aspects of career technical education, and statewide framework for teacher evaluations that includes a laboratory component. Additional course work can be selected from any of the following areas: administration and supervision of occupational programs; instructional supervision; administration internship; curriculum development; curriculum evaluation; research in curriculum; school community relations; communication; teaching the adult learner; coordination of work-based learning programs; and/or measurement and evaluation. (3-25-16)

v. To renew the Career Technical Administrator Certificate, individuals are required to complete six (6) semester hours of related course work or meet renewal requirements for career technical ~~teachers~~ instructional staff. (3-25-16)

c. Work-Based Learning Coordinator Endorsement. Educators assigned to coordinate approved work-based experiences must hold the Work-Based Learning Coordinator endorsement. To be eligible, applicants must hold an occupational endorsement on the ~~Standard Secondary~~Standard Instructional Certificate or qualify for an Occupational Specialist Certificate, plus complete course work in coordination of work-based learning programs. (3-25-16)

d. Career Counselor Endorsement. The endorsement for a Career Counselor may be issued to applicants who hold a current Pupil Personnel Services Certificate endorsed Counselor K-12 and who have satisfied the following professional technical requirement: Career Pathways and Professional Technical Guidance; Principles/Foundations of Career technical Education; and Theories of Occupational Choice. (3-25-16)

0~~9~~6. Occupational Specialist Certificate. The occupational specialist certificates ~~is~~are ~~an~~ industry based career technical certifications issued in lieu of a degree based career technical certificate. Certificate holders must meet the following eligibility requirements~~.~~: ~~Persons who need to hold the Occupational Specialist Certificate include: secondary educators assigned to Health Professions Education and Technical Sciences; those in specialized occupational areas where specific degree-granting professional technical teacher education programs do not exist; and postsecondary career technical educators who teach courses with nine (9) - to twelve (12) students per class.~~ (3-25-16)

a. ~~Applicants must: b~~Be eighteen (18) years of age; document full-time, successful, recent, gainful employment in the area for which certification is requested; possess either a high school diploma or General Educational Development (GED) certificate; meet provisions of Idaho Code; and, verify technical skills through work experience, certification or testing as listed below. When applicable, requirements of occupationally related state agencies must also be met. Since educational levels and work experiences vary, applicants may be determined highly qualified under any one (1) of the following three (3) options: (3-25-16)

i. Have eight (8) years, or sixteen-thousand (16,000) hours of~~ full-time,~~ ~~successful,~~ recent, gainful employment in the occupation for which certification is requested. Up to forty-eight (48) months credit or up to eight thousand (8,000) hours can be counted toward the eight (8) years on a month-to-month basis for journeyman training ~~and/~~or completed postsecondary training in ~~successfully completed as a full-time student in an approved/approvable, postsecondary,~~ a career technical education program; or (3-25-16)

ii. Have a ~~bachelor's~~baccalaureate degree in the specific occupation or related area, plus three (3) years or six-thousand (6,000) hours of ~~full-time, successful,~~ recent, gainful employment in the occupation; ~~and~~or (3-25-16)

iii. Meet one (1) of the following: (3-25-16)

(1) ~~Have at least~~Be a journeyman ~~level plus~~ with two (2) years of recent, full-time, gainful, related work experience~~. A person who has~~ or have completed a formal apprenticeship program in the occupation or related area for which certification is requested. The apprenticeship must be under the direction of an employer and the Bureau of Apprenticeship and Training or an approved ~~S~~state ~~A~~apprenticeship ~~A~~agency; (3-25-16)

(2) Pass an approved state or national ~~certification/~~certification examination plus three (3) years of recent, ~~full-time,~~ gainful, related work experience (length and type of work experience ~~in emergency services and health professions~~ will be determined on an individual basis); or (3-25-16)

(3) Pass approved industry related certification for skill level requirements (vendor and industry specific) plus three (3) years of recent, ~~full-time,~~ gainful, related work experience (length and type of work experience ~~in emergency services and health professions~~ will be determined on an individual basis). If no competency test exists, a written recommendation from a representative occupational advisory council/committee and recorded in its minutes is required to verify occupational competence. (3-25-16)

b. Limited Occupational Specialist Certificate. This certificate is issued to individuals who are new to teaching ~~trades and health occupations professions~~ in public schools. The certificate is valid for three (3) years and is non-renewable: (3-25-16)

i. Within the first eighteen (18) months, the holder must complete the pre-service workshop sponsored by the ~~State~~ Division of Career technical Education and an approved course in professional technical methods and student assessment; (3-25-16)

ii. Complete a new-teacher induction workshop at the state or district level; (3-25-16)

~~iii. File a professional development plan with the State Division of Career technical Education; and (3-25-16)~~

iv. Within the three (3) year period of the Limited Occupational Specialist Certificate, the instructor must satisfactorily ~~complete course work which includes~~ demonstrate competencies in ~~four (4) of the following:~~ Principles/Foundations of Occupational Education~~;~~ and Methods of Teaching Occupational Education. Additionally, the instructor must satisfactorily demonstrate competencies in two (2) of the following areas: Career Pathways and Guidance; Analysis, Integration, and Curriculum Development; and Measurement and Evaluation~~; and Methods of Teaching Occupational Education~~. (3-25-16)

c. Standard Occupational Specialist Certificate. This certificate is issued to individuals who have:

i. Completed the pre-service workshop sponsored by the Division of Career Technical Education and an approved course in career technical methods and student assessment; and ( )

ii. Completed a new-teacher induction workshop at the state or district level; and ( )

iii. Can satisfactorily demonstrate competencies in Principles/Foundations of Occupational Education and Methods of Teaching Occupational Education; and

iv. Can demonstrate competencies in two (2) of the following areas: Career Pathways and Guidance; Analysis, Integration, and Curriculum Development; and Measurement and Evaluation; and ( )

v. ~~have completed course work equivalent to that required of the Limited Occupational Specialist Certificate.~~ The Standard Occupational Specialist ~~c~~Certificate ~~must be renewed every~~ is valid for five (5) years~~, which shall include completion of six (6) semester credit hours of approved course work or~~ and must be renewed pursuant to section 060. Credit equivalencies will be based on verification of ~~two hundred-forty~~one hundred twenty (~~240~~120) hours of approved related work experience or ~~ninety~~ forty-five (~~90~~45) hours of ~~attendance~~ participation at approved technical conferences, institutes, or workshops or any equivalent combination thereof, and file of a professional development plan for the next certification period. Work experience may be prorated at the rate of forty (40) hours per credit. Technical conference, institutes, or workshop participation may be prorated at the rate of fifteen (15) hours per credit. (3-25-16)

d. Advanced Occupational Specialist Certificate. This certificate is issued to individuals who ~~meet all the requirements outlined below~~have: (3-25-16)

i. Meet the requirements for the Standard Occupational Specialist Certificate; and (3-25-16)

ii. Can ~~P~~provide evidence of completion of a teacher training degree program or eighteen (18) semester credits of approved education related course work, such as educational methodology in the content area, in addition to the twelve (12) semester credits required for the Standard Occupational Specialist Certificate (a total of thirty (30) semester credits); and (3-25-16)

iii. File a new professional development plan for the next certification period; and (3-25-16)

iv. ~~This~~ The Advanced Occupational ~~c~~Certificate ~~must be renewed every~~is valid for five (5) years and must be renewed pursuant to Section 060.~~, which shall include completion of six (6) semester credit hours of approved course work or submit~~At least three (3) educationally focused semester credits must be taken for university or college credit. ~~v~~Verification will be based on an official transcript. In addition to the minimum of three (3) semester credits, in-service activities or related work experience may be used. ~~of two hundred-forty~~Credit equivalencies will be based on verification of one hundred twenty (~~240~~120) hours of approved related work experience or ~~ninety~~ forty five (~~90~~45) hours of ~~attendance~~ participation at approved technical conferences, institutes and workshops or any equivalent combination thereof, and file a new professional development plan for the next certification period. Work experience may be prorated at the rate of forty (40) hours per credit. Technical conference, institutes, or workshop participation may be prorated at the rate of fifteen (15) hours per credit. ~~(3-25-16)~~

~~10~~07. **Postsecondary Specialist**. A Postsecondary Specialist certificate will be granted to a current academic faculty member whose primary employment is with any accredited Idaho postsecondary institution. To be eligible to teach in the public schools under this postsecondary specialist certificate, the candidate must supply a recommendation from the employing institution (faculty's college dean). The primary use of this state-issued certificate will be for distance education, virtual classroom programs, and for public and postsecondary partnerships. (3-25-16)

a. Renewal. This certificate is good for five (5) years and is renewable. To renew the certificate, the renewal application must be accompanied with a new written recommendation from the postsecondary institution (faculty's college dean level or higher). (3-25-16)

b. Fees. The fee is the same as currently in effect for an initial or renewal certificate as established in Section 066 of these rules. (3-25-16)

c. The candidate must meet the following qualifications: (3-25-16)

i. Hold a master's degree or higher in the content area being taught; (3-25-16)

ii. Be currently employed by the post~~-~~secondary institution in the content area to be taught; and (3-25-16)

iii. Complete and pass a criminal history background check as required according to Section 33-130, Idaho Code. (3-25-16)

~~11~~08. **American Indian Language**. Each Indian tribe shall provide to the State Department of Education the names of those highly and uniquely qualified individuals who have been designated to teach the tribe's native language in accordance with Section 33-1280, Idaho Code. Individuals identified by the tribe(s) may apply for an Idaho American Indian Certificate as American Indian languages teachers. (3-25-16)

a. The Office of Indian Education at the State Department of Education will process an application that has met the requirements of the Tribe(s) for an American Indian languages teacher. (3-25-16)

b. Once an application with Tribal approval has been received, it will be reviewed and, if approved, it will be forwarded to the Office of Certification for a criminal history background check as required in Section 33-130, Idaho Code. The application must include a ten finger fingerprint card or scan and a fee for undergoing a criminal history check pursuant to Section 33-130, Idaho Code. (3-25-16)

c. The Office of Certification will review the application and verify the applicant is eligible for an Idaho American Indian Certificate. The State Department of Education shall authorize an eligible applicant as an American Indian languages teacher. An Idaho American Indian Certificate is valid for not more than five (5) years. Individuals may apply for a renewal certificate. (3-25-16)

~~12~~09. **Junior Reserved Officer Training Corps (Junior ROTC) Instructors**. (3-25-16)

a. Each school district with a Junior ROTC program shall provide the State Department of Education with a list of the names of those individuals who have completed an official armed forces training program to qualify as Junior ROTC instructors in high schools. (3-25-16)

b. Each school district with a Junior ROTC program shall provide the State Department of Education with a notarized copy of their certificate(s) of completion. (3-25-16)

c. Authorization Letter. Upon receiving the items identified in Subsections 015.12.a. and b., the State Department of Education shall issue a letter authorizing these individuals as Junior ROTC instructors. (3-25-16)

1~~3~~0. **Additional Renewal Requirements**. In addition to specific certificate or endorsement renewal requirements, applicants must meet the following renewal requirements as applicable: (3-25-16)

a. Mathematics In-Service Program. In order to recertify, the state approved mathematics instruction course titled "Mathematical Thinking for Instruction", or another State Department of Education approved alternative course, shall be required. The "Mathematical Thinking for Instruction" course consists of three (3) credits ~~(or forty-five (45) contact hours of in-service training)~~. Teachers ~~and administrators~~ must take one (1) of the three (3) courses developed that is most closely aligned with their current assignment prior to ~~September 1, 2014~~ July 1, 2019. Any teacher ~~or administrator~~ successfully completing said course shall be deemed to have met the requirement of Subsection 060.03.c. of this rule~~, regardless of whether such course is part of any official transcript~~ as long as said course is part of an official transcript or completed before September 1, 2013, and verified by the State Department of Education. Successful completion of a state approved mathematics instruction course shall be a one-time requirement for renewal of certification for those currently employed in an Idaho school district and shall be included within current requirements for continuing education for renewal. The following must successfully complete the "Mathematical Thinking for Instruction" course or another State Department of Education approved alternative course in order to recertify:

~~(3-25-16)~~(   )

i. Each teacher holding an Early Childhood/Early Childhood Special Education Blended ~~Certificate~~ endorsement (Birth - Grade 3) who is employed by a school district or charter school as a K-3 multi-subject or special education teacher; ~~(3-25-16)~~(   )

ii. Each teacher holding a ~~Standard Elementary~~Standard Instructional Certificate (K-8) who is employed by a school district or charter school as a K-6 multi-subject teacher; ~~(3-25-16)~~(   )

iii. Each teacher holding a ~~Standard Secondary~~Standard Instructional Certificate (6-12) teaching in a mathematics content classroom (grade six (6) through grade twelve (12)) including Title I who is employed by a school district or charter school; and ~~(3-25-16)~~(   )

iv. Each teacher holding a Standard Exceptional Child Generalist ~~Certificate~~ Endorsement ~~(K-12)~~ who is employed by a school district or charter school~~; and~~ as a special education teacher. ~~(3-25-16)~~(   )

~~v. Each school administrator holding an Administrator Certificate (Pre K-12) who is employed by a school district or charter school. (3-25-16)~~

b. Waiver of Mathematics In-Service Program. When applying for certificate renewal, an automatic waiver of the mathematics in-service program requirement shall be granted for any certificated individual living outside of the state of Idaho who is not currently employed as an educator in the state of Idaho. This waiver applies only as long as the individual remains outside the state of Idaho or as long as the individual is not employed as an educator in the state of Idaho. Upon returning to Idaho or employment in an Idaho public school, the educator will need to complete this requirement prior to the next renewal period. (3-25-16)

c. Idaho Comprehensive Literacy Course. In order to recertify, a state approved Idaho Comprehensive Literacy Course shall be required. Successful completion of a state approved Idaho Comprehensive Literacy course shall be a one-time requirement for renewal of certification for those currently employed in an Idaho school district and shall be included within current requirements for continuing education for renewal. The following individuals must successfully complete an Idaho Comprehensive Literacy course in order to recertify:

(3-25-16)

i. Each teacher holding an Early Childhood/Early Childhood Special Education Blended ~~Certificate~~ Endorsement (Birth - Grade 3) who is employed by a school district or charter school; (3-25-16)

ii. Each teacher holding a ~~Standard Elementary~~Standard Instructional Certificate (K-8) who is employed by a school district or charter school; and (3-25-16)

iii. Each teacher holding a Standard Exceptional Child ~~Certificate~~ Generalist Endorsement ~~(K-12)~~ who is employed by a school district or charter school. (3-25-16)

d. Administrator certificate renewal. In order to recertify, holders of an administrator certificate must complete a course consisting of a minimum of three (3) semester credits in the Idaho framework for teachers' evaluation pursuant to Section 33-1204, Idaho Code. Credits must be earned through an approved teacher preparation program and include a laboratory component. The laboratory component must include in-person or video observation and scoring of teacher performance using the statewide framework for teacher's evaluation. (3-25-16)

016. IDAHO INTERIM CERTIFICATE.

The State Department of Education or the Division of Career Technical Education, as applicable to the certificate, is authorized to issue a three-year (3) interim certificate to those applicants who hold a valid certificate/license from another state or other entity that participates in the National Association of State Directors of Teacher Education and Certification (NASDTEC) Interstate Agreement pursuant to Section 33-4104, Idaho Code or engaged in an alternate route to ~~authorization~~ certification as prescribed herein. ~~An interim certificate is nonrenewable except under extenuating circumstances approved by the State Department of Education.~~ (3-25-16)

01. Interim Certificate Not Renewable. Interim certification is only available on a one-time basis per individual except under extenuating circumstances approved by the State Department of Education. It will be the responsibility of the individual to meet the requirements of the applicable alternate authorization route and to obtain a full Idaho Educator Credential during the term of the interim certificate. (3-25-16)

02. Idaho Comprehensive Literacy Course. For all Idaho teachers working on interim certificates, alternate routes or coming from out of the state, completion of a state approved Idaho Comprehensive Literacy course shall be a one-time requirement for full certification. (3-25-16)

a. Those individuals who qualify for an Idaho certificate through state reciprocity shall be granted a three-year, non-renewable interim certificate to allow time to meet the Idaho Comprehensive Literacy Course requirement. (3-25-16)

03. Mathematical Thinking for Instruction. ~~Out-of-state applicants shall take the state approved mathematics instruction course titled "Mathematical Thinking for Instruction" as a certification requirement. The "Mathematical Thinking for Instruction" course consists of three (3) credits (or forty-five (45) contact hours of in-service training). Those individuals who qualify for an Idaho certificate through state reciprocity shall be granted a three-year, non-renewable, interim certificate to allow time to meet the Idaho Mathematics In-service program requirement.~~ For all Idaho teachers working on interim certificates (alternate authorizations, nontraditional routes, or coming from out of the state), with an All Subjects K-8 endorsement or any mathematics endorsement must complete~~ion of~~ a state approved Mathematical Thinking for Instruction, or another State Department of Education approved alternative course, as a one-time requirement to receive a standard instructional, standard occupational, or advanced occupational certificate. ( ) ~~(3-25-16)~~

04. Technology. Out-of-state applicants will be reviewed by the hiring district for technology deficiencies and may be required to take technology courses to improve their technology skills. (4-7-11)

05. Reinstatement of Expired Certificate. An individual holding an expired Idaho certificate may be issued a nonrenewable three-year interim certificate. During the validity period of the interim certificate, the applicant must meet all current requirements listed for the specific certificate and endorsement(s) including the appropriate content, pedagogy, and performance assessments. (3-29-12)

06. Foreign Institutions. An educator having graduated from a foreign institution that is listed in the Accredited Degree-Granting Institutions section of the "Accredited Institutions of Postsecondary Education" and having a valid/current teaching certificate/license from the country or province in which the foreign institution is located, may be issued a non-renewable, three-year interim certificate. The applicant must also complete the requirements listed in Section 013 of these rules. (4-2-08)

017. INTERSTATE CERTIFICATION COMPACT.
Idaho participates in the Interstate Agreement of Qualification of Education Personnel. This agreement applies equally to teachers entering Idaho from another compact-member state and to teachers entering another compact-member state from Idaho. The compact applies to classroom teachers only. Trades and industries teachers are not covered by the agreement. (Section 33-4104, Idaho Code) (4-1-97)

018. CONTENT, PEDAGOGY AND PERFORMANCE ASSESSMENT FOR CERTIFICATION.

01. Assessments. State Board of Education approved content, pedagogy and performance area assessments shall be used in the state of Idaho to ensure qualified teachers are employed in Idaho's classrooms. The Professional Standards Commission shall recommend assessments and qualifying scores to the State Board of Education for approval. (4-2-08)

02. Out-of-State Waivers. An out-of-state applicant for Idaho certification holding a current certificate may request a waiver from the above requirement. The applicant shall provide evidence of passing a state approved content, pedagogy and performance area assessment(s) or hold current National Board for Professional Standards Teaching Certificate. (4-2-08)

03. Idaho Comprehensive Literacy Assessment. All applicants for initial Idaho certification (Kindergarten through grade twelve (12)) from an Idaho approved teacher education program must demonstrate competency in comprehensive literacy. Areas to be included as parts of the assessment are: phonological awareness, phonics, fluency, vocabulary, comprehension, writing, and assessments and intervention strategies. Each Idaho public higher education institution shall be responsible for the assessment of teacher candidates in its teacher preparation program. The assessment must measure teaching skills and knowledge congruent with current research on best literacy practices for elementary students or secondary students (adolescent literacy) dependent upon level of certification and English Language Learners. In addition the assessment must measure understanding and the ability to apply strategies and beliefs about language, literacy instruction, and assessments based on current research and best practices congruent with International Reading Association/National Council of Teachers of English standards, National English Language Learner's Association professional teaching standards, National Council for Accreditation of Teacher Education standards, and state accreditation standards. (4-7-11)

04. Technology Assessment. All applicants for initial Idaho certification (Kindergarten through grade twelve (12)) from an Idaho approved teacher education program must demonstrate proficiency in relevant technology skills and practices to enhance classroom management and instruction. Each Idaho public higher education institution shall be responsible for the assessment of teacher candidates in its teacher preparation program. The assessment must measure understanding and the ability to apply strategies and beliefs about the integration of technology based on current research and best practices congruent with the International Society for Technology in Education professional teaching standards, the National Council for Accreditation of Teacher Education standards, and state accreditation standards. (4-7-11)

019. -- 020. (RESERVED)

021. ENDORSEMENTS.
Holders of a ~~Secondary Certificate or a Standard Elementary~~Standard Instructional Certificate, ~~Exceptional Child Certificate,~~ Standard Occupational Specialist Certificate, and Advanced Occupational Specialist Certificate may be granted endorsements in subject areas as provided herein. Idaho preparation programs shall prepare candidates for endorsements in accordance with the Idaho Standards for Initial Certification of Professional School Personnel. ~~An official statement of competency in a teaching area or field is acceptable in lieu of courses for a teaching major or minor if such statements originate in the department or division of the accredited college or university in which the competency is established and are approved by the director of teacher education of the recommending college or university.~~ To add an endorsement to an existing credential, an individual shall complete the credit hour requirements as provided herein and shall also meet or exceed the state qualifying score on appropriate, state approved content,

pedagogy and performance assessments. When converting semester credit hours to quarter credit hours, two (2) semester credit hours is equal to three (3) quarter credit hours. (4-4-13)

01. Clinical Experience Requirement. All endorsements require supervised teaching experience in the relevant content area, or a State Department of Education approved alternative clinical experience. (3-12-14)

0~~2~~3. Alternat~~e~~ive Authorization ~~Preparation Program~~to Endorsement. Candidates shall meet all requirements for the endorsement as provided herein. (3-25-16)

a. Option I - An official statement of competency in a teaching area or field is acceptable in lieu of courses for a teaching field if such statements originate in the department or division of the accredited college or university in which the competency is established and are approved by the director of teacher education of the recommending college or university.

~~a~~b. Option II - National Board. By earning National Board Certification in content specific areas, teachers may gain endorsement in a corresponding subject area. (3-25-16)

~~b~~c. Option III - Master's degree or higher. By earning a graduate degree in a content specific area, candidates may add an endorsement in that same content area to a valid certificate. (3-25-16)

~~c~~d. Option ~~III~~IV - Testing and/or Assessment. Two (2) pathways are available to some teachers, depending upon endorsement(s) already held. (3-25-16)

i. Pathway 1 - Endorsements may be added through state-approved testing and a mentoring component. The appropriate test must be successfully completed within the first year of authorization in an area closely compatible with an endorsement for which the candidate already qualifies and is experienced. Additionally requires the successful completion of a one (1)-year state-approved mentoring component. (3-25-16)

ii. Pathway 2 - Endorsements may be added through state-approved testing in an area less closely compatible with an endorsement for which the candidate already qualifies and is experienced. The appropriate test must be successfully completed within the first year of the authorization. Additionally requires the successful completion of a one (1)~~-~~ year state~~-~~ approved mentoring component and passing a final pedagogy assessment. (3-25-16)

022. ENDORSEMENTS A - D.

01. Agriculture Science and Technology (6-12). (3-16-04)

a. Forty-five (45) semester credit hours including course work in each of the following areas: agriculture education; agriculture mechanics; agriculture business management; soil science; animal science; and plant science~~.~~; or (3-16-04)

b. Occupational teacher preparation pursuant to Section 015.07 through 015.09~~coursework that relates to the appropriate area(s) as provided in Sections 034 through 038~~. (4-4-13)

02. American Government /Political Science (6-12). Twenty (20) semester credit hours to include: a minimum of six (6) semester credit hours in American Government, six (6) semester credit hours in U.S. History Survey, and a minimum of three (3) semester credit hours in Comparative Government. Remaining course work must be selected from Political Science. Course work may include three (3) semester credit hours in World History Survey. (4-11-06)

03. All Subjects (K-8). Allows one to teach in any educational setting (K-8). Twenty (20) semester credit hours, or thirty (30) quarter credit hours in the philosophical, psychological, methodological foundations, instructional technology, and professional subject matter must be in elementary education.

03. Art (K-~~12~~8, 5-9, or 6-12). Twenty (20) semester credit hours leading toward competency as defined by Idaho Standards for Visual Arts Teachers in the area of Art to include a minimum of nine (9) semester credit hours in: Foundation Art and Design. Additional course work must include at least two (2) Studio Areas and Secondary Arts Methods. ~~To obtain an Art (K-12) endorsement, applicants holding a Secondary Certificate must complete an elementary methods course.~~ (4-7-11)

04. Bilingual Education (K-12). Twenty (20) semester credit hours leading toward competency as defined by Idaho Standards for Bilingual Education Teachers to include all of the following: at least nine (9) upper division semester credit hours in one (1) Modern Language other than English, including writing and literature, and advanced proficiency according to the American Council on the Teaching of Foreign Languages (ACTFL) guidelines; cultural diversity; ENL/Bilingual Methods; second language acquisition theory and practice; Foundations of ENL/Bilingual Education, Federal and State Law, Testing/identification of Limited English Proficient Students; at least two (2) semester credit hours in Bilingual Practicum; and three (3) semester credit hours in a Bilingual Education related elective (ex: linguistics, critical pedagogy, parent involvement). (4-4-13)

05. Biological Science (5-9 or 6-12). Twenty (20) semester credit hours to include at least six (6) semester credit hours of course work in each of the following areas: Botany and Zoology. (3-16-04)

06. Birth through Grade Three (3). The Birth through Grade Three (3) endorsement allows one to teach in any educational setting birth through grade three (3). To be eligible, a candidate must have satisfied the following requirements. ~~(3-25-16)~~( )

a. A minimum of thirty (30) semester credit hours, or forty-five (45) quarter credit hours, in the philosophical, psychological, and methodological foundations, in instructional technology, and in the professional subject matter of early childhood and early childhood-special education. The professional subject matter shall include course work specific to the child from birth through grade three (3) in the areas of child development and learning; curriculum development and implementation; family and community relationships; assessment and evaluation; professionalism; and, application of technologies. ~~(3-25-16)~~( )

b. The required credit hours here in, shall include not less than six (6) semester credit hours, or nine (9) quarter credit hours, of early childhood student teaching (K-3) and field experiences birth to age three (3) programs, and age three (3) to age five (5) programs, and three (3) semester credit hours, or four (4) quarter credit hours, of developmental reading. ~~(3-25-16)~~( )

d. Proficiency in areas noted above is measured by ~~completion of the credit hour requirements provided herein.~~ one of the following options: ~~(3-25-16)~~( )

i. Option I: Demonstration of competency within the Idaho Standards for Blended Early Childhood Education/Early Childhood Special Education Teachers. Additionally, each candidate shall meet or exceed the state qualifying score on approved early-childhood assessments. ~~(3-25-16)~~( )

ii. Option II: Completion of a CAEP accredited program in blended early childhood education/early childhood special education birth through grade three (3). Additionally, each candidate shall meet or exceed the state qualifying score on approved early-childhood assessments. ( )

0~~6~~7. Business Technology Education (6-12). (3-16-04)

a. Twenty (20) semester credit hours to include course work in each of the following areas: accounting; computer and technical applications in business; economics; methods of teaching business education; Career technical Student Organization (PTSO) leadership; business communication/writing; and office procedures. Additional competencies may be satisfied through the following: entrepreneurship; finance; marketing; business law; and/or career guidance~~.~~; or (4-4-13)

b. Occupational teacher preparation pursuant to Section 015.07 through 015.09~~that relates to the appropriate area(s) as provided in Sections 034 through 038.~~ (4-4-13)

0~~7~~8. **Chemistry (5-9 or 6-12)**. Twenty (20) semester credit hours in the area of Chemistry. (3-16-04)

0~~8~~9. **Communication (5-9 or 6-12)**. Follow one (1) of the following options: (3-16-04)

a. Option I: Twenty (20) semester credit hours to include Methods of Teaching Speech/Communications plus course work in at least four (4) of the following areas: Interpersonal Communication/Human Relations; Argumentation/Personal Persuasion; Group Communications; Nonverbal Communication; Public Speaking; and Drama/Theater Arts. (3-16-04)

b. Option II: Possess an English endorsement plus at least twelve (12) semester credit hours distributed among the following: Interpersonal Communication/Human Relations, Public Speaking, and Methods of Teaching Speech/Communication. (3-16-04)

~~09~~10. **Computer Science (5-9 or 6-12)**. Twenty (20) semester credit hours of course work in Computer Science, including course work in the following areas: data representation and abstraction; design, development, and testing algorithms; software development process; digital devices systems network; and the role of computer science and its impact on the modern world. (3-25-16)

~~**10.** **Consulting Teacher/Teacher Leader Endorsement**. Consulting teachers provide technical assistance to teachers and other staff in the school district with regard to the selection and implementation of appropriate teaching materials, instructional strategies, and procedures to improve the educational outcomes for students. Candidates who hold this endorsement are teacher leaders who will facilitate the design and implementation of sustained, intensive, and job-embedded professional learning based on identified student and teacher needs. This endorsement is valid for five (5) years and is renewable based upon successful completion and verification of an additional four (4) semester credits beyond those required for standard certification renewal. The additional credits shall be taken for university or college credit consistent with the Individual Professional Learning Plan (IPLP). (3-25-16)~~

~~**a.** Special Education Consulting Teacher - Eligibility for Endorsement. To be eligible for a Special Education Consulting Teacher endorsement on the Standard Exceptional Child Certificate, the Early Childhood /Early Childhood Special Education Blended Certificate (Birth-Grade 3), the Standard Elementary Certificate or the Standard Secondary Teaching Certificate, a candidate must have satisfied the following requirements: (3-25-16)~~

~~i. Education Requirements. Qualify for or hold a Standard Exceptional Child Certificate and qualify for or hold a Standard Elementary Certificate, Standard Secondary Certificate, or Early Childhood/Early Childhood Special Education Blended Certificate (Birth-Grade 3), and hold a master's degree or an approved fifth year program as defined by the Idaho State Board of Education, and have demonstrated content competencies in the following areas: (3-25-16)~~

~~(1) Assessment of learning behaviors; (3-25-16)~~

~~(2) Individualization of instructional programs based on educational diagnosis; (3-25-16)~~

~~(3) Behavioral and/or classroom management techniques; (3-25-16)~~

~~(4) Program implementation and supervision; (3-25-16)~~

~~(5) Knowledge in use of current methods, materials and resources available and management and operation of media centers; (3-25-16)~~

~~(6) Ability in identifying and utilizing community or agency resources and support services; and (3-25-16)~~

~~(7) Counseling skills and guidance of professional staff. (3-25-16)~~

~~ii. Experience. Completion of a minimum of three (3) years' teaching experience, at least two (2) years of which must be in a special education classroom setting. (3-25-16)~~

~~iii. Provides verification of completion of a state-approved program of at least twenty (20) semester credit hours of study at an accredited college or university or a state-approved equivalent. Program shall include: (3-25-16)~~

~~(1) Ninety (90) contact hours to include a combination of face-to-face and field-based professional development activities; and (3-25-16)~~

~~(2) The development and presentation of a culminating portfolio that provides evidence that knowledge gained and skills acquired are aligned with Idaho Teacher Leader Standards as follows: (3-25-16)~~

~~(a) Understanding Adults As Learners to Support Professional Learning Communities; (3-25-16)~~

~~(b) Accessing and Using Research to Improve Practice and Student Achievement; (3-25-16)~~

~~(c) Promoting Professional Learning for Continuous Improvement; (3-25-16)~~

~~(d) Facilitating Improvements in Instruction and Student Learning; (3-25-16)~~

~~(e) Using Assessments and Data for School and District Improvement; (3-25-16)~~

~~(f) Improving Outreach and Collaboration with Families and Community; and (3-25-16)~~

~~(g) Advocating for Student Learning and the Profession. (3-25-16)~~

~~iv. Not less than one (1) semester of successful experience as a special education teacher working with classroom teachers in elementary or secondary schools. (3-25-16)~~

~~**b.** Mathematics Consulting Teacher - Eligibility for Endorsement. To be eligible for a Mathematics Consulting Teacher endorsement on the Standard Elementary Certificate, Standard Secondary Certificate, Standard Exceptional Child Certificate, or Early Childhood/Early Childhood Special Education Blended Certificate (Birth-Grade 3), a candidate must have satisfied the following requirements: (3-25-16)~~

~~i. Education Requirements. Qualify for or hold a Standard Elementary Certificate, Standard Secondary Certificate, Standard Exceptional Child Certificate, or Early Childhood/Early Childhood Special Education Blended Certificate (Birth-Grade 3) and have demonstrated content competencies. Coursework and content domains required include the full series of Mathematics Thinking for Instruction (MTI), Number and Operation, Geometry, Algebraic Reasoning, Measurement and Data Analysis, and Statistics and Probability which are centered on the following emphases: (3-25-16)~~

~~(1) Structural Components of Mathematics; (3-25-16)~~

~~(2) Modeling, Justification, Proof and Generalization; (3-25-16)~~

~~(3) Mathematical Knowledge for Teaching (Ball, Thames, & Phelps, 2008). (3-25-16)~~

~~ii. Experience. Completion of a minimum of three (3) years' teaching experience. (3-25-16)~~

~~iii. Provides verification of completion of a state-approved program of at least twenty (20) semester credit hours of study at an accredited college or university or a state-approved equivalent. Program shall include: (3-25-16)~~

~~(1) Ninety (90) contact hours to include a combination of face-to-face and field-based professional development activities; and (3-25-16)~~

~~(2) The development and presentation of a culminating portfolio that provides evidence that knowledge gained and skills acquired are aligned with Idaho Teacher Leader Standards as follows: (3-25-16)~~

~~(a) Understanding Adults As Learners to Support Professional Learning Communities; (3-25-16)~~

~~(b) Accessing and Using Research to Improve Practice and Student Achievement; (3-25-16)~~

~~(c) Promoting Professional Learning for Continuous Improvement; (3-25-16)~~

~~(d) Facilitating Improvements in Instruction and Student Learning; (3-25-16)~~

~~(e) Using Assessments and Data for School and District Improvement; (3-25-16)~~

~~(f) Improving Outreach and Collaboration with Families and Community; and (3-25-16)~~

~~(g) Advocating for Student Learning and the Profession. (3-25-16)~~

~~iv. Not less than one (1) semester of successful experience as a mathematics teacher working with classroom teachers in elementary or secondary schools. (3-25-16)~~

11. Deaf/Hard of Hearing (K-12). Completion of a minimum of thirty-three (33) semester credit hours in the area of deaf/hard of hearing with an emphasis on instruction for students who use sign language or completion of a minimum thirty-three (33) semester credit hours in the area of deaf/hard of hearing with an emphasis on instruction for students who use listening and spoken language. An institutional recommendation specific to this endorsement is required. To be eligible for a Deaf/Hard of Hearing endorsement, a candidate must have satisfied the following requirements: (3-25-16)

i. Completion of a baccalaureate degree from an accredited college or university; (3-25-16)

ii. Completion of a program from an Idaho college or university in elementary, secondary, or special education currently approved by the Idaho State Board of Education; or (3-25-16)

iii. Completion of a program from an out-of-state college or university in elementary, secondary, or special education currently approved by the state educational agency of the state in which the program was completed; and (3-25-16)

iv. Completion of a program of a minimum of thirty-three (33) semester credit hours in the area of Deaf/Hard of Hearing and must receive an institutional recommendation specific to this endorsement from an accredited college or university. (3-25-16)

11. Drama (K-8, 5-9 or 6-12). Twenty (20) semester credit hours leading toward competency as defined by Idaho Standards for Drama Teachers, including a minimum of sixteen (16) semester credit hours in Drama or Theater Arts, including course work in each of the following: Acting, Directing, and Technical Stage Production, and four (4) semester credit hours in Communications. To obtain a Drama (6-12) endorsement, applicants must complete a comprehensive methods course including the pedagogy of acting, directing and technical theatre.(4-7-11)

023. ENDORSEMENTS E - L.

01. Early Childhood Special Education (Pre-K-3). The Early Childhood Special Education (Pre-K-3) endorsement is non-categorical and allows one to teach in any Pre-K-3 special education setting. This endorsement may only in conjunction with the Generalist K-12. To be eligible a candidate must have satisfied the following requirements: (3-25-16)

i. Completion of a program of a minimum of twenty (20) semester credit hours in the area of Early Childhood Education to include course work in each of the following areas: child development and behavior with emphasis in cognitive-language, physical, social and emotional areas, birth through age eight (8); curriculum and program development for young children ages three to eight (3-8); methodology: planning, implementing and evaluating environments and materials for young children ages three to eight (3-8); guiding young children's behavior: observing, assessing and individualizing ages three to eight (3-8); identifying and working with atypical young children ages three to eight (3-8) parent-teacher relations; and student teaching at the Pre-K - 3 grades. (3-25-16)

01. Earth Science (5-9 or 6-12). Twenty (20) semester credit hours including course work in each of the following: Earth Science, Astronomy, and Geology. (4-11-06)

02. Economics (6-12). Twenty (20) semester credit hours to include a minimum of three (3) semester credit hours of micro-economics, a minimum of three (3) semester credit hours of macro-economics, and a minimum of six (6) semester credit hours of Personal Finance/Consumer Economics/Economics Methods. Remaining course work may be selected from economics and finance course work in one (1) or more of the following areas: Agriculture Science and Technology, Business Education, Economics, Family and Consumer Science, or Marketing Education. (4-11-06)

03. Engineering (5-9 or 6-12).

a. Twenty (20) semester credit hours of engineering course work~~.~~; or

b. Occupational teacher preparation pursuant to Section 015.07 through 015.09. (3-25-16)

04. English (5-9 or 6-12). Twenty (20) semester credit hours, including three (3) semester credit hours in Linguistics/Grammar, three (3) semester credit hours in American Literature, three (3) semester credit hours in English Literature, six (6) semester credit hours in Advanced Composition, excluding the introductory sequence designed to meet general education requirements. Remaining credits must be completed in the English Department, and must include some course work in Writing Methods for Teachers of Secondary Students. (3-16-04)

05. English as a New Language (ENL) (K-12). Twenty (20) semester credit hours leading toward competency as defined by Idaho Standards for ENL Teachers to include all of the following: at least four (4) semester credit hours in a modern language other than English; Cultural Diversity; ENL Methods; Linguistics; second language acquisition theory and practice; Foundations of ENL/Bilingual Education, Federal and State Law, Testing/Identification of Limited English Proficient Students; and at least one (1) semester credit in ENL Practicum or Field Experience. (4-4-13)

06. Exceptional Child Generalist (K-8, 6-12, or K-12). The Exceptional Child Generalist endorsement is non-categorical and allows one to teach in any special education setting, applicable to the grade range of the endorsement. Regardless of prior special education experience, all initial applicants must provide an institutional recommendation that an approved special education program has been completed, with field work to include student teaching in an elementary or secondary special education setting. To be eligible, a candidate must have satisfied the following requirements: (3-25-16)

iii. Completion of thirty (30) semester credit hours in special education, or closely related areas, as part of an approved special education program; and (3-25-16)

iv. Each candidate must have a qualifying score on an approved core content assessment and a second assessment related to the specific endorsement requested. (3-25-16)

~~06~~07. **Family and Consumer Sciences (5-9 or 6-12)**. (4-4-13)

a. Thirty (30) semester credit hours to include coursework in each of the following areas: Child/Human Development; Human/Family Relations; Directed Laboratory Experience in Childcare; Apparel and Textiles, Cultural Dress, Fashion Merchandising, or Design; Nutrition; Food Preparation, Food Production, or Culinary Arts; Housing, Interior Design, Home Management, or Equipment; Consumer Economics or Family Resource Management; Introduction to Family Consumer Sciences; Career technical Student Organization (PTSO) leadership; and Integration of Family Consumer Sciences or Family Consumer Science Methods; or~~.~~ (4-4-13)

b. Occupational teacher preparation ~~that relates to the appropriate area(s) as provided in Sections 034 through 038~~pursuant to Section 015.07 through 015.09. (4-4-13)

~~07~~08. **Geography (5-9 or 6-12)**. Twenty (20) semester credit hours including course work in Cultural Geography and Physical Geography, and a maximum of six (6) semester credit hours in World History Survey. The ~~R~~remaining semester credit hours must be selected from Geography. (4-11-06)

~~08~~09. **Geology (5-9 or 6-12)**. Twenty (20) semester credit hours in the area of Geology. (3-16-04)

~~09~~10. **Gifted and Talented (K-12)**. Twenty (20) semester credit hours leading toward competency as defined by Idaho Standards for Gifted and Talented Education Teachers, to include semester credit hours in each of the following areas: Foundations of Gifted and Talented Education; Creative/Critical Thinking Skills for Gifted and Talented Students; Social and Emotional Needs of Gifted and Talented Students; Curriculum, Instruction, and Assessment for Gifted and Talented Students; Differentiated Instruction and Programing for Gifted and Talented Students; and Practicum and Program Design for Gifted and Talented Education. Remaining course work must be in the area of gifted education. (3-12-14)

~~10~~11. **Health (6-12 or K-12, 5-9)**. Twenty (20) semester credit hours to include course work in Organization/Administration/Planning of a School Health Program; Health and Wellness; Secondary Methods of Teaching Health; Mental/Emotional Health; Nutrition; Human Sexuality; Substance Use and Abuse. Remaining semester credits must be in health-related course work. To obtain a Health K-12 endorsement, applicants must complete an elementary Health methods course. (4-4-13)

~~11~~12. **History (5-9 or 6-12)**. Twenty (20) semester credit hours to include a minimum of six (6) semester credit hours of U.S. History Survey and a minimum of six (6) semester credit hours of World History Survey. Remaining course work must be in History. Course work may include three (3) semester credit hours in American Government.
(4-11-06)

~~12~~13. **Humanities (5-9 or 6-12)**. An endorsement in English, History, Music, Visual Art, Drama, or Foreign Language and twenty (20) semester credit hours in one of the following areas or ten (10) semester credit hours in each of two (2) of the following areas: Literature, Music, Foreign Language, Humanities Survey, History, Visual Art, Philosophy, Drama, Comparative World Religion, Architecture, and Dance. (4-11-06)

~~13~~14. **Journalism (5-9 or 6-12)**. Follow one (1) of the following options: (3-16-04)

a. Option I: Twenty (20) semester credit hours to include a minimum of sixteen (16) semester credit hours in Journalism and four (4) semester credit hours in English. (3-16-04)

b. Option II: Possess an English endorsement with a minimum of six (6) semester credit hours in Journalism. (3-16-04)

~~14~~15. **Literacy (K-12)**. Twenty-one (21) semester credit hours leading toward competency as defined by

Idaho Standards for Literacy Teachers to include the following areas: Foundations of Literacy (including reading, writing, and New Literacies); Development and Diversity of Literacy Learners; Literacy in the Content Area; Literature for Youth; Language Development; Corrective/Diagnostic/Remedial Reading; and Writing Instruction. To obtain a Literacy endorsement, applicants must complete the Idaho Comprehensive Literacy Course or the Idaho Comprehensive Literacy Assessment. (3-12-14)

024. ENDORSEMENTS M - Z.

01. Marketing Technology Education (6-12). (3-16-04)

a. Twenty (20) semester credit hours to include course work in each of the following areas: Marketing; Management; Economics; Coordination of Cooperative Programs; Merchandising/Retailing; Methods of Teaching Marketing Education; and Career technical Student Organization (PTSO) Leadership, with remaining credit hours in Entrepreneurship; Hospitality and Tourism; Finance; or Accounting. (4-4-13)

b. Occupational teacher preparation pursuant to Section 015.07 through 015.09~~that relates to the appropriate area(s) as provided in Sections 034 through 038~~. (4-4-13)

02. Mathematics - Basic (5-9 or 6-12). Twenty (20) semester credit hours in Mathematics including course work in Algebra, Geometry, and Trigonometry. Six (6) semester credit hours of computer programming may be substituted for six (6) semester credits in Mathematics. (3-16-04)

03. Mathematics (5-9 or 6-12). Twenty (20) semester credit hours including course work in each of the following areas: Geometry, Linear Algebra, Discrete Mathematics, Probability and Statistics, and a minimum of three (3) semester credit hours of Calculus. Statistics course work may be taken from a department other than the mathematics department. (4-11-06)

04. Music (5-9 or 6-12 or K-12). Twenty (20) semester credit hours leading toward competency as defined by Idaho Standards for Music Teachers to include course work in the following: Theory and Harmony; Aural Skills, Music History; Conducting; Applied Music; and Piano Proficiency (Class Piano or Applied Piano), and Secondary Music Methods/Materials. To obtain a Music K-12 endorsement, applicants must complete an elementary music methods course. (4-7-11)

05. Natural Science (5-9 or 6-12). Follow one (1) of the following options: (4-7-11)

a. Option I: Must hold an existing endorsement in one of the following areas: Biological Science, Chemistry, Earth Science, Geology, or Physics; and complete a total of twenty-four (24) semester credit hours as follows: (4-7-11)

i. Existing Biological Science Endorsement. Minimum of eight (8) semester credit hours in each of the following areas: Physics, Chemistry, and Earth Science or Geology. (4-7-11)

ii. Existing Physics Endorsement. Minimum of eight (8) semester credit hours in each of the following areas: Biology, Chemistry, and Earth Science or Geology. (4-7-11)

iii. Existing Chemistry Endorsement. Minimum of eight (8) semester credit hours in each of the following areas: Biology, Physics, and Earth Science or Geology. (4-7-11)

iv. Existing Earth Science or Geology Endorsement. Minimum of eight (8) semester credit hours in each of the following areas: Biology, Physics, and Chemistry. (4-7-11)

b. Option II: Must hold an existing endorsement in Agriculture Science and Technology; and complete twenty (20) semester credit hours with at least four (4) semester credit hours in each of the following areas: Biology, Chemistry, Earth Science or Geology, and Physics. (4-7-11)

06. Online-Teacher Endorsement (Pre-K-12). To be eligible for an Online-Teacher Endorsement (Pre-K-12), a candidate must have satisfied the following requirements: (3-25-16)

a. Meets the states' professional teaching and/or licensure standards and is qualified to teach in his/her field of study. (3-25-16)

b. Provides evidence of online experience or course time both as a student and as a learner, and demonstrates online learning and teaching proficiency. (3-25-16)

c. Has completed an eight (8) week online teaching internship in a Pre-K-12 program, or has one (1) year of verifiable and successful experience as a teacher delivering curriculum online in grades Pre-K-12 within the past three (3) years. (3-25-16)

d. Provides verification of completion of a state-approved program of at least twenty (20) semester credit hours of study in online teaching and learning at an accredited college or university or a state-approved equivalent. (3-25-16)

e. Demonstrates proficiency in the Idaho Standards for Online Teachers including the following competencies: (3-25-16)

i. Knowledge of Online Education and Human Development; (3-25-16)

ii. Facilitate and Inspire Student Learning and Creativity; (3-25-16)

iii. Design and Develop Digital-Age Learning Experiences and Assessments Standards; (3-25-16)

iv. Model Digital-Age Work and Learning; Promote and Model Digital Citizenship and Responsibility Standards; and (3-25-16)

v. Engage in Professional Growth and Leadership. (3-25-16)

07. Physics (6-12). Twenty (20) semester credit hours in the area of Physics. (3-16-04)

08. Physical Education (PE) (5-9 or 6-12 or K-12). Twenty (20) semester credit hours to include course work in each of the following areas: Sport, Movement, and Outdoor Skills; Secondary PE Methods; Student Evaluation in PE; Administration of a PE Program; Safety and Prevention of Injuries; Fitness and Wellness; PE for Special Populations; Exercise Physiology; Kinesiology/Biomechanics; Sports Psychology or Sociology; Motor Behavior; and Current CPR and First Aid Certification. To obtain a PE K-12 endorsement, applicants must complete an elementary PE methods course. (4-4-13)

~~**09. Physical Education/Health**. Must have an endorsement in both physical education and health. (3-30-07)~~

~~10~~09. Physical Science (5-9 or 6-12). Twenty (20) semester credit hours in the area of physical science to include a minimum of eight (8) semester credit hours in each of the following: Chemistry and Physics. (3-16-04)

1~~1~~0. Psychology (5-9 or ~~-~~6-12) Twenty (20) semester credit hours in the area of Psychology. (3-16-04)

11. Pre-K through Grade Six (6) Endorsement. The Pre-K through Grade Six (6) endorsement allows one to teach in any Pre-K through grade six (6) education setting, except in a middle school setting. This endorsement may only be added to the Blended Early Childhood Education/Early Childhood Special Education Certificate in conjunction with the Birth through Grade Three (3) endorsement. To be eligible for a Blended Early

Childhood Education/Early Childhood Special Education Certificate with an Early Pre-K through Grade Six (6) endorsement, a candidate must have satisfied the following requirements: ( )

i. Completion of a program of a minimum of twenty (20) semester credit hours in the area of Elementary Education to include coursework in each of the following areas: methodology (literacy, mathematics, science, physical education, art); content knowledge (mathematics, literacy, science, health, art); technology; assessment; and, field experiences in grades four (4) through six (6). ( )

12. Social Studies (5-9 or 6-12). Must have an endorsement in History, American Government/Political Science, Economics, or Geography plus a minimum of twelve (12) semester credit hours in each of the remaining core endorsements areas: History, Geography, Economics, and American Government/Political Science. (3-29-10)

13. Sociology (5-9 or 6-12). Twenty (20) semester credit hours in the area of Sociology. (3-16-04)

14. Sociology/Anthropology (5-9 or 6-12). Twenty (20) semester credit hours including a minimum of six (6) semester credit hours in each of the following: Anthropology and Sociology. (3-16-04)

15. Teacher Librarian (K-12). Twenty (20) semester credit hours of coursework leading toward competency as defined by Idaho Standards for Teacher Librarians to include the following: Collection Development/Materials Selection, Literature for Children and/or Young Adults; Organization of Information (Cataloging and Classification); School Library Administration/Management; Library Information Technologies; Information Literacy; and Reference and Information Service. (3-12-14)

16. Technology Education (5-9 or 6-12). (3-16-04)

a. Twenty (20) semester credit hours to include course work in each of the following areas: Communication Technology; Computer Applications; Construction Technology; Electronics Technology; Manufacturing Technology; Power, Energy and Transportation and other relevant emerging technologies; and Principles of Engineering Design. (4-4-13)

b. Occupational teacher preparation pursuant to Section 015.07 through 015.09~~that relates to the appropriate area(s) as provided in Subsections 015.07 through 015.09~~. (3-25-16)

17. Visual Impairment Endorsement (K-12). Completion of a program of a minimum of thirty (30) semester credit hours in the area of visual impairment. An institutional recommendation specific to this endorsement is required. To be eligible for a Visually Impaired endorsement, a candidate must have satisfied the following requirements: (3-25-16)

i. Completion of a baccalaureate degree from an accredited college or university; (3-25-16)

ii. Completion in an Idaho college or university of a program in elementary, secondary, or special education currently approved by the Idaho State Board of Education, or completion in an out-of-state college or university of a program in elementary, secondary, or special education currently approved by the state educational agency of the state in which the program was completed; (3-25-16)

iii. Completion of a program of a minimum of thirty (30) semester credit hours in the area of Visual Impairment and must receive an institutional recommendation specific to this endorsement from an accredited college or university; and (3-25-16)

iv. Each candidate must have a qualifying score on an approved core content assessment and a second assessment related to the specific endorsement requested. (3-25-16)

1~~7~~8. World Language (5-9, 6-12 or K-12). Twenty (20) semester credit hours to include a minimum of twelve (12) upper division credits in a specific world language taken within the last ten (10) years leading to a proficiency level as defined by a state-approved exam (for example, a passing grade on the Praxis or an Advanced level as defined by the American Council on the Teaching of Foreign Languages (ACTFL)). Course work must include two (2) or more of the following areas: Grammar, Conversation, Composition, Culture, and Literature; and course work in Foreign Language Methods. ~~To obtain an endorsement in a specific foreign language (K-12), applicants holding a Secondary Certificate must complete an elementary methods course.~~ (4-4-13)

~~025~~019. -- 041. (RESERVED)

042. ALTERNATE ROUTES TO CERTIFICATION.

The purpose of this program is to provide an alternative for individuals to become certificated teachers in Idaho without following a standard teacher education program. Alternative Routes to Certification shall allow individuals to serve as the teacher of record prior to having earned full certification status. The teacher of record is defined as the person who is primarily responsible for planning instruction, delivering instruction, assessing students formatively and summatively, and designating the final grade. Individuals who are currently employed as ~~Para-Educator~~ Paraprofessionals. ~~and I~~individuals with strong subject matter background but limited experience with educational methodology shall follow the alternate certification requirements provided herein. Individuals who are currently certificated to teach but who are in need of an emergency ~~certification~~ endorsement in another area may obtain an endorsement through an alternate route as described in subsection 021.02 of these rules. (3-25-16)

01. Alternative Authorization -- Teacher To New Certification. The purpose of this alternative authorization is to allow Idaho school districts to request ~~endorsement/~~certification when a professional position cannot be filled with someone who has the correct ~~endorsement/~~certification. Alternative authorization in this area is valid for one (1) year and may be renewed for two (2) additional years with evidence of satisfactory progress toward completion of an approved alternative route preparation program. Interim certification is valid for not more than three (3) years total. (3-25-16)

a. Prior to application, a candidate must hold a ~~Bachelor's~~baccalaureate degree, and a valid Idaho ~~teacher~~ instructional certificate ~~without full endorsement in content area of need~~. The school district must provide supportive information attesting to the ability of the candidate to fill the position. (3-25-16)

b. A candidate must participate in an approved alternative route preparation program. (3-25-16)

i. The candidate will work toward completion of the alternative route preparation program through a participating college/university, and the employing school district. The candidate must complete a minimum of nine (9) semester credits annually to maintain eligibility for renewal; and (3-25-16)

ii. The participating college/university shall provide procedures to assess and credit equivalent knowledge, dispositions, and relevant life/work experiences. (3-20-04)

02. Alternative Authorization -- Content Specialist. The purpose of this alternative authorization is to offer an expedited route to certification for individuals who are highly and uniquely qualified in a subject area to teach in a district with an identified need for teachers in that area. Alternative authorization in this area is valid for one (1) year and may be renewed for two (2) additional years with evidence of satisfactory progress toward completion of an approved alternative route preparation program. Interim certification is valid for not more than three (3) years total. (3-25-16)

a. Initial Qualifications. (3-20-04)

i. A candidate must hold a ~~Bachelor's~~baccalaureate degree or have completed all of the requirements of a ~~Bachelor's~~baccalaureate degree except the student teaching or practicum portion; and (3-25-16)

ii. The hiring district shall ensure the candidate is qualified to teach in the area of identified need through demonstrated content knowledge. This may be accomplished through a combination of employment experience and education. (3-25-16)

b. Alternative Route Preparation Program -- College/University Preparation or Other State Board Approved Certification Program. (3-25-16)

i. At the time of authorization a consortium comprised of a designee from the college/university to be attended or other state board approved certification program, and a representative from the school district, and the candidate shall determine the preparation needed to meet the Idaho Standards for Initial Certification of Professional School Personnel. This plan must include mentoring and a minimum of one (1) classroom observation by the mentor per month, which will include feedback and reflection, while teaching under the alternative authorization. The plan must include annual progress goals that must be met for annual renewal; (3-25-16)

ii. The candidate must complete~~s eight (8) to sixteen (16) weeks~~ a minimum of nine semester credit hours or its equivalent of accelerated study in education pedagogy prior to the end of the first year of authorization. The number of required ~~weeks~~ credits will be specified in the consortium developed plan; (3-25-16)

iii. At the time of authorization the candidate must enroll in and work toward completion of the alternative route preparation program through a participating college/university or other state board approved certification program, and the employing school district. A teacher must attend, participate in, and successfully complete an individualized alternative route preparation program as one (1) of the conditions for annual renewal and to receive a recommendation for full certification; (3-25-16)

iv. The participating college/university or other state board approved certification program shall provide procedures to assess and credit equivalent knowledge, dispositions and relevant life/work experiences; and (3-25-16)

v. Prior to entering the classroom, the candidate shall meet or exceed the state qualifying score on appropriate state-approved content, pedagogy, or performance assessment. (3-20-04)

03. Non-Traditional Route to Teacher Certification. An individual may acquire interim certification as found in Section 016 of these rules through an approved non-traditional route certification program. (3-25-16)

a. Individuals who possess a ~~bachelor's~~baccalaureate degree or higher from an accredited institution of higher education may utilize this non-traditional route to an interim Idaho Teacher Certification. (3-25-16)

b. To complete this non-traditional route, the individual must: (3-25-16)

i. Complete a Board approved program; (4-6-05)

ii. Pass the Board approved pedagogy and content knowledge exams; and (4-6-05)

iii. Complete the Idaho Department of Education Criminal History Check. (4-6-05)

c. Interim Certificate. Upon completion of the certification process described herein, the individual will be awarded an interim certificate from the State Department of Education's ~~Bureau of~~ Certification and Professional Standards Department. During the term of the interim certificate, teaching by the individual must be done in conjunction with a two (2) year teacher mentoring program approved by the Board. The individual must complete the mentoring program during the term of the interim certificate. In the case where teachers start their mentoring program in the third year of their interim certificate, they must apply to the State Department of Education Teacher Certification Department for a waiver to complete the final year of their mentoring program for full certification. All laws and rules governing the fully certificated teachers with respect to conduct, discipline and professional standards shall apply to individuals teaching under any Idaho certificate including an interim certificate. (3-25-16)

d. Interim Certificate Not Renewable. Interim certification hereunder is only available on a one (1) time basis per individual. It will be the responsibility of the individual to obtain a valid renewable Idaho Educator Credential during the three (3) year interim certification term. (3-25-16)

e. Types of Certificates and Endorsements. The non-traditional route may be used for first-time certification, subsequent certificates, and additional endorsements. (3-20-14)

04. Alternative Authorization - Pupil Personnel Services. The purpose of this alternative authorization is to allow Idaho school districts to request endorsement/certification when a position requiring the Pupil Personnel Services certificate cannot be filled with someone who has the correct endorsement/certification. The exception to this rule is the Interim School Nurse endorsement and the Interim Speech Language Pathologist endorsement. The requirements for these endorsements are defined in Subsection 015.04 of these rules. The alternate authorization is valid for one (1) year and may be renewed for two (2) additional years with evidence of satisfactory progress toward completion of an approved alternative route preparation program. Interim certification is valid for not more than three (3) years total. (3-25-16)

a. Initial Qualifications. The applicant must complete the following: (4-2-08)

i. Prior to application, a candidate must hold a master's degree and hold a current Idaho license from the Bureau of Occupational Licenses in the area of desired certification; and (3-25-16)

ii. The employing school district must provide supportive information attesting to the ability of the candidate to fill the position. (4-2-08)

b. Alternative Route Preparation Program. (4-2-08)

i. The candidate must work toward completion of the alternative route preparation program through a participating college/university and the employing school district. The alternative route preparation program must include annual progress goals. (3-25-16)

ii. The candidate must complete a minimum of nine (9) semester credits annually to be eligible for extension of up to a total of three (3) years. (4-2-08)

iii. The participating college/university or the State Department of Education will provide procedures to assess and credit equivalent knowledge, dispositions, and relevant life/work experiences. (4-2-08)

iv. The candidate must meet all requirements for the endorsement/certificate as provided herein. (4-2-08)

05. Alternate Authorization Renewal. Annual renewal will be based on the school year and satisfactory progress toward completion of the applicable alternate authorization requirements. (3-25-16)

043. -- 059. (RESERVED)

060. APPLICATION PROCEDURES / PROFESSIONAL DEVELOPMENT.

~~01. Application for Idaho Certificate.~~ To obtain a new, renew, or reinstate an Idaho ~~certificate~~Educator Credential, the applicant ~~will~~ must submit an application on a form supplied by the State Department of Education or the ~~State~~ Division of Career Technical Education as applicable to the type certificate. All applications for new, renewed or reinstated occupational specialist certificates must be submitted to the Division of Career Technical Education. The following requirements must be met to renew or reinstate an Idaho Educator Credential. (3-16-04)

~~02~~01. **State Board of Education Requirements for Professional Growth**. (4-1-97)

a. Credits taken for recertification must be educationally related to the professional development of the applicant. (4-1-97)

i. Credits must be specifically tied to content areas and/or an area of any other endorsement; or (5-8-09)

ii. Credits must be specific to pedagogical best practices or for administrative/teacher leadership; or (4-2-08)

iii. Credits must be tied to a specific area of need designated by district administration. (4-2-08)

b. Graduate or undergraduate credit will be accepted for recertification. Credit must be college transferable and completed through an accredited college or university. (4-1-97)

c. All requests for equivalent ~~inservice~~in-service training to apply toward recertification, except occupational specialist certificates, must be made through the State Department of Education upon recommendation of the board of trustees consistent with the State Department of Education guidelines. Individuals holding ~~Career Technical~~Occupational Specialist Certificates must be made through the ~~must receive State~~ Division of Career Technical Education. Applicants must receive prior approval of ~~inservice~~in-service training and course work prior to applying for renewal. (3-16-04)

d. At least fifteen (15) hours of formal instruction must be given for each hour of ~~inservice~~in-service credit granted. (4-1-97)

e. Recertification credits may not be carried over from one (1) recertification period to the next. (4-1-97)

f. Certificated personnel teaching in subjects outside their major area of preparation will be encouraged to complete the courses required for major certification endorsement. (4-1-97)

g. All credits gained through coursework taken during the validity period of the certificate and commencing prior to September 1, 2008 shall be accepted toward recertification. (5-8-09)

h. An appeals process, developed by the State Department of Education in conjunction with the Professional Standards Commission or the Division of Career Technical Education, as applicable to the certificate type, shall be available to applicants whose credits submitted for recertification, in part or as a whole, are rejected for any reason if such denial prevents an applicant from renewing an Idaho certificate. An applicant whose credits submitted for recertification are rejected, in part or as a whole, within six (6) months of the expiration of the applicant's current certification shall be granted an automatic appeal and a temporary certification extension during the appeal or for one (1) year, whichever is greater. (5-8-09)

~~03~~02. **State Board of Education Professional Development Requirements**. (4-1-97)

a. Districts will have professional development plans. (4-1-97)

b. All certificated personnel will be required to complete at least six (6) semester hours or the equivalent within the five (5) year period of validity of the certificate being renewed. (4-1-97)

c. At least three (3) semester credits will be taken for university or college credit. Verification will be by official transcript. (4-1-97)

061. -- 065. (RESERVED)

066. FEES.
The state department of education shall maintain a record of all certificates issued, showing names, dates of issue and renewal, and if revoked, the date thereof and the reason therefor. A nonrefundable fee shall accompany each application for a prekindergarten through grade twelve (12) certificate, alternate certificate, change in certificate or replacement as follows: (3-16-04)

01. Initial Certificate. All types, issued for five (5) years -- seventy-five dollars ($75). (3-16-04)

02. Renewal Certificate. All types, issued for five (5) years -- seventy-five dollars ($75). (3-16-04)

03. Alternate Route Authorization. All types, issued for one (1) year -- one hundred dollars ($100). (3-16-04)

04. Additions or Changes During the Life of an Existing Certificate. Twenty-five dollars ($25). (3-16-04)

05. To Replace an Existing Certificate. Ten dollars ($10). (3-16-04)

067. -- 074. (RESERVED)

075. FINGERPRINTING AND CRIMINAL HISTORY CHECKS (SECTIONS 33-130 AND 33-512, IDAHO CODE).
All certificated and noncertificated employees and other individuals who are required by the provisions of Section 33-130, Idaho Code, must undergo a criminal history check. (4-9-09)

01. Definitions. (4-9-09)

a. Applicant. An individual applying for Idaho Certification or a certificated or non-certificated individual applying for employment. (4-9-09)

b. Break-in-Service. A voluntary or involuntary termination in employment, including retirement. (4-9-09)

c. Candidate. An individual attending a postsecondary program. (4-9-09)

d. Certificated Employee. An individual who holds an Idaho education certificate and is employed in a certificated position in a LEA. (4-9-09)

e. Contractor. An agency, company/business, or individual that has signed a contract or agreement to provide services to an LEA and private or parochial school. (4-9-09)

f. Conviction. The final judgment on a verdict or finding of guilty, a plea of guilty, a plea of nolo contendere, or the sentence has been suspended, deferred, or withheld on a felony or misdemeanor as defined by Section 18-110 and Section 18-111, Idaho Code. (4-9-09)

g. Criminal History Check (CHC). A ten (10) finger fingerprint process to determine if an applicant has criminal arrests and convictions in Idaho, any other state, or applicable jurisdictions. (4-9-09)

h. Criminal History Check Result. Information resulting from processing fingerprints through the databases maintained by the Bureau of Criminal Identification (BCI), Federal Bureau of Investigation (FBI) and the Idaho Statewide Sex Offender Registry. (4-9-09)

i. Irregular Contact. Contact that is not on a daily or weekly basis, or has a regular scheduled interaction with students. (4-9-09)

j. Multiple Assignments. When an individual works in two or more LEAs or an LEA and private school simultaneously. (4-9-09)

k. Non-Certificated Employee. An individual employed in a non-certificated position. (4-9-09)

l. Open Date. The date a fingerprint card or scan is entered into the database as an electronic file. (4-9-09)

m. Rejected Fingerprint Cards. A fingerprint card that has been returned by the BCI, FBI or SDE for poor quality prints, lack of signature, card being older than sic (6) months, or other incomplete information. (4-9-09)

n. Scan. The process of capturing an individual's fingerprints by an electronic process. (4-9-09)

o. Unsupervised Contact. Direct contact or interaction with students not under the direct supervision of a school district employee on a continuing basis in a K-12 setting. This includes contact or interaction with students in scheduled school activities that occur outside of the school or outside of normal school hours. This excludes extra-curricular trips of one-day length starting during the school day. (4-9-09)

02. Fee. The SDE shall charge a forty dollars ($40) fee for undergoing a criminal history check. (4-9-09)

03. Rejected Fingerprint Cards or Scans. (4-9-09)

a. When a fingerprint card has been rejected a new completed fingerprint card is required. (4-9-09)

b. The rejected fingerprint card will be sent back to the originating LEA, private or parochial school, contractors, postsecondary program, or individual. (4-9-09)

c. A new fingerprint card must be completed by a law enforcement agency to ensure legible fingerprints. Both the rejected fingerprint card and the new fingerprint card must be returned to the SDE within twenty (20) calendar days. (4-9-09)

d. If the new fingerprint card and rejected fingerprint card are returned after the twenty (20) calendar day time period a forty dollar ($40) fee is required to be paid. (4-9-09)

04. Secured CHC Website. The SDE will maintain a CHC website listing the CHC results. The LEA, private or parochial school, contractor or postsecondary program may view the results or status of an applicant, employee or candidate. (4-9-09)

a. Upon a signed agreement the SDE will issue a password to access the CHC website. (4-9-09)

b. Each LEA, private or parochial school, contractor and postsecondary program will have access to the CHC secure site listing their employees, statewide substitute teacher list, newly certified list and student teacher list. (4-9-09)

05. Fingerprinting & Criminal History Checks. (4-9-09)

a. The SDE will maintain a list of newly certificated educators. Educators stay on this list for one (1) year from their individual open date. Educators on this list may be employed by a LEA without a new CHC. (4-9-09)

b. The SDE will make the final determination if an applicant is eligible for Idaho certification.

(4-9-09)

c. If the SDE makes a determination that the applicant is not eligible for Idaho certification, the SDE may deny the applicant Idaho certification. Upon receiving the written denial the applicant may request a hearing pursuant to Section 33-1209, Idaho Code. (4-9-09)

06. Non-Certificated Employees. Non-certificated employees are required to complete a CHC pursuant to Section 33-130, Idaho Code. The CHC results will be posted on the CHC website for their employer to review. (4-9-09)

07. Substitute Teachers. Substitute teachers as defined in Section 33-512(15), Idaho Code, must undergo a criminal history check. The SDE shall maintain a statewide substitute teacher list. To remain on the list on the list a substitute teacher shall undergo a criminal history check every five (5) years in accordance with Section 33-512, Idaho Code. Substitute teachers on the list do not need to complete a multiple assignment form nor are subject to break in service provisions. (4-9-09)

08. Break In Service. (4-9-09)

a. When an employee returns to any LEA after a break in service a new criminal history check must be completed. (4-9-09)

b. When an employee changes employment between LEAs a new CHC must be completed regardless of the most recent CHC. (4-9-09)

09. Postsecondary. (4-9-09)

a. The postsecondary program will submit a completed fingerprint card or scan for all candidates who are applying for student teaching, internships or practicum. (4-9-09)

b. The SDE will make a preliminary determination based on the CHC result if the candidate is eligible for certification in Idaho. This decision will be forwarded to the postsecondary program concerning the eligibility of their candidate. (4-9-09)

c. The SDE will move a candidate from the student teacher list to the newly certified list when an application for certification is approved. (4-9-09)

076. CODE OF ETHICS FOR IDAHO PROFESSIONAL EDUCATORS (SECTIONS 33-1208 AND 33-1209, IDAHO CODE).

Believing in the worth and dignity of each human being, the professional educator recognizes the supreme importance of pursuing truth, striving toward excellence, nurturing democratic citizenship and safeguarding the freedom to learn and to teach while guaranteeing equal educational opportunity for all. The professional educator accepts the responsibility to practice the profession according to the highest ethical principles. The Code of Ethics for Idaho Professional Educators symbolizes the commitment of all Idaho educators and provides principles by which to judge conduct. (3-20-04)

01. Aspirations and Commitments. (3-20-04)

a. The professional educator aspires to stimulate the spirit of inquiry in students and to provide opportunities in the school setting that will help them acquire viable knowledge, skills, and understanding that will meet their needs now and in the future. (3-20-04)

b. The professional educator provides an environment that is safe to the cognitive, physical and psychological well-being of students and provides opportunities for each student to move toward the realization of his goals and potential as an effective citizen. (3-20-14)

c. The professional educator, recognizing that students need role models, will act, speak and teach in such a manner as to exemplify nondiscriminatory behavior and encourage respect for other cultures and beliefs. (3-20-14)

d. The professional educator is committed to the public good and will help preserve and promote the principles of democracy. He will provide input to the local school board to assist in the board's mission of developing and implementing sound educational policy, while promoting a climate in which the exercise of professional judgment is encouraged. (4-11-06)

e. The professional educator believes the quality of services rendered by the education profession directly influences the nation and its citizens. He strives, therefore, to establish and maintain the highest set of professional principles of behavior, to improve educational practice, and to achieve conditions that attract highly qualified persons to the profession. (4-11-06)

f. The professional educator regards the employment agreement as a pledge to be executed in a manner consistent with the highest ideals of professional service. He believes that sound professional personal relationships with colleagues, governing boards, and community members are built upon integrity, dignity, and mutual respect. The professional educator encourages the practice of the profession only by qualified persons. (4-11-06)

02. **Principle I - Professional Conduct**. A professional educator abides by all federal, state, and local education laws and statutes. Unethical conduct shall include the conviction of any felony or misdemeanor offense set forth in Section 33-1208, Idaho Code. (3-20-14)

03. **Principle II - Educator/Student Relationship**. A professional educator maintains a professional relationship with all students, both inside and outside the physical and virtual classroom. Unethical conduct includes, but is not limited to: (3-20-14)

a. Committing any act of child abuse, including physical or emotional abuse; (3-20-04)

b. Committing any act of cruelty to children or any act of child endangerment; (3-20-04)

c. Committing or soliciting any sexual act from any minor or any student regardless of age; (3-20-04)

d. Committing any act of harassment as defined by district policy; (4-11-06)

e. Soliciting, encouraging, or consummating a romantic or inappropriate relationship (whether written, verbal, virtual, or physical) with a student, regardless of age; (3-20-14)

f. Using inappropriate language including, but not limited to, swearing and improper sexual comments (e.g., sexual innuendoes or sexual idiomatic phrases); (3-20-04)

g. Taking or possessing images (digital, photographic, or video) of students of a harassing, confidential, or sexual nature; (4-11-15)

h. Inappropriate contact with any minor or any student regardless of age using electronic media; (4-11-06)

i. Furnishing alcohol or illegal or unauthorized drugs to any student or allowing or encouraging a student to consume alcohol or unauthorized drugs except in a medical emergency; (3-20-14)

j. Conduct that is detrimental to the health or welfare of students; and (3-20-14)

k. Deliberately falsifying information presented to students. (3-20-14)

04. Principle III - Alcohol and Drugs Use or Possession. A professional educator refrains from the abuse of alcohol or drugs during the course of professional practice. Unethical conduct includes, but is not limited to: (3-20-14)

a. Being on school premises or at any school-sponsored activity, home or away, involving students while possessing, using, or consuming illegal or unauthorized drugs; (3-20-04)

b. Being on school premises or at any school-sponsored activity, home or away, involving students while possessing, using, or consuming alcohol; (3-20-04)

c. Inappropriate or illegal use of prescription medications on school premises or at any school-sponsored events, home or away; (4-11-06)

d. Inappropriate or illegal use of drugs or alcohol that impairs the individual's ability to function; and (4-11-06)

e. Possession of an illegal drug as defined in Chapter 27, Idaho Code, Uniform Controlled Substances. (3-20-04)

05. Principle IV - Professional Integrity. A professional educator exemplifies honesty and integrity in the course of professional practice. Unethical conduct includes, but is not limited to: (3-20-14)

a. Fraudulently altering or preparing materials for licensure or employment; (3-20-04)

b. Falsifying or deliberately misrepresenting professional qualifications, degrees, academic awards, and related employment history when applying for employment or licensure; (3-20-04)

c. Failure to notify the state at the time of application for licensure of past revocations or suspensions of a certificate or license from another state; (3-20-04)

d. Failure to notify the state at the time of application for licensure of past criminal convictions of any crime violating the statutes or rules governing teacher certification; (3-20-14)

e. Falsifying, deliberately misrepresenting, or deliberately omitting information regarding the evaluation of students or personnel, including improper administration of any standardized tests (changing test answers; copying or teaching identified test items; unauthorized reading of the test to students, etc.); (4-11-06)

f. Falsifying, deliberately misrepresenting, or deliberately omitting reasons for absences or leaves; (3-20-04)

g. Falsifying, deliberately misrepresenting, or deliberately omitting information submitted in the course of an official inquiry or investigation; (3-20-14)

h. Falsifying, deliberately misrepresenting, or deliberately omitting material information on an official evaluation of colleagues; and (3-20-14)

i. Failure to notify the state of any criminal conviction of a crime violating the statutes and/or rules governing teacher certification. (3-20-14)

06. Principle V - Funds and Property. A professional educator entrusted with public funds and property honors that trust with a high level of honesty, accuracy, and responsibility. Unethical conduct includes, but is not limited to: (3-20-14)

a. Misuse, or unauthorized use, of public or school-related funds or property; (3-20-04)

b. Failure to account for school funds collected from students, parents, or patrons; (3-20-14)

c. Submission of fraudulent requests for reimbursement of expenses or for pay; (3-20-04)

d. Co-mingling of public or school-related funds in personal bank account(s); (3-20-04)

e. Use of school property for private financial gain; (3-20-14)

f. Use of school computers to deliberately view or print pornography; and, (3-20-04)

g. Deliberate use of poor budgeting or accounting practices. (3-20-04)

07. **Principle VI - Compensation**. A professional educator maintains integrity with students, colleagues, parents, patrons, or business personnel when accepting gifts, gratuities, favors, and additional compensation. Unethical conduct includes, but is not limited to: (3-20-14)

a. Unauthorized solicitation of students or parents of students to purchase equipment, supplies, or services from the educator who will directly benefit; (3-20-14)

b. Acceptance of gifts from vendors or potential vendors for personal use or gain where there may be the appearance of a conflict of interest; (3-20-04)

c. Tutoring students assigned to the educator for remuneration unless approved by the local board of education; and, (3-20-04)

d. Soliciting, accepting, or receiving a financial benefit greater than fifty dollars ($50) as defined in Section 18-1359(b), Idaho Code. (3-20-14)

08. **Principle VII - Confidentiality**. A professional educator complies with state and federal laws and local school board policies relating to the confidentiality of student and employee records, unless disclosure is required or permitted by law. Unethical conduct includes, but is not limited to: (3-20-14)

a. Sharing of confidential information concerning student academic and disciplinary records, personal confidences, health and medical information, family status or income, and assessment or testing results with inappropriate individuals or entities; and (3-20-04)

b. Sharing of confidential information about colleagues obtained through employment practices with inappropriate individuals or entities. (3-20-04)

09. **Principle VIII - Breach of Contract or Abandonment of Employment**. A professional educator fulfills all terms and obligations detailed in the contract with the local board of education or education agency for the duration of the contract. Unethical conduct includes, but is not limited to: (3-20-14)

a. Abandoning any contract for professional services without the prior written release from the contract by the employing school district or agency; (3-20-04)

b. Willfully refusing to perform the services required by a contract; and, (3-20-04)

c. Abandonment of classroom or failure to provide appropriate supervision of students at school or school-sponsored activities to ensure the safety and well-being of students. (3-20-04)

10. Principle IX - Duty to Report. A professional educator reports breaches of the Code of Ethics for Idaho Professional Educators and submits reports as required by Idaho Code. Unethical conduct includes, but is not limited to: (3-20-14)

a. Failure to comply with Section 33-1208A, Idaho Code, (reporting requirements and immunity); (3-20-04)

b. Failure to comply with Section 16-1605, Idaho Code, (reporting of child abuse, abandonment or neglect); (4-11-06)

c. Failure to comply with Section 33-512B, Idaho Code, (suicidal tendencies and duty to warn); and (4-11-06)

d. Having knowledge of a violation of the Code of Ethics for Idaho Professional Educators and failing to report the violation to an appropriate education official. (3-20-04)

11. Principle X - Professionalism. A professional educator ensures just and equitable treatment for all members of the profession in the exercise of academic freedom, professional rights and responsibilities while following generally recognized professional principles. Unethical conduct includes, but is not limited to: (3-20-14)

a. Any conduct that seriously impairs the Certificate holder's ability to teach or perform his professional duties; (3-20-04)

b. Committing any act of harassment toward a colleague; (4-11-06)

c. Failure to cooperate with the Professional Standards Commission in inquiries, investigations, or hearings; (3-20-04)

d. Using institutional privileges for the promotion of political candidates or for political activities, except for local, state or national education association elections; (4-11-06)

e. Willfully interfering with the free participation of colleagues in professional associations; and (4-11-06)

f. Taking or possessing images (digital, photographic or video) of colleagues of a harassing, confidential, or sexual nature. (4-11-15)

077. DEFINITIONS FOR USE WITH THE CODE OF ETHICS FOR IDAHO PROFESSIONAL EDUCATORS (SECTIONS 33-1208 AND 33-1209, IDAHO CODE).

01. Administrative Complaint. A document issued by the State Department of Education outlining the specific, purported violations of Section 33-1208, Idaho Code, or the Code of Ethics for Idaho Professional Educators. (3-20-04)

02. Allegation. A purported violation of the Code of Ethics for Idaho Professional Educators or Idaho Code. (3-20-04)

03. Certificate. A document issued by the Department of Education under the authority of the State Board of Education allowing a person to serve in any elementary or secondary school in the capacity of teacher, supervisor, administrator, education specialist, school nurse or school librarian (Section 33-1201, Idaho Code). (3-20-04)

04. Certificate Denial. The refusal of the state to grant a certificate for an initial or reinstatement application. (3-20-04)

05. Certificate Suspension. A time-certain invalidation of any Idaho certificate as determined by a stipulated agreement or a due process hearing panel as set forth in Section 33-1209, Idaho Code. (3-20-04)

06. Complaint. A signed document defining the allegation that states the specific ground or grounds for revocation, suspension, denial, place reasonable conditions on a certificate or issuance of a letter of reprimand (Section 33-1209(1), Idaho Code). The State Department of Education may initiate a complaint. (4-11-06)

07. Conditional Certificate. Allows an educator to retain licensure under certain stated Certificate conditions as determined by the Professional Standards Commission (Section 33-1209(10), Idaho Code). (3-20-04)

08. Contract. Any signed agreement between the school district and a certificated educator pursuant to Section 33-513(1), Idaho Code. (3-20-04)

09. Conviction. Refers to all instances regarding a finding of guilt by a judge or jury; a plea of guilt by Nolo Contendere or Alford plea; or all proceedings in which a sentence has been suspended, deferred or withheld. (3-20-04)

10. Educator. A person who holds or applies for an Idaho Certificate (Section 33-1001(16) and Section 33-1201, Idaho Code). (3-20-04)

11. Education Official. An individual identified by local school board policy, including, but not limited to, a superintendent, principal, assistant principal, or school resource officer (SRO). (3-20-04)

12. Executive Committee. A decision-making body comprised of members of the Professional Standards Commission, including the chair and/or vice-chair of the Commission. A prime duty of the Committee is to review purported violations of the Code of Ethics for Idaho Professional Educators to determine probable cause and direction for possible action to be taken against a Certificate holder. (3-20-14)

13. Hearing. A formal review proceeding that ensures the respondent due process. The request for a hearing is initiated by the respondent and is conducted by a panel of peers. (3-20-04)

14. Hearing Panel. A minimum of three (3) educators appointed by the chair of the Professional Standards Commission and charged with the responsibility to make a final determination regarding the charges specifically defined in the Administrative Complaint. (3-20-04)

15. Investigation. The process of gathering factual information concerning a valid, written complaint in preparation for review by the Professional Standards Commission Executive Committee, or following review by the Executive Committee at the request of the deputy attorney general assigned to the Department of Education. (3-20-14)

16. Minor. Any individual who is under eighteen (18) years of age. (3-20-04)

17. Not-Sufficient Grounds. A determination by the Executive Committee that there is not-sufficient evidence to take action against an educator's certificate. (3-20-14)

18. Principles. Guiding behaviors that reflect what is expected of professional educators in the state of Idaho while performing duties as educators in both the private and public sectors. (3-20-04)

19. Reprimand. A written letter admonishing the Certificate holder for his conduct. The reprimand cautions that further unethical conduct may lead to consideration of a more severe action against the holder's Certificate. (3-20-04)

20. Respondent. The legal term for the professional educator who is under investigation for a purported violation of the Code of Ethics for Idaho Professional Educators. (3-20-04)

21. **Revocation**. The invalidation of any Certificate held by the educator. (3-20-04)

22. **Stipulated Agreement**. A written agreement between the respondent and the Professional Standards Commission to resolve matters arising from an allegation of unethical conduct following a complaint or an investigation. The stipulated agreement is binding to both parties and is enforceable under its own terms, or by subsequent action by the Professional Standards Commission. (3-20-04)

23. **Student**. Any individual enrolled in any Idaho public or private school from preschool through grade 12. (3-20-04)

24. **Sufficient Grounds**. A determination by the Executive Committee that sufficient evidence exists to issue an Administrative Complaint. (3-20-04)

078. -- 099. (RESERVED)

100. OFFICIAL VEHICLE FOR APPROVING TEACHER EDUCATION PROGRAMS.
(Section 33-114, Idaho Code) (4-1-97)

01. **The Official Vehicle for the Approval of Teacher Education Programs**. The official vehicle for the approval of teacher education programs is the Council for the Accreditation of Educator Preparation (CAEP) and the approved Idaho Standards for the Initial Certification of Professional School Personnel. The Idaho Standards are based upon the accepted national standards for educator preparation and include state-specific, core teaching requirements. The State Department of Education will transmit to the head of each Idaho college or department of education a copy of all revisions to the Idaho Standards for the Initial Certification of Professional School Personnel. Such revisions will take effect and must be implemented within a period not to exceed two (2) years after notification of such revision. (3-25-16)

02. **Non-Traditional Teacher Preparation Program**. The State Board of Education must approve all non-traditional route to teacher certification programs. The programs must include, at a minimum, the following components: (3-25-16)

a. Pre-assessment of teaching and content knowledge; (3-25-16)

b. An academic advisor with knowledge of the prescribed instruction area; (3-25-16)

c. Exams of pedagogy and content knowledge; and (3-25-16)

d. Be aligned to the Idaho Standards for the Initial Certification of Professional School Personnel. (3-25-16)

03. **Reference Availability**. The Idaho Standards for the Initial Certification of Professional School Personnel, incorporated by reference in Subsection 004.01, are available for inspection on the Office of the State Board of Education's website at www.boardofed.idaho.gov. (3-29-12)

04. **Continuing Approval**. (3-29-12)

a. The state of Idaho will follow the Council for Accreditation of Educator Preparation (CAEP) model by which institutions shall pursue continuing approval through a full program review every seven (7) years. The full program review shall be based upon the Idaho Standards for Initial Certification of Professional School Personnel. (3-25-16)

b. The state of Idaho will additionally conduct focused reviews of state-specific, core teaching requirements in the interim, not to exceed every third year following the full program review. (3-29-12)

c. All approved non-traditional teacher preparation programs will be reviewed for continued approval on the same schedule as traditional teacher preparation programs. Reviews will include determination of continued alignment with the approved Idaho Standards for the Initial Certification of Professional School Personnel and effectiveness of program completers. (3-25-16)

05. Payment Responsibilities for Teacher Preparation Program Reviews. The Professional Standards Commission is responsible for Idaho teacher preparation program reviews, including assigning responsibility for paying for program reviews. To implement the reviews, it is necessary that: (4-6-05)

a. The Professional Standards Commission pay for all state review team expenses for on-site teacher preparation reviews from its budget. (3-25-16)

b. Requesting institutions pay for all other expenses related to on-site teacher preparation program reviews, including the standards review. (3-25-16)

101. -- 109. (RESERVED)

110. PERSONNEL STANDARDS.

The State Board of Education supports the efforts made by the Idaho Legislature to lower class size. Significant progress has been made in grades one through three (1-3). The State Board of Education believes that class sizes in grades four through six (4-6) are too high. Districts are encouraged to lower all class sizes as funds become available. Each district will develop personnel policies and procedures to implement the educational program of the district. The policies and procedures will address representation in each of the following personnel areas, as appropriate to student enrollment and the needs of each attendance area. Districts should strive to achieve ratios consistent with state class size ratio goals.

TEACHERS	STATE GOALS
Kindergarten	20
Grades 1, 2, 3	20
Grades 4, 5, 6	26
Middle School/Jr. High	160 teacher load
High School	160 teacher load
Alternative School (7-12)	18 average daily class load

INSTRUCTIONAL PERSONNEL

Schools are encouraged to explore technological options that provide for credible alternative delivery systems. Present and emerging information transmission technology may provide for greater teacher/pupil class size ratios.

PUPIL PERSONNEL	
(Certificated School Counselors, Social Workers, Psychologists)	400:1 * student/district average

Secondary Media Generalist and Assistants	500:1 * student/district average
Elementary Media Generalist or Assistants	500:1 * student/district average
Building Administrative Personnel	Not to exceed 500:1 * district average

* The stated pupil to personnel ratio is the goal; each school district will assign personnel as appropriate to student enrollment and the needs of each attendance area.

Classroom Assistants - State Goal: will be provided where the student/teacher ratio is deemed excessive by the district or where other student special needs exist (e.g., limited English proficiency or special education).

Classified Personnel - State Goal: will be employed in each building to support the needs of the staff, students, and community. (4-1-97)

111. BULLYING, HARASSMENT AND INTIMIDATION PREVENTION AND RESPONSE.

01. Dissemination of Information. School districts and charter schools shall make reasonable efforts to ensure that information on harassment, intimidation and bullying of students is disseminated annually to all school personnel, parents and students. (2-18-16)T

02. Professional Development. The content of ongoing professional development for school staff related to bullying, harassment and intimidation shall include: (2-18-16)T

a. School philosophy regarding school climate and student behavior expectations; (2-18-16)T

b. Definitions of bullying, harassment, and intimidation; (2-18-16)T

c. School prevention strategies or programs including the identification of materials to be distributed annually to students and parents; (2-18-16)T

d. Expectations of staff intervention for bullying, harassment, and intimidation; (2-18-16)T

e. School process for responding to bullying, harassment, and intimidation including the reporting process for students and staff, investigation protocol, the involvement of law enforcement, related student support services and parental involvement; and (2-18-16)T

f. Other topics as determined appropriate by the school district or charter school. (2-18-16)T

03. Graduated Consequences. Graduated consequences for a student who commits acts of bullying, harassment, and intimidation shall include a series of measures proportional to the act(s) committed and appropriate to the severity of the violation as determined by the school board of trustees, school administrators, or designated personnel depending upon the level of discipline. Graduated consequences should be in accordance with the nature of the behavior, the developmental age of the student, and the student’s history of problem behaviors and performance. (2-18-16)T

a. Graduated consequences may include, but are not limited to: (2-18-16)T

i. Meeting with the school counselor; (2-18-16)T

ii. Meeting with the school principal and student's parents or guardian; (2-18-16)T

iii. Detention, suspension or special programs; and (2-18-16)T

iv. Expulsion. (2-18-16)T

b. The graduated consequences are not intended to prevent or prohibit the referral of a student who commits acts of harassment, intimidation or bullying to available outside counseling services, and/or to law enforcement pursuant to Section 18-917A, Idaho Code. (2-18-16)T

c. Students with disabilities may be afforded additional protections under the Individuals with Disabilities Education Act (IDEA) and Section 504 of the Rehabilitation Act; school districts and charter schools shall comply with applicable state and federal law when disciplining students with individualized education programs (IEPs) or 504 plans for committing acts of bullying, harassment, and intimidation. (2-18-16)T

04. Intervention. School district and charter school employees are authorized and expected to intervene or facilitate intervention on behalf of students facing harassment, intimidation, and bullying. Intervention shall be reasonably calculated to: (2-18-16)T

a. Correct the problem behavior; (2-18-16)T

b. Prevent another occurrence of the problem; (2-18-16)T

c. Protect and provide support for the victim of the act; and (2-18-16)T

d. Take corrective action for documented systemic problems related to harassment, intimidation, or bullying. (2-18-16)T

05. Reporting. Annual reporting will occur at the end of the school year through an aggregate report identifying the total number of bullying incidents by school districts and charter schools, grade level, gender, and repeat offenders. The State Department of Education shall provide school districts and charter schools with the guidelines and forms for reporting. (2-18-16)T

112. -- 119. (RESERVED)

120. LOCAL DISTRICT EVALUATION POLICY -- TEACHER AND PUPIL PERSONNEL CERTIFICATE HOLDERS.

Each school district board of trustees will develop and adopt policies for teacher performance evaluation using multiple measures in which criteria and procedures for the evaluation of certificated personnel are research based and aligned to Charlotte Danielson 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, teachers, and parents. The evaluation policy will be a matter of public record and communicated to the certificated personnel for whom it is written. (3-20-14)

01. Standards. Each district evaluation model shall be aligned to state minimum standards that are based on Charlotte Danielson's Framework for Teaching Second Edition domains and components of instruction. Those domains and components include: (3-29-10)

a. Domain 1 - Planning and Preparation: (3-29-10)

i. Demonstrating Knowledge of Content and Pedagogy; (3-29-10)

ii. Demonstrating Knowledge of Students; (3-29-10)

iii. Setting Instructional Outcomes; (3-20-14)

iv. Demonstrating Knowledge of Resources; (3-29-10)

v. Designing Coherent Instruction; and (3-29-10)

vi. Designing Student Assessments. (3-29-12)

b. Domain 2 - The Classroom Environment: (3-29-12)

i. Creating an Environment of Respect and Rapport; (3-29-10)

ii. Establishing a Culture for Learning; (3-29-10)

iii. Managing Classroom Procedures; (3-29-10)

iv. Managing Student Behavior; and (3-29-10)

v. Organizing Physical Space. (3-29-10)

c. Domain 3 - Instruction and Use of Assessment: (3-29-10)

i. Communicating with Students; (3-29-12)

ii. Using Questioning and Discussion Techniques; (3-29-10)

iii. Engaging Students in Learning; (3-29-10)

iv. Using Assessment in Instruction; and (3-29-12)

v. Demonstrating Flexibility and Responsiveness. (3-29-12)

d. Domain 4 - Professional Responsibilities: (3-29-10)

i. Reflecting on Teaching; (3-29-10)

ii. Maintaining Accurate Records; (3-29-10)

iii. Communicating with Families; (3-29-10)

iv. Participating in a Professional Community; (3-29-12)

v. Growing and Developing Professionally; and (3-29-10)

vi. Showing Professionalism. (3-29-10)

02. Professional Practice. For evaluations conducted on or after July 1, 2013, all certificated instructional employees must receive an evaluation in which at least sixty-seven percent (67%) of the evaluation results are based on Professional Practice. All measures included within the Professional Practice portion of the evaluation must be aligned to the Charlotte Danielson Framework for Teaching Second Edition. The measures included within the Professional Practice portion of the evaluation shall include a minimum of two (2) documented observations annually, with at least one (1) observation being completed by January 1 of each year. In situations where certificated personnel are unavailable for two (2) documented classroom observations, due to situations such as long-term illness, late year hire, etc., one (1) documented classroom observation is acceptable. District evaluation models shall also include at least one (1) of the following as a measure to inform the Professional Practice portion of all certificated instructional employee evaluations: (4-11-15

a. Parent/guardian input; (3-20-14)

b. Student input; and/or (3-20-14)

c. Portfolios. (3-20-14)

03. Student Achievement. ~~For evaluations conducted on or after July 1, 2013, all certificated instructional employees, principals and superintendents must receive an evaluation in which at least thirty-three percent (33%) of the evaluation results are based on multiple objective measures of growth in student achievement as determined by the board of trustees and based upon research. For evaluations conducted on or after July 1, 2014,~~ Instructional staff evaluation results must include ~~growth in~~measurable student achievement, as defined in Section 33-1001, Idaho Code, ~~as measured by Idaho's statewide assessment for Federal accountability purposes must be included~~as applicable to the subjects and grade ranges taught by the instructional staff. All other certificated staff evaluations must include measurable student achievement or student success indicators, as defined in Section 33-1001, Idaho Code, as applicable to the position. This portion of the evaluation may be calculated using current and/or past year's data and may use one (1) or multiple years of data. Growth in student achievement may be considered as an optional measure for all other school based and district based staff, as determined by the local board of trustees. (3-20-14)

04. Participants. Each district evaluation policy will include provisions for evaluating all certificated employees identified in Section 33-1001, Idaho Code, Subsection 16. Evaluations shall be differentiated for certificated non-instructional employees and pupil personnel certificate holders in a way that aligns with the Charlotte Danielson Framework for Teaching Second Edition to the extent possible. Policies for evaluating certificated employees should identify the differences, if any, in the conduct of evaluations for nonrenewable contract personnel and renewable contract personnel. (3-20-14)

05. Evaluation Policy - Content. Local school district policies will include, at a minimum, the following information: (4-1-97)

a. Purpose -- statements that identify the purpose or purposes for which the evaluation is being conducted; e.g., individual instructional improvement, personnel decisions. (4-1-97)

b. Evaluation criteria -- statements of the general criteria upon which certificated personnel will be evaluated. (4-1-97)

c. Evaluator -- identification of the individuals responsible for appraising or evaluating certificated instructional staff and pupil personnel performance. The individuals assigned this responsibility shall have received training in evaluation and prior to September 1, 2018, shall demonstrate proof of proficiency in conducting observations and evaluating effective teacher performance by passing a proficiency assessment approved by the State Department of Education as a onetime recertification requirement. (3-20-14)

d. Sources of data -- description of the sources of data used in conducting certificated personnel evaluations. For certificated instructional staff, a minimum of two (2) documented classroom observations shall be included as one (1) source of data. At least one (1) of those observations must be completed prior to January 1 of each year. In situations where certificated personnel are unavailable for two (2) documented classroom observations, due to situations such as long-term illness, late year hire, etc., one (1) documented classroom observation is acceptable. Parent/guardian input, student input and/or portfolios shall be considered as sources of data to support professional practice. (4-11-15)

e. Procedure -- description of the procedure used in the conduct of certificated personnel evaluations. (4-1-97)

f. Communication of results -- the method by which certificated personnel are informed of the results of evaluation. (4-1-97)

g. Personnel actions -- the action available to the school district as a result of the evaluation and the procedures for implementing these actions; e.g., job status change. Note: in the event the action taken as a result of evaluation is to not renew an individual's contract or to renew an individual's contract at a reduced rate, school districts should take proper steps to follow the procedures outlined in Sections 33-513 through 33-515, Idaho Code in order to assure the due process rights of all personnel. (3-20-14)

h. Appeal -- the procedure available to the individual for appeal or rebuttal when disagreement exists regarding the results of certificated personnel evaluations. (4-1-97)

i. Remediation -- the procedure available to provide remediation in those instances where remediation is determined to be an appropriate course of action. (4-1-97)

j. Monitoring and evaluation. -- A description of the method used to monitor and evaluate the district's personnel evaluation system. (4-1-97)

k. Professional development and training -- a plan for ongoing training for evaluators/administrators and teachers on the districts evaluation standards, tool and process. (3-29-10)

l. Funding -- a plan for funding ongoing training and professional development for administrators in evaluation. (3-29-10)

m. Collecting and using data -- a plan for collecting and using data gathered from the evaluation tool that will be used to inform professional development. Aggregate data shall be considered as part of the district and individual schools Needs Assessment in determining professional development offerings. (3-20-14)

n. Individualizing teacher evaluation rating system -- a plan for how evaluations will be used to identify proficiency and record growth over time. No later than July 1, 2013, districts shall have established an individualized teacher evaluation rating system with a minimum of three (3) rankings used to differentiate performance of teachers and pupil personnel certificate holders including: (3-20-14)

i. Unsatisfactory being equal to "1"; (3-20-14)

ii. Basic being equal to "2"; and (3-20-14)

iii. Proficient being equal to "3". (3-20-14)

o. A plan for including all stakeholders including, but not limited to, teachers, board members, administrators, and parents in the development and ongoing review of their teacher evaluation plan. (3-20-14)

06. Evaluation Policy - Frequency of Evaluation. The evaluation policy shall include a provision for evaluating all certificated personnel on a fair and consistent basis. (3-20-14)

07. Evaluation Policy - Personnel Records. Permanent records of each certificated personnel evaluation will be maintained in the employee's personnel file. All evaluation records will be kept confidential within the parameters identified in federal and state regulations regarding the right to privacy (Section 33-518, Idaho Code). Local school districts shall report the rankings of individual certificated personnel evaluations to the State Department of Education annually for State and Federal reporting purposes. The State Department of Education shall ensure that the privacy of all certificated personnel is protected by not releasing statistical data of evaluation rankings in local school districts with fewer than five (5) teachers and by only reporting that information in the aggregate by local school district. (3-20-14)

08. Evaluation System Approval. Each school district board of trustees will develop and adopt policies for teacher and pupil personnel certificated performance evaluation in which criteria and procedures for the evaluation are research based and aligned with the Charlotte Danielson Framework for Teaching Second Edition. By July 1, 2014, an evaluation plan which incorporates all of the above elements shall be submitted to the State Department of Education for approval. Once approved, subsequent changes made in the evaluation system shall be resubmitted for approval. (3-20-14)

121. LOCAL DISTRICT EVALUATION POLICY - SCHOOL PRINCIPAL.

For principal evaluations conducted on or after July 1, 2014, each school district board of trustees will develop and adopt policies for principal performance evaluation using multiple measures in which criteria and procedures for the evaluation of administratively certificated personnel serving as school principal are research based and aligned to the standards and requirements outlined in Subsections 121.01 through 121.07 of this rule. Districts must, at a minimum, pilot such an evaluation during the 2013-2014 school year and report the results of that pilot to the State Department of Education no later than July 1, 2014, in a format determined by the Department. The process of developing criteria and procedures for principal evaluation will allow opportunities for input from those affected by the evaluation; i.e., trustees, administrators, teachers and parents. The evaluation policy will be a matter of public record and communicated to the principal for whom it is written. (3-20-14)

01. Standards. Each district principal evaluation model shall be aligned to state minimum standards based on the Interstate School Leaders Licensure Consortium (ISLLC) standards and include proof of proficiency in conducting teacher evaluations using the state's adopted model, the Charlotte Danielson Framework for Teaching Second Edition. Proof of proficiency in evaluating teacher performance shall be required of all individuals assigned the responsibility for appraising, observing, or evaluating certificated personnel performance. Those responsible for measuring teacher performance are district leadership such as principals, assistant principals, special education directors, and superintendents. Proof of proficiency in evaluating performance shall be demonstrated by passing a proficiency assessment approved by the State Department of Education as a onetime recertification requirement prior to September 1, 2018. Principal evaluation standards shall additionally address the following domains and components: (4-11-15)

a. Domain 1: School Climate - An educational leader promotes the success of all students by advocating, nurturing and sustaining a school culture and instructional program conducive to student learning and staff professional development. An educational leader articulates and promotes high expectations for teaching and learning while responding to diverse community interest and needs. (3-20-14)

i. School Culture - Principal establishes a safe, collaborative, and supportive culture ensuring all students are successfully prepared to meet the requirements for tomorrow's careers and life endeavors. (3-20-14)

ii. Communication - Principal is proactive in communicating the vision and goals of the school or district, the plans for the future, and the successes and challenges to all stakeholders. (3-20-14)

iii. Advocacy - Principal advocates for education, the district and school, teachers, parents, and students that engenders school support and involvement. (3-20-14)

b. Domain 2: Collaborative Leadership - An educational leader promotes the success of all students by ensuring management of the organization, operations and resources for a safe, efficient and effective learning environment. In collaboration with others, uses appropriate data to establish rigorous, concrete goals in the context of student achievement and instructional programs. The educational leader uses research and/or best practices in improving the education program. (3-20-14)

i. Shared Leadership - Principal fosters shared leadership that takes advantage of individual expertise, strengths, and talents, and cultivates professional growth. (3-20-14)

ii. Priority Management - Principal organizes time and delegates responsibilities to balance administrative/managerial, educational, and community leadership priorities. (3-20-14)

iii. Transparency - Principal seeks input from stakeholders and takes all perspectives into consideration when making decisions. (3-20-14)

iv. Leadership Renewal - Principal strives to continuously improve leadership skills through, professional development, self-reflection, and utilization of input from others. (3-20-14)

v. Accountability - Principal establishes high standards for professional, legal, ethical, and fiscal accountability for self and others. (3-20-14)

c. Domain 3: Instructional Leadership - An educational leader promotes the success of all students by facilitating the development, articulation, implementation, and stewardship of a vision of learning that is shared and supported by the school community. The educational leader provides leadership for major initiatives and change efforts and uses research and/or best practices in improving the education program. (3-20-14)

i. Innovation - Principal seeks and implements innovative and effective solutions that comply with general and special education law. (3-20-14)

ii. Instructional Vision - Principal insures that instruction is guided by a shared, research-based instructional vision that articulates what students do to effectively learn. (3-20-14)

iii. High Expectations - Principal sets high expectation for all students academically, behaviorally, and in all aspects of student well-being. (3-20-14)

iv. Continuous Improvement of Instruction - Principal has proof of proficiency in assessing teacher performance based upon the Charlotte Danielson Framework for Teaching Second Edition. Aligns resources, policies, and procedures toward continuous improvement of instructional practice guided by the instructional vision. (3-20-14)

v. Evaluation - Principal uses teacher/principal evaluation and other formative feedback mechanisms to continuously improve teacher/principal effectiveness. (3-20-14)

vi. Recruitment and Retention -Principal recruits and maintains a high quality staff. (3-20-14)

02. Professional Practice. For evaluations conducted on or after July 1, 2014, all principals must receive an evaluation in which sixty-seven percent (67%) of the evaluation results are based on Professional Practice. All measures included within the Professional Practice portion of the evaluation must be aligned to the Domains and Components listed in Subsection 121.01.a. through 121.01.c. of this rule. As a measure to inform the Professional Practice portion of all principal evaluations, district evaluation models shall also include at least one (1) of the following: (3-20-14)

a. Parent/guardian input; (3-20-14)

b. Teacher input; (3-20-14)

c. Student input; and/or (3-20-14)

d. Portfolios. (3-20-14)

03. Student Achievement. For evaluations conducted on or after July 1, 2013, all certificated instructional employees, principals and superintendents must receive an evaluation in which at least thirty-three percent (33%) of the evaluation results are based on multiple objective measures of growth in student achievement as determined by the board of trustees and based upon research. For evaluations conducted on or after July 1, 2014, growth in student achievement as measured by Idaho's statewide assessment for Federal accountability purposes must be included. This portion of the evaluation may be calculated using current and/or past year's data and may use one (1) or multiple years of data. Growth in student achievement may be considered as an optional measure for all other school based and district based staff, as determined by the local board of trustees. (3-20-14)

04. Evaluation Policy - Content. For evaluations conducted on or after July 1, 2014, local school district policies will include, at a minimum, the following information: (3-20-14)

a. Purpose -- statements that identify the purpose or purposes for which the evaluation is being conducted; e.g., individual instructional leadership, personnel decisions. (3-20-14)

b. Evaluation criteria -- statements of the general criteria upon which principals be evaluated. (3-20-14)

c. Evaluator -- identification of the individuals responsible for appraising or evaluating principal performance. The individuals assigned this responsibility shall have received training in evaluation. (3-20-14)

d. Sources of data -- description of the sources of data used in conducting principal evaluations. Proficiency in conducting observations and evaluating effective teacher performance shall be included as one (1) source of data. (3-20-14)

e. Procedure -- description of the procedure used in the conduct of principal evaluations. (3-20-14)

f. Communication of results -- the method by which principals are informed of the results of evaluation. (3-20-14)

g. Personnel actions -- the action, available to the school district as a result of the evaluation, and the procedures for implementing these actions; e.g., job status change. (3-20-14)

h. Appeal -- the procedure available to the individual for appeal or rebuttal when disagreement exists regarding the results of an evaluations. (3-20-14)

i. Remediation -- the procedure available to provide remediation in those instances where remediation is determined to be an appropriate course of action. (3-20-14)

j. Monitoring and evaluation. -- A description of the method used to monitor and evaluate the district's principal evaluation system. (3-20-14)

k. Professional development and training -- a plan for ongoing training and professional learning based upon the district's evaluation standards and process. (3-20-14)

l. Funding -- a plan for funding ongoing training and professional development for evaluators of principals. (3-20-14)

m. Collecting and using data -- a plan for collecting and using data gathered from the evaluation tool that will be used to inform professional development for principals. (3-20-14)

n. Individualizing principal evaluation rating system -- a plan for how evaluations will be used to identify proficiency and record growth over time. No later than July 1, 2014, districts shall have established an individualized principal evaluation rating system with a minimum of three rankings used to differentiate performance of principals including: (3-20-14)

i. Unsatisfactory being equal to "1"; (3-20-14)

ii. Basic being equal to "2"; and (3-20-14)

iii. Proficient being equal to "3". (3-20-14)

o. A plan for including stakeholders including, but not limited to, teachers, board members, administrators, and parents in the development and ongoing review of their principal evaluation plan. (3-20-14)

05. Evaluation Policy - Frequency of Evaluation. The evaluation policy should include a provision for evaluating all principals on a fair and consistent basis. All principals shall be evaluated at least once annually no later than ~~May~~June 1 of each year. (3-20-14)

06. Evaluation Policy - Personnel Records. Permanent records of each principal evaluation will be maintained in the employee's personnel file. All evaluation records will be kept confidential within the parameters identified in federal and state regulations regarding the right to privacy (Section 33-518, Idaho Code). Local school districts shall report the rankings of individual certificated personnel evaluations to the State Department of Education annually for State and Federal reporting purposes. The State Department of Education shall ensure that the privacy of all certificated personnel is protected by not releasing statistical data of evaluation rankings in local school districts ~~with fewer than five (5) teachers and by only reporting that information in the aggregate by local school district.~~in accordance with the approved policies of the Idaho State Board of Education Data Management Council. (3-20-14)

07. Evaluation System Approval. Each school district board of trustees will develop and adopt policies for principal performance evaluation in which criteria and procedures for the evaluation are research based and aligned with state standards. By July 1, 2014, an evaluation plan which incorporates all of the above elements shall be submitted to the State Department of Education for approval. Once approved, subsequent changes made in the evaluation system shall be resubmitted for approval. (3-20-14)

122. -- 129. (RESERVED)

130. SCHOOL FACILITIES.
Each school facility consists of the site, buildings, equipment, services, and is a critical factor in carrying out educational programs. The focus of concern in each school facility is the provision of a variety of instructional activities and programs, with the health and safety of all persons essential. (4-1-97)

01. Buildings. All school buildings, including portable or temporary buildings, will be designed and built in conformance with the current edition of the codes specified in the Idaho Building Code Act, Section 39-4109, Idaho Code, including, the National Electrical Code, Uniform Plumbing Code, and Idaho General Safety and Health Standards. All school buildings, including portable or temporary buildings, will meet other more stringent requirements established in applicable local building codes. (3-16-04)

02. Inspection of Buildings. All school buildings, including portable or temporary buildings, will be inspected as provided in Section 39-4130, Idaho Code, for compliance with applicable codes. Following this inspection, the school district will, within twenty (20) days, (1) correct any deficiencies specified in the inspection report or (2), if the corrective action involves structural modification, file a written plan with the inspecting agency for correction by the beginning of the following school year. (4-1-97)

131. -- 139. (RESERVED)

140. ACCREDITATION.
All public secondary schools, serving any grade(s) 9-12, will be accredited. Accreditation is voluntary for elementary

schools, grades K-8, private and parochial schools, and alternative schools not identified in Subsection 140.01.a. through 140.01.e. of this rule. (Section 33- 119, Idaho Code) (3-20-14)

01. Alternative Schools. Beginning with the 2014-15 school year, an alternative school serving any grade(s) 9-12 that meets any three (3) of the criteria in Subsections 140.01.a. through 140.01.e. of this rule, shall be required to be accredited. An alternative school that does not meet three (3) of the following criteria in Subsections 140.01.a. through 140.01.e. shall be considered as an alternative program by the district board of trustees and shall be included in the accreditation process and reporting of another secondary school within the district for the purposes of meeting the intent of this rule. (3-20-14)

a. School has an Average Daily Attendance greater than or equal to 36 students based on previous years enrollment; (3-20-14)

b. School enrolls any students full-time for the school year once eligibility determination is made as opposed to schools that enroll students for "make-up" or short periods of time; (3-20-14)

c. School offers an instructional model that is different than that provided by the traditional high school within the district for a majority of the coursework, including but not limited to online/virtual curriculum; (3-20-14)

d. School administers diplomas that come from that alternative school as opposed to students receiving a diploma from the traditional high school within the school district; or (3-20-14)

e. School receives its own accountability rating for federal reporting purposes. (3-20-14)

02. Continuous School Improvement Plan. Schools will develop continuous school improvement plans focused on the improvement of student performance. (4-2-08)

03. Standards. Schools will meet the accreditation standards of the Northwest Accreditation Commission. (3-29-12)

04. Reporting. An annual accreditation report will be submitted to the State Board of Education. (4-2-08)

141. -- 149. (RESERVED)

150. TRANSPORTATION.
Minimum School Bus Construction Standards. All new school bus chassis and bodies must meet or exceed Standards for Idaho School Buses and Operations as incorporated in Section 004 of these rules and as authorized in Section 33-1511, Idaho Code. (5-8-09)

151. -- 159. (RESERVED)

160. MAINTENANCE STANDARDS AND INSPECTIONS.

01. Safety. School buses will be maintained in a safe operating condition at all times. Certain equipment or parts of a school bus that are critical to its safe operation must be maintained at prescribed standards. When routine maintenance checks reveal any unsafe condition identified in the Standards for Idaho School Buses and Operations as incorporated in Section 004 of these rules the school district will eliminate the deficiency before returning the vehicle to service. (5-8-09)

02. Annual Inspection. After completion of the annual school bus inspection, and if the school bus is approved for operation, an annual inspection sticker, indicating the year and month of inspection, will be placed in the lower, right-hand corner of the right side front windshield. The date indicated on the inspection sticker shall correlate to State Department of Education's annual school bus inspection certification report signed by pupil transportation maintenance personnel and countersigned by the district superintendent. (Section 33-1506, Idaho Code) (7-1-02)

03. Sixty-Day Inspections. At intervals of not more than sixty (60) calendar days, excluding documented out-of-use periods in excess of thirty (30) days, the board of trustees shall cause inspection to be made of each school bus operating under the authority of the board. Except that, no bus with a documented out-of-use period in excess of sixty (60) days shall be returned to service without first completing a documented sixty (60) day inspection. Annual inspections are considered dual purpose and also meet the sixty (60) day inspection requirement. (Section 33-1506, Idaho Code) (7-1-04)

04. Documentation of Inspection. All inspections will be documented in writing. Annual inspections must be documented in writing on the form provided by the State Department of Education. (4-1-97)

05. Unsafe Vehicle. When a bus has been removed from service during a State Department of Education inspection due to an unsafe condition, the district will notify the State Department of Education on the appropriate form before the bus can be returned to service. When a bus has been found to have deficiencies that are not life-threatening, it will be repaired within thirty (30) days and the State Department of Education notified on the appropriate form. If the deficiencies cannot be repaired within thirty (30) days, the bus must be removed from service until the deficiencies have been corrected or an extension granted. (7-1-02)

06. Withdraw from Service Authority. Subsequent to any federal, national, or state advisory with good cause given therefor, the district shall, under the direction of the State Department of Education, withdraw from service any bus determined to be deficient in any prescribed school bus construction standard intended to safeguard life or minimize injury. No bus withdrawn from service under the provisions of this section shall be returned to service or used to transport students unless the district submits to the State Department of Education a certification of compliance specific to the school bus construction standard in question. (Section 33-1506, Idaho Code) (7-1-04)

161. -- 169. (RESERVED)

170. SCHOOL BUS DRIVERS AND VEHICLE OPERATION.
All school districts and school bus drivers must meet or exceed the training, performance and operation requirements delineated in the Standards for Idaho School Buses and Operations as incorporated in Section 004 of these rules. (Section 33-1508; 33-1509, Idaho Code) (5-8-09)

171. -- 179. (RESERVED)

180. WRITTEN POLICY.
The board of trustees will establish and adopt a set of written policies governing the pupil transportation system. Each school district that provides activity bus transportation for pupils shall have comprehensive policies and guidelines regarding activity transportation. (7-1-02)

181. -- 189. (RESERVED)

190. PROGRAM OPERATIONS.
School district fiscal reporting requirements as well as reimbursable and non-reimbursable costs within the Pupil Transportation Support Program, including but not limited to administration, field and activity trips, safety busing, contracting for transportation services, leasing of district-owned buses, insurance, ineligible and non-public school students, ineligible vehicles, capital investments including the purchasing of school buses and equipment, program support and district waiver procedures shall be delineated in Standards for Idaho School Buses and Operations incorporated in Section 004 of these rules. (Section 33-1006, Idaho Code) (5-8-09)

191. -- 219. (RESERVED)

220. RELEASE TIME PROGRAM FOR ELEMENTARY AND SECONDARY SCHOOLS.
In the view of the State Board of Education, public elementary and secondary school programs that permit the practice of releasing students from school for the purpose of attending classes in religious education or for other purposes should observe certain practices that are in keeping with the present state of the law. These practices are designed to ensure that the public school operation is not adversely affected and that public funds and property are not used for sectarian religious instruction in a way which violates the United States Constitution, the Idaho State Constitution, or state law. These practices should include the following: (Section 33-519, Idaho Code) (4-1-97)

01. Scheduling. The local school board will have reasonable discretion over the scheduling and timing of the release program. Release time programs may not interfere with the scheduling of classes, activities and programs of the public schools. (4-1-97)

02. Voluntary Decision. The decision of a school district to permit release time programs for kindergarten through grade eight (K-8), as well as the decision of individual students to participate, must be purely voluntary. (4-1-97)

03. Time Limit. Release time will be scheduled upon the application of a parent or guardian of a student in grades nine through twelve (9-12), not to exceed five (5) periods per week or one hundred sixty-five (165) hours during any one (1) academic school year. (4-1-97)

04. Location. Release time programs will be conducted away from public school buildings and public school property. (4-1-97)

05. Request by Parent. No student will be permitted to leave the school grounds during the school day to attend release time programs except upon written request from a parent or guardian filed with the school principal. Such written request by the parent will become a part of the student's permanent record. (4-1-97)

06. Record Maintenance. The public school will not be responsible for maintaining attendance records for a student who, upon written request of a parent or guardian, is given permission to leave the school grounds to attend a release time program. The school district will maintain a record of each student's daily schedule that indicates when a student is released for classes in religious education or for other purposes. (4-1-97)

07. Liability. The school district is responsible for ensuring that no public school property, public funds or other public resources are used in any way to operate these programs. The school district is not liable for any injury, act or event occurring while the student participates in such programs. (4-1-97)

08. Course Credit. No credit will be awarded by the school or district for satisfactory completion by a student of a course or courses in release time for religious instruction. Credit may be granted for other purposes, at the discretion of the local school board. (4-1-97)

09. Separation From Public Schools. Public schools will not include schedules of classes for release time programs in school catalogs, registration forms or any other regularly printed public school material. Registration for release time programs must occur off school premises, and must be done on forms and supplies furnished by the group or institution offering the program. Teachers of release time programs are not to be considered members of any public school faculty and should not be asked to participate as faculty members in any school functions or to assume responsibilities for operation of any part of the public school program. (4-1-97)

10. Transportation Liability. Public schools and school districts will not be liable or responsible for the health, safety and welfare of students while they are being transported to and from or participating in release time programs. (4-1-97)

221. -- 229. (RESERVED)

230. DRIVER EDUCATION.
Public Schools. Pursuant to Section 004 of these rules, all public driver education courses offered in Idaho public schools must be conducted in compliance with all the requirements in the Operating Procedures for Idaho Public Driver Education Programs, as incorporated. (4-7-11)

231. -- 239. (RESERVED)

240. JUVENILE DETENTION CENTERS.

01. Definition of Terms. (4-1-97)

a. Juvenile Detention Centers: Facilities that provide for the temporary care of children, as defined in the Juvenile Justice Reform Corrections Act, who require secure custody, for their own or the community's protection, in physically restricting facilities pending court disposition or subsequent to court disposition. (Section 33-2009, Idaho Code) (4-1-97)

b. Juvenile Offender: A person, as defined in the Juvenile Justice Reform Act, who has been petitioned or adjudicated for a delinquent act that would constitute a felony or misdemeanor if committed by an adult. (4-1-97)

02. Instructional Program. Every public school district in the state within which is located a public or private detention facility housing juvenile offenders pursuant to court order will provide an instructional program. The instructional program will: (4-1-97)

a. Provide course work that meets the minimum requirements of Idaho State Board of Education Rules. (4-1-97)

b. Provide instruction in the core of instruction. (4-1-97)

c. Include the following components, where appropriate: self-concept improvement, social adjustment, physical fitness/personal health, vocational/occupational, adult living skills, and counseling. (4-1-97)

d. Provide instruction and guidance that may lead to a high school diploma. School districts will accept such instruction for purposes of issuing credit when the detention center certifies to the school that the appropriate work is completed. (4-1-97)

e. Be directed by an instructor who holds an appropriate, valid certificate. (4-1-97)

f. Be provided to each student not later than two (2) school days after admission and continue until the student is released from the detention center. (4-1-97)

g. Be provided to students who have attained "school age" as defined in Idaho Code 33-201. (4-1-97)

h. Be provided for a minimum of four (4) hours during each school day. (4-1-97)

i. Be based on the needs and abilities of each student. The resident school district will provide pertinent status information as requested by the Juvenile Detention Center. (4-1-97)

j. Be coordinated with the instructional program at the school the student attends, where appropriate. (4-1-97)

k. Be provided in a facility that is adequate for instruction and study. (4-1-97)

03. State Funding of Instructional Programs at Juvenile Detention Centers. (4-1-97)

a. Every student housed in a juvenile detention center pursuant to court order and participating in an instructional program provided by a public school district will be counted as an exceptional child by the district for purposes of state reimbursement. (4-1-97)

b. Public school districts that educate pupils placed by Idaho court order in juvenile detention centers will be eligible for an allowance equivalent to the previous year's certified local annual tuition rate per pupil. The district allowance will be in addition to support unit funding and included in the district apportionment payment. (4-1-97)

c. To qualify for state funding of instructional programs at Juvenile Detention Centers, school districts must apply for such funding on forms provided by the State Department of Education. Applications are subject to the review and approval of the State Superintendent of Public Instruction. School districts will submit attendance and enrollment reports as required by the State Superintendent of Public Instruction. Juvenile Detention Centers will submit reports to the local school district as required. (4-1-97)

241. -- 999. (RESERVED)

CAREER TECHNICAL EDUCATION

SUBJECT

Proposed Rule IDAPA 08.02.03., Career Technical Education Secondary Programs – Content Standards

REFERENCE

June 2016	Board approved the career technical secondary program standards.

APPLICABLE STATUTE, RULE, OR POLICY

Section 33-118, Idaho Code
Section 33-1612, Idaho Code
Section 33-2211, Idaho Code
Idaho Administrative code, IDAPA 08.02.03, Rules Governing Thoroughness

BACKGROUND/DISCUSSION

Similar to academic programs, content standards exist for our career technical programs. These content standards are developed with secondary and postsecondary instructors and industry representatives. In the past, interested stakeholders were pulled together to determine the existing program content standards. This work set the basis for the technical program at the secondary level and prepares the foundation for secondary program testing. Postsecondary instructors provided guidance into the postsecondary program, and industry representatives validated the outcomes with current needs of the particular industry occupations supported by the program.

Once the technical standards and student learning outcomes were developed and vetted through the initial development team, the learning outcomes were shared with a larger group of industry representatives. The Division of Career Technical Education (Division) asked industry representatives to rank each learning outcome as to their importance in the workplace. Each learning outcome was then scored and reflected in the program Technical Skills Assessment based on the level of criticality established by the representative community.

Each secondary career-technical program is evaluated regularly by the Division and held to these standards. Currently these standards are standalone documents updated and maintained by the Division. Board approval and subsequent incorporation of these standards into administrative code will elevate the importance of these standards to the same level as academic content standards, provide continuity between those career technical content areas that are taught by academic instructors and career technical instructors, and provide for more transparency in the standards setting process when future updates are made.

IMPACT

Approval of the proposed rule changes will add the Career Technical Education (CTE) content standards, approved by the Board at the June 2016 Board meeting, into administrative rule in a similar fashion as the existing academic content standards. The standards being incorporated are the existing CTE content standards that are currently being used by our secondary CTE programs.

ATTACHMENTS

Attachment 1 – Proposed Rule changes to IDAPA 08.02.03.004 Page 3

STAFF COMMENTS AND RECOMMENDATIONS

Proposed rules have a 21 day comment period prior to becoming pending rules. Based on received comments and Board direction, changes may be made to proposed rules prior to entering the pending stage. All pending rules will be brought back to the board for approval prior to submittal to the Department of Administration for publication in the Idaho Administrative Rules Bulletin as a pending Rule. Pending rules become effective at the end of the legislative session in which they are submitted if they are not rejected by the Legislature.

Staff recommends approval.

BOARD ACTION

I move to approve changes to the proposed rule IDAPA 08.02.03.004, as submitted in Attachment 1.

Moved by __________ Seconded by __________ Carried Yes _____ No _____

**IDAPA 08
TITLE 02
CHAPTER 03**

08.02.03 - RULES GOVERNING THOROUGHNESS

004. INCORPORATION BY REFERENCE.
The following documents are incorporated into this rule: (3-30-07)

01. The Idaho Content Standards. The Idaho Content Standards as adopted by the State Board of Education. Individual subject content standards are adopted in various years in relation to the curricular materials adoption schedule. Copies of the document can be found on the State Board of Education website at www.boardofed.idaho.gov. (3-29-10)

a. Driver Education, as revised and adopted on August 21, 2008. (3-29-10)

b. Health, as revised and adopted on April 17, 2009. (3-29-10)

c. Humanities Categories: (3-29-10)

i. Art, as revised and adopted on April 17, 2009; (3-29-10)

ii. Dance, as revised and adopted on April 17, 2009; (3-29-10)

iii. Drama, as revised and adopted on April 17, 2009; (3-29-10)

iv. Interdisciplinary, as revised and adopted on April 17, 2009; (3-29-10)

v. Music, as revised and adopted on April 17, 2009; (3-29-10)

vi. World languages, as revised and adopted on April 17, 2009; (3-29-10)

d. English Language Arts, as revised and adopted on August 11, 2010. (4-7-11)

e. Limited English Proficiency, as revised and adopted on August 21, 2008. (3-29-10)

f. Mathematics, as revised and adopted on August 11, 2010. (4-7-11)

g. Physical Education, as revised and adopted on April 17, 2009. (3-29-10)

h. Science, as revised and adopted on April 17, 2009. (3-29-10)

i. Social Studies, as revised and adopted on April 17, 2009. (3-29-10)

j. Information and Communication Technology, as revised and adopted on April 22, 2010. (4-7-11)

k. Career Technical Education Categories: (   )
i. Agricultural and Natural Resources, as adopted on June 16, 2016. (   )
ii. Business and Marketing Education, as adopted on June 16, 2016. (   )
iii. Engineering and Technology Education, as adopted on June 16, 2016. (   )
iv. Family and Consumer Sciences, as adopted on June 16, 2016. (   )
vii. Skilled and Technical Sciences, as adopted on June 16, 2016. (   )
viii. Workplace Readiness, as adopted on June 16, 2016. (   )

02. The English Language Development (ELD) Standards. The World-Class Instructional Design and Assessment (WIDA) 2012 English Language Development (ELD) Standards as adopted by the State Board of Education on August 16, 2012. Copies of the document can be found on the WIDA website at www.wida.us/standards/eld.aspx. (4-4-13)

03. The Limited English Proficiency Program Annual Measurable Achievement Objectives (AMAOs) and Accountability Procedures. The Limited English Proficiency Program Annual Measurable Achievement Objectives and Accountability Procedures as adopted by the State Board of Education on November 11, 2009. Copies of the document can be found on the State Department of Education website at www.sde.idaho.gov. (4-7-11)

04. The Idaho English Language Assessment (IELA) Achievement Standards. The Idaho English Language Assessment (IELA) Achievement Standards as adopted by the State Board of Education on November 11, 2009. Copies of the document can be found on the State Department of Education website at www.sde.idaho.gov. (4-7-11)

05. The Idaho Standards Achievement Tests (ISAT) Achievement Standards. Achievement Standards as adopted by the State Board of Education on May 30, 2007. Copies of the document can be found on the State Board of Education website at www.boardofed.idaho.gov. (4-2-08)

06. The Idaho Extended Content Standards. The Idaho Extended Content Standards as adopted by the State Board of Education on April 17, 2008. Copies of the document can be found at the State Board of Education website at www.boardofed.idaho.gov. (5-8-09)

07. The Idaho Alternate Assessment Achievement Standards. Alternate Assessment Achievement Standards as adopted by the State Board of Education on May 18, 2011. Copies of the document can be found on the State Board of Education website at www.boardofed.idaho.gov. (3-29-12)

08. The Idaho Standards for Infants, Toddlers, Children, and Youth Who Are Deaf or Hard of Hearing. As adopted by the State Board of Education on October 11, 2007. Copies of the document can be found on the State Board of Education website at www.boardofed.idaho.gov. (4-2-08)

09. The Idaho Standards for Infants, Toddlers, Children, and Youth Who Are Blind or Visually Impaired. As adopted by the State Board of Education on October 11, 2007. Copies of the document can be found on the State Board of Education website at www.boardofed.idaho.gov. (4-2-08)

SUBJECT

Proposed Rule IDAPA 08.02.03.105, Rules Governing Thoroughness – Graduation Requirement - Proficiency

REFERENCE

August 2015	Board approved Proposed Rule IDAPA 08.02.03.105, which addressed several outstanding issues with the language that were caused in part by the partial rejection of the pending rule approved by the Board in 2014.
November 2015	Board approved pending rule changes to IDAPA 08.02.03.105
April 2016	Board adopted recommendations from the Accountability Oversight Committee to remove the graduation ISAT proficiency requirement.

APPLICABLE STATUTE, RULE, OR POLICY

IDAPA 08.02.03. Rules Governing Thoroughness, subsection 105.

BACKGROUND/DISCUSSION

As part of the transition to the Idaho Standards Achievement Test (ISAT) developed by Smarter Balanced and currently administered by AIR, the Board had approved changes to the graduation proficiency requirement in 2014. These changes in part moved the proficiency grade level requirement from grade ten (10) to grade eleven (11), exempting those students graduating in 2016 and 2017 from having to show proficiency on the assessment to graduate and allowed those students who showed proficiency in grade nine (9) to bank their scores. The exemption for those students graduating in 2016 had been in place since 2014. During the 2015 legislative session, the pending rule exempting students graduating in 2017, as well as moving the assessment to grade eleven (11), was rejected. The Board promulgated rules in 2015 to provide for an exemption of the proficiency requirement for students who took the assessment in 2015 (during the baseline year) and made technical corrections that were made necessary due to the partial rejection by the legislature during the previous year. The proficiency requirement for graduation purposes was first established by the Board in 2003, and was added to Administrative Code effective 2004, and became effective for students starting on January 1, 2006.

Since those initial discussions in 2015, the Board's Accountability Oversight Committee has forwarded a recommendation to the Board asking the Board remove the graduation proficiency requirement in its entirety. The Board adopted that recommendation at the April 2016 Board meeting and directed staff to bring back a proposed rule to implement the recommendation.

The proposed amendments to IDAPA 08.02.02.105.06 eliminate the proficiency in its entirety, elimination of the proficiency requirement includes the elimination of the alternate routes to proficiency as well. If accepted by the legislature high school students will no longer need to show proficiency on the ISAT to graduate and school districts will no longer need to submit alternate plans for graduation to the Board office.

IMPACT

Approval of the proposed rule will eliminate the ISAT proficiency graduation requirement in its entirety.

ATTACHMENTS

Attachment 1 – Proposed Rule changes to IDAPA 08.02.03.105 Page 3

STAFF COMMENTS AND RECOMMENDATIONS

Proposed rules have a 21 day comment period prior to becoming pending rules. Based on received comments and Board direction, changes may be made to proposed rules prior to entering the Pending stage. All pending rules will be brought back to the board for approval prior to submittal to the Department of Administration for publication in the Idaho Administrative Rules Bulletin as a pending rule. Pending rules become effective at the end of the legislative session in which they are submitted.

Staff recommends approval.

BOARD ACTION

I move to approve changes to Proposed Rule IDAPA 08.02.03.105, as submitted in Attachment 1.

Moved by __________ Seconded by __________ Carried Yes _____ No _____

105. HIGH SCHOOL GRADUATION REQUIREMENTS.
A student must meet all of the requirements identified in this section before the student will be eligible to graduate from an Idaho high school. The local school district or LEA may establish graduation requirements beyond the state minimum. (5-8-09)

01. Credit Requirements. The State minimum graduation requirement for all Idaho public high schools is forty-six (46) credits and must include twenty-nine (29) credits in core subjects as identified in Paragraphs 105.01.c. through 105.01.i. (3-12-14)

a. Credits. (Effective for all students who enter the ninth grade in the fall of 2010 or later.) One (1) credit shall equal sixty (60) hours of total instruction. School districts or LEA's may request a waiver from this provision by submitting a letter to the State Department of Education for approval, signed by the superintendent and chair of the board of trustees of the district or LEA. The waiver request shall provide information and documentation that substantiates the school district or LEA's reason for not requiring sixty (60) hours of total instruction per credit. (3-29-10)

b. Mastery. Notwithstanding the credit definition of subsection 01.a. ~~A~~a student may also achieve credits by demonstrating mastery of a subject's content standards as defined and approved by the local school district or LEA. (3-29-10)

c. Secondary Language Arts and Communication. Nine (9) credits are required. Eight (8) credits of instruction in Language Arts. Each year of Language Arts shall consist of language study, composition, and literature and be aligned to the Idaho Content Standards for the appropriate grade level. One (1) credit of instruction in communications consisting of oral communication and technological applications that includes a course in speech, a course in debate, or a sequence of instructional activities that meet the Idaho Speech Content Standards requirements. (3-29-10)

d. Mathematics. Six (6) credits are required. Secondary mathematics includes Applied Mathematics, Business Mathematics, Algebra, Geometry, Trigonometry, Fundamentals of Calculus, Probability and Statistics, Discrete Mathematics, and courses in mathematical problem solving and reasoning. AP Computer Science, Dual Credit Computer Science, and Dual Credit Engineering courses may also be counted as a mathematics credit if the student has completed Algebra II standards. Students who choose to take AP Computer Science, Dual Credit Computer Science, and Dual Credit Engineering may not concurrently count such courses as both a math and science credit. (3-12-14)

i. Students must complete secondary mathematics in the following areas: (3-12-14)

(1) Two (2) credits of Algebra I or courses that meet the Idaho Algebra I Content Standards as approved by the State Department of Education; (3-29-10)

(2) Two (2) credits of Geometry or courses that meet the Idaho Geometry Content Standards as approved by the State Department of Education; and (3-29-10)

(3) Two (2) credits of mathematics of the student's choice. (3-29-10)

ii. Two (2) credits of the required six (6) credits of mathematics must be taken in the last year of high school in which the student intends to graduate. For the purposes of this subsection, the last year of high school shall include the summer preceding the fall start of classes. Students who return to school during the summer or the following fall of the next year for less than a full schedule of courses due to failing to pass a course other than math are not required to retake a math course as long as they have earned six (6) credits of high school level mathematics. (3-12-14)

iii. Students who have completed six (6) credits of math prior to the fall of their last year of high school, including at least two (2) semesters of an Advanced Placement or dual credit calculus or higher level course, are exempt from taking math during their last year of high school. High School math credits completed in middle school shall count for the purposes of this section. (3-12-14)

e. Science. Six (6) credits are required, four (4) of which will be laboratory based. Secondary sciences include instruction in applied sciences, earth and space sciences, physical sciences, and life sciences. Up to two (2) credits in AP Computer Science, Dual Credit Computer Science, and Dual Credit Engineering may be used as science credits. Students who choose to take AP Computer Science, Dual Credit Computer Science, and Dual Credit Engineering may not concurrently count such courses as both a math and science credit. (3-12-14)

i. Secondary sciences include instruction in the following areas: biology, physical science or chemistry, and earth, space, environment, or approved applied science. Four (4) credits of these courses must be laboratory based. (3-29-10)

f. Social Studies. Five (5) credits are required, including government (two (2) credits), United States history (two (2) credits), and economics (one (1) credit). Courses such as geography, sociology, psychology, and world history may be offered as electives, but are not to be counted as a social studies requirement. (3-29-10)

g. Humanities. Two (2) credits are required. Humanities courses include instruction in visual arts, music, theatre, dance, or world language aligned to the Idaho content standards for those subjects. Other courses such as literature, history, philosophy, architecture, or comparative world religions may satisfy the humanities standards if the course is aligned to the Idaho Interdisciplinary Humanities Content Standards. (3-29-10)

h. Health/Wellness. One (1) credit is required. Course must be aligned to the Idaho Health Content Standards. Effective for all public school students who enter grade nine (9) in Fall 2015 or later, each student shall receive a minimum of one (1) class period on psychomotor cardiopulmonary resuscitation (CPR) training as outlined in the American Heart Association (AHA) Guidelines for CPR to include the proper utilization of an automatic external defibrillator (AED) as part of the Health/Wellness course. (3-12-14)

i. Students participating in one (1) season in any sport recognized by the Idaho High School Activities Association or club sport recognized by the local school district, or eighteen (18) weeks of a sport recognized by the local school district may choose to substitute participation up to one (1) credit of physical education. Students must show mastery of the content standards for Physical Education in a format provided by the school district. (4-1-15)

02. Content Standards. Each student shall meet locally established subject area standards (using state content standards as minimum requirements) demonstrated through various measures of accountability including examinations or other measures. (3-29-10)

03. College Entrance Examination. (Effective for all public school students who enter grade nine (9) in Fall 2012 or later.) (3-12-14)

a. A student must take one (1) of the following college entrance examinations before the end of the student's eleventh grade year: SAT or ACT. Students graduating prior to 2017 may also use the Compass to meet this requirement. A student who misses the statewide administration of the college exam during the student's grade eleven (11) for one (1) of the following reasons, may take the examination during their grade twelve (12) to meet this requirement: (3-25-16)

i. Transferred to an Idaho school district during grade eleven (11); (3-12-14)

ii. Was homeschooled during grade eleven (11); or (3-12-14)

iii. Missed the spring statewide administration of the college entrance exam dates for documented medical reasons. (3-12-14)

b. A student may elect an exemption in grade eleven (11) from the college entrance exam requirement if the student is: (3-12-14)

i. Enrolled in a special education program and has an Individual Education Plan (IEP) that specifies accommodations not allowed for a reportable score on the approved tests; (3-12-14)

ii. Enrolled in a Limited English Proficient (LEP) program for three (3) academic years or less; or (3-12-14)

iii. Enrolled for the first time in grade twelve (12) at an Idaho high school after the fall statewide administration of the college entrance exam. (4-1-15)

04. Senior Project. A student must complete a senior project by the end of grade twelve (12). The project must include a written report and an oral presentation. Additional requirements for a senior project are at the discretion of the local school district or LEA. (3-12-14)

05. Middle School. A student will have met the high school content and credit area requirement for any high school course if the requirements outlined in Subsections 105.05.a. through 105.05.c. of this rule are met. (3-25-16)

a. The student completes such course with a grade of C or higher before entering grade nine (9); (3-12-14)

b. The course meets the same content standards that are required in high school for the same course; and (3-25-16)

c. The course is taught by a teacher properly certified to teach high school content and who meets the federal definition of highly qualified for the course being taught. (3-25-16)

d. The student shall be given a grade for the successful completion of that course and such grade and the number of credit hours assigned to the course shall be transferred to the student's high school transcript. Notwithstanding this requirement, the student's parent or guardian shall be notified in advance when credits are going to be transcribed and may elect to not have the credits and grade transferred to the student's high school transcript. Courses taken in middle school appearing in the student's high school transcript, pursuant to this subsection, shall count for the purpose of high school graduation. However, the student must complete the required number of credits in all high school core subjects as identified in Subsections 105.01.c. through 105.01.h. except as provided in 105.01.d.iii. The transcribing high school is required to verify the course meets the requirements specified in Subsections 105.05.a. through 105.05.b. of this rule. (3-25-16)

~~**06. Proficiency**. Each student must achieve a proficient or advanced score on the grade ten (10) Idaho Standards Achievement Test (ISAT) in math, reading and language usage in order to graduate unless specifically exempted from doing so as contained herein. Students who will graduate in 2016 and who received a proficient or advanced score on the grade ten (10) ISAT while in grade nine (9) may bank the score for purposes of meeting this graduation requirement. A student who does not attain at least a proficient score prior to graduation will be given an opportunity to demonstrate proficiency of the content standards through a locally established plan. School districts or LEAs shall adopt an alternate plan and provide notice of that plan to all students who have not achieved a proficient or advanced score on the grade ten (10) Idaho Standards Achievement Test prior to the fall semester of the student's junior year. All locally established alternate plans used to demonstrate proficiency shall be forwarded to the State Board of Education for review. Alternate plans that are not in conformance with the requirements of Subsection 105.06.b shall be returned to the LEA and must be resubmitted in conformance with the requirements contained herein prior to students attempting the alternate plan. Alternate plans must be promptly re-submitted to the Board whenever changes are made in such plans. The LEA must provide a descriptive summary of how each measure is aligned to the grade ten (10), or higher, state content standards and shows students proficiency. The Board may request plans to be submitted in a common format or request additional information as necessary to determine plans are in conformance with these rules. (3-25-16)~~

~~**a.** Before entering an alternate plan, the student must be: (3-25-16)~~

~~i. Enrolled in a special education program and have an Individual Education Plan (IEP); or (3-20-04)~~

~~ii. Enrolled in an Limited English Proficient (LEP) program for three (3) academic years or less; or (3-20-04)~~

~~iii. Enrolled in the fall semester of the senior year. (3-20-04)~~

~~**b.** The alternate plan must: (4-7-11)~~

~~i. Contain multiple measures of student achievement, if alternate paths are available to the student within the LEA's alternate plan, each path must contain multiple measures; (3-25-16)~~

~~ii. Be aligned at a minimum to tenth grade state content standards; (4-7-11)~~

~~iii. Be aligned to the state content standards for the subject matter in question; (4-7-11)~~

~~iv. Be valid and reliable; (3-25-16)~~

~~v. Ninety percent (90%) of the alternate plan criteria must be based on academic proficiency and performance; (3-25-16)~~

~~vi. At least one (1) measure must utilize an externally reviewed, validated assessment as the evaluation tool; and(3-25-16)~~

~~vii. Measures may not be duplicative of the State graduation requirements. (3-25-16)~~

~~**c.** A student is not required to achieve a proficient or advanced score on the ISAT if: (5-8-09)~~

~~i. The student received a proficient or advanced score on an exit exam from another state that requires a standards-based exam for graduation. The state's exit exam must approved by the State Board of Education and must measure skills at the tenth grade level and be in comparable subject areas to the ISAT; (5-8-09)~~

~~ii. The student completes another measure established by a school district or LEA and received by the Board as outlined in Subsection 105.06; or (3-29-10)~~

~~iii. The student has an IEP that outlines alternate requirements for graduation or adaptations are recommended on the test; (5-8-09)~~

~~iv. The student is considered an LEP student through a score determined on a language proficiency test and has been in an LEP program for three (3) academic years or less; (5-8-09)~~

~~v. The student will graduate in 2017 and completed the grade ten (10) ISAT in math, reading and language usage in 2015. (3-25-16)~~

~~**d.** Those students who will graduate in 2016 and have not received a proficient or advanced score on the ISAT in grade nine (9), will be required to complete an alternative plan for graduation, as designed by the district, including the elements prescribed in Subsection 105.06.b. and may enter the alternate path prior to the fall of their senior year. (3-12-14)~~

07. Special Education Students. A student who is eligible for special education services under the Individuals With Disabilities Education Improvement Act must, with the assistance of the student's Individualized Education Program (IEP) team, refer to the current Idaho Special Education Manual for guidance in addressing graduation requirements. (4-11-06)

08. Foreign Exchange Students. A foreign exchange student may be eligible for graduation by completing a comparable program as approved by the school district or LEA. (4-11-06)

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SUBJECT

Proposed Rule IDAPA 08.02.03.105, Rules Governing Thoroughness – Graduation Requirement – Civics Proficiency

APPLICABLE STATUTE, RULE, OR POLICY

Section 33-1602, Idaho Code

BACKGROUND/DISCUSSION

During the 2015 legislative session, changes were made to Section 33-1602, Idaho Code requiring students to show they could meet the Idaho civics and government content standards either through the "civics test" or an alternate measure determined by the school district. During the 2016 legislative session it was discovered that districts did not understand what was allowed under an alternate measure. During the 2016 legislative session additional amendments were made to Section 33-1602, Idaho Code specifying that the applicability of this subsection to a pupil who receives special education services is governed by the pupil's individualized education plan (IEP). While this language provided some additional clarification showing that the "alternate path determined by the school district" were different than provisions applied to student on an IEP, Board staff were asked to still provide additional clarification through administrative rule.

The proposed rule amendments would add a new section to IDAPA 08.02.03.105 clearly stating that in addition to the "civics test" defined in Section 33-1602, a school district may choose an alternate path through single or multiple measures for a student to show they have met the state civics and government content standards.

IMPACT

Approval of the proposed rule would provide clarification on the alternate path a school district may use for measuring student civics proficiency.

ATTACHMENTS

Attachment 1 – Proposed Rule changes to IDAPA 08.02.03.105 Page 3

STAFF COMMENTS AND RECOMMENDATIONS

Proposed rules have a 21 day comment period prior to becoming pending rules. Based on received comments and Board direction, changes may be made to proposed rules prior to entering the Pending stage. All pending rules will be brought back to the board for approval prior to submittal to the Department of Administration for publication in the Idaho Administrative Rules Bulletin as a pending rule. Pending rules become effective at the end of the legislative session in which they are submitted.

Temporary rules go into effect at the time of Board approval unless an alternative effective date is specified by Board action. To qualify as a temporary rule, the rule must meet one of three criteria: provides protection of public health, safety, or welfare; or is to come into compliance with deadlines in amendments to governing law or federal programs; or is conferring a benefit. This rule qualifies as temporary rules as it brings the state in compliance with Section 33-1602, Idaho Code. The requirement will be applied for the first time to students graduating in the 2016-2017 school year.

Staff recommends approval.

BOARD ACTION

I move to approve changes to Proposed Rule IDAPA 08.02.03.105, as submitted in Attachment 1.

Moved by __________ Seconded by __________ Carried Yes _____ No _____

105. HIGH SCHOOL GRADUATION REQUIREMENTS.
A student must meet all of the requirements identified in this section before the student will be eligible to graduate from an Idaho high school. The local school district or LEA may establish graduation requirements beyond the state minimum. (5-8-09)

(Break in Continuity of Sections)

05. Civics and Government Proficiency. Pursuant to Section 33-1602, Idaho Code each LEA may establish an alternate path for determining if a student has met the state civics and government content standards. Alternate paths are open to all students in grades 7 through 12. Any student who has been determined proficient in the state civics and government content standards either through the completion of the civics test or an alternate path shall have it noted on the student's high school transcript.

~~05~~06. Middle School. A student will have met the high school content and credit area requirement for any high school course if the requirements outlined in Subsections 105.05.a. through 105.05.c. of this rule are met. (3-25-16)

a. The student completes such course with a grade of C or higher before entering grade nine (9); (3-12-14)

b. The course meets the same content standards that are required in high school for the same course; and (3-25-16)

c. The course is taught by a teacher properly certified to teach high school content and who meets the federal definition of highly qualified for the course being taught. (3-25-16)

d. The student shall be given a grade for the successful completion of that course and such grade and the number of credit hours assigned to the course shall be transferred to the student's high school transcript. Notwithstanding this requirement, the student's parent or guardian shall be notified in advance when credits are going to be transcribed and may elect to not have the credits and grade transferred to the student's high school transcript. Courses taken in middle school appearing in the student's high school transcript, pursuant to this subsection, shall count for the purpose of high school graduation. However, the student must complete the required number of credits in all high school core subjects as identified in Subsections 105.01.c. through 105.01.h. except as provided in 105.01.d.iii. The transcribing high school is required to verify the course meets the requirements specified in Subsections 105.05.a. through 105.05.b. of this rule. (3-25-16)

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SUBJECT

Proposed Rule IDAPA 08.02.03.111 through .114, Rules Governing Thoroughness – Comprehensive Assessment Program and Accountability Requirements

REFERENCE

August 2003	Board approved changes to Proposed Rule 08.02.03.112
June 2010	Board approved a one year waiver of IDAPA 08.02.03.111.07.b requiring the Department administer the Direct Math and Direct Writing Assessment
August 2010	Board approved temporary and propsed rule changes to IDAPA 08.02.03.111 requiring districts send out all assessment results within three weeks of receipt from the state
October 2011	Board approved pending rule changes to IDAPA 08.02.03.111
August 2011	Board approved a proposed rule amendment removing the reference to the Direct Math and Direct Writing Assessment from IDAPA 08.02.03.111, subsection 03, 06, and 07
October 2011	Board approved pending rule changes to IDAPA 08.02.03.111
August 2014	Board approved a one year waiver of 08.02.03.113. Reward Schools
January 2014	Board approved a one year waiver of 08.02.03.111.06 subsections j and k for one year
October 2015	Accountability Oversight Committee presented recommendations to the Board regarding changes to be made to the state's accountability system, in preparation for submission of a new ESEA waiver
February 2016	Board received an update on the timeline for the Accountability Oversight Committee to bring recommendations forward
April 2016	Accountability Oversight Committee presented recommendations to the Board regarding removal of the ISAT proficiency and college entrance exam graduation requirements. The Board adopted the recommendation that the ISAT proficiency graduation requirement be removed and rejected the recommendation that the college entrance exam graduation requirement be removed.

APPLICABLE STATUTE, RULE, OR POLICY

IDAPA 08.02.03., Rules Governing Thoroughness, subsection 111 through 114

Elementary and Secondary Education Act as reauthorized by the Every Student Succeds Act.

BACKGROUND / DISCUSSION

The Board originally embarked on the creation of provisions assessment and accountability in 1997. Since that time there have been many changes at the state and federal level regarding assessments and accountability. In January 2016, the Planning, Policy and Governmental Affairs Committee charged the Accountability Oversight Committee (AOC) with bringing forward recommendations to the Board that were in alignment with the Task Force recommendations for a new state accountability system (Recommendation 5 – 2013) and would meet the federal accountability requirements (the Board will be considering those recommendations under a different agenda item). Once adopted, those recommendations need to be incorporated into changes to Administrative Code, specifically, IDAPA 08.02.03.111 through .113. The original timeline for these recommendations was scheduled for the June 2016 Board meeting, however, the committee felt it needed to have additional time to conduct a survey to gather broader public input. Due to the rulemaking deadlines this means that the propsoed amendments to administrative rule will have to be considered by the Board at the same meeting the Board is considering the recommendations themselves. The proposed rule approved by the Board will go through the standard rulemaking process. This includes a 21 day public comment period, potential changes to the rule based on those comments, final consideration by the Board in November 2016 of a pending rule and then consideration by the Legislature in 2017. Once accepted by the Legislature the rule would go into effect in the spring of 2017. The proposed amendments are based on the AOC recommendations. There will be an opportunity at the Board meeting to amend the proposed rule based on the provisions adopted by the Board at the August 2016 Board meeting.

The current timeline for implementing the Every Student Succeds Act (ESSA) requires states have accountability and assessment provisions in place for the 2017-2018 school year. The Board discussed at the February 2016 Board meeting the desire to have provisions in place for one year prior to the first year required under ESSA, this would allow the state to assure the data was being collected consistently and accurately as well as look at the data to make sure it was actually measuring the right things prior to a school being held accountable to these measures for federal accountability purposes.

The proposed amendments to IDAPA 08.02.03.111 would make technical corrections that have been identified during the last year to the language around the requirements for the end of course science assessments and move the required administration of the Idaho Standards Achievement Test (ISAT) at the high school level to the 11th grade.

The proposed amendments to IDAPA 08.02.03.112 would remove outdated terms like "Adequate Yearly Progress" while at the same time referencing state level progress will be set by the State Board of Education. Existing language regarding the participation rate and definitions of schools and subgroups would remain the same. Finally, the measures that make up the framework will be incorporated into the rule at the category level, definitions and format of data collected will be approved by the Board based on the Data Management Council recommendations and the specific details around the recommended growth model will be approved by the Board at a later date.

The proposed amendments to IDAPA 08.02.03.113 would repeal the section in it's entirety. The current Distinguished School requirements were based on the Five Star system and are not applicable at this time. The Distinguished School awards were valued by the schools when granted and it is recommended that a new system be developed for recognizing and awarding high achieving schools by the Board, however, until that system is developed it is recommended that this section be repealed.

The proposed amendments to IDAPA 08.02.03.114 would make technical corrections, updating languge to current references, however, it would not be substantially changed at this time.

IMPACT

Approval of the proposed rule is the first step in implementing a new accountability for the State of Idaho.

ATTACHMENTS

Attachment 1 – Proposed Rule IDAPA 08.02.03.111 through 114 Page 5

STAFF COMMENTS AND RECOMMENDATIONS

Proposed rules have a 21 day comment period prior to becoming pending rules. Based on received comments and Board direction, changes may be made to proposed rule prior to entering the pending stage. All pending rules will be brought back to the board for approval prior to submittal to the Department of Administration for publication in the Idaho Administrative Rules Bulletin as a pending rule. Pending rules become effective at the end of the legislative session in which they are submitted if they are not rejected by the Legislature.

BOARD ACTION

I move to approve changes to proposed rule IDAPA 08.02.03.111, 112, 113, and 114, as submitted in Attachment 1.

Moved by ___________ Seconded by __________Carried: Yes ___ No___

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IDAPA 08
TITLE 02
CHAPTER 03

08.02.03 - RULES GOVERNING THOROUGHNESS

004. INCORPORATION BY REFERENCE.
The following documents are incorporated into this rule: (3-30-07)

01. The Idaho Content Standards. The Idaho Content Standards as adopted by the State Board of Education. Individual subject content standards are adopted in various years in relation to the curricular materials adoption schedule. Copies of the document can be found on the State Board of Education website at www.boardofed.idaho.gov. (3-29-10)

a. Driver Education, as revised and adopted on August 21, 2008. (3-29-10)

b. Health, as revised and adopted on April 17, 2009. (3-29-10)

c. Humanities Categories: (3-29-10)

i. Art, as revised and adopted on April 17, 2009; (3-29-10)

ii. Dance, as revised and adopted on April 17, 2009; (3-29-10)

iii. Drama, as revised and adopted on April 17, 2009; (3-29-10)

iv. Interdisciplinary, as revised and adopted on April 17, 2009; (3-29-10)

v. Music, as revised and adopted on April 17, 2009; (3-29-10)

vi. World languages, as revised and adopted on April 17, 2009; (3-29-10)

d. English Language Arts, as revised and adopted on August 11, 2010. (4-7-11)

e. Limited English Proficiency, as revised and adopted on August 21, 2008. (3-29-10)

f. Mathematics, as revised and adopted on August 11, 2010. (4-7-11)

g. Physical Education, as revised and adopted on April 17, 2009. (3-29-10)

h. Science, as revised and adopted on April 17, 2009. (3-29-10)

i. Social Studies, as revised and adopted on April 17, 2009. (3-29-10)

j. Information and Communication Technology, as revised and adopted on April 22, 2010. (4-7-11)

02. The English Language Development (ELD) Standards. The World-Class Instructional Design and Assessment (WIDA) 2012 English Language Development (ELD) Standards as adopted by the State Board of Education on August 16, 2012. Copies of the document can be found on the WIDA website at www.wida.us/standards/eld.aspx. (4-4-13)

03. The Limited English Proficiency Program Annual Measurable Achievement Objectives (AMAOs) and Accountability Procedures. The Limited English Proficiency Program Annual Measurable

Achievement Objectives and Accountability Procedures as adopted by the State Board of Education on November 11, 2009. Copies of the document can be found on the State Department of Education website at www.sde.idaho.gov. (4-7-11)

~~**04. The Idaho English Language Assessment (IELA) Achievement Standards**. The Idaho English Language Assessment (IELA) Achievement Standards as adopted by the State Board of Education on November 11, 2009. Copies of the document can be found on the State Department of Education website at www.sde.idaho.gov. (4-7-11)~~

0~~5~~4. The Idaho Standards Achievement Tests (ISAT) Achievement Standards. Achievement Standards as adopted by the State Board of Education on May 30, 2007. Copies of the document can be found on the State Board of Education website at www.boardofed.idaho.gov. (4-2-08)

0~~6~~5. The Idaho Extended Content Standards. The Idaho Extended Content Standards as adopted by the State Board of Education on April 17, 2008. Copies of the document can be found at the State Board of Education website at www.boardofed.idaho.gov. (5-8-09)

0~~7~~6. The Idaho Alternate Assessment Achievement Standards. Alternate Assessment Achievement Standards as adopted by the State Board of Education on May 18, 2011. Copies of the document can be found on the State Board of Education website at www.boardofed.idaho.gov. (3-29-12)

0~~8~~7. The Idaho Standards for Infants, Toddlers, Children, and Youth Who Are Deaf or Hard of Hearing. As adopted by the State Board of Education on October 11, 2007. Copies of the document can be found on the State Board of Education website at www.boardofed.idaho.gov. (4-2-08)

0~~9~~8. The Idaho Standards for Infants, Toddlers, Children, and Youth Who Are Blind or Visually Impaired. As adopted by the State Board of Education on October 11, 2007. Copies of the document can be found on the State Board of Education website at www.boardofed.idaho.gov. (4-2-08)

(BREAK IN CONTINUITY OF SECTIONS)

007. DEFINITIONS A - G.

01. Achievement Standards. Define "below basic," "basic," "proficient," and "advanced" achievement levels on the Idaho Standards Achievement Tests (ISAT) and ~~"beginning," "advanced beginning," "intermediate," "early fluent" and "fluent"~~level 1 through level 6 on ~~the~~ Idaho's English ~~L~~language ~~A~~assessment ~~(IELA)~~ by setting scale score cut points. These cut scores are paired with descriptions of how well students are mastering the material in the content standards. These descriptions are called performance level descriptors or PLDs, and are provided by performance level, by content area, and by grade. (4-2-08)

02. Advanced Opportunities. Are defined as Advanced Placement courses, Dual Credit courses, Technical Competency Credit, or International Baccalaureate programs. (3-25-16)

03. Advanced Placement® (AP) - College Board. The Advanced Placement Program is administered by the College Board at http://www.collegeboard.com. AP students may take one (1) or more college level courses in a variety of subjects. AP courses are not tied to a specific college curriculum, but rather follow national College Board curricula. While taking the AP exam is optional, students can earn college credit by scoring well on the national exams. It is up to the discretion of the receiving college to accept the scores from the AP exams to award college credit or advanced standing. (4-11-06)

04. All Students. All students means all public school students, grades K-12. (4-11-06)

05. Alternative Assessment (Other Ways of Testing). Any type of assessment in which students create a response to a question rather than choose a response from a given list, as with multiple-choice or true/false. Alternative assessments can include short-answer questions, essays, oral presentations, exhibitions, and portfolios.

(4-5-00)

06. Assessment. The process of quantifying, describing, or gathering information about skills, knowledge or performance. (4-5-00)

07. Assessment Standards. Statements setting forth guidelines for evaluating student work, as in the "Standards for the Assessment of Reading and Writing." (4-5-00)

08. Asynchronous Course. An online course in which an online platform is used to deliver all curricula. The majority of communication exchanges occur in elapsed time and allow students and teachers to participate according to their schedule. Asynchronous courses do not prohibit the use of a paraprofessional, certificated staff or other staff member being present at the physical location during instructional periods where instruction takes place, such as a school computer lab. (4-4-13)

09. Authentic. Something that is meaningful because it reflects or engages the real world. An "authentic task" asks students to do something they might really have to do in the course of their lives, or to apply certain knowledge or skills to situations they might really encounter. (4-5-00)

10. Basic Educational Skills Training. Instruction in basic skills toward the completion/attainment of a certificate of mastery, high school diploma, or GED. (4-5-00)

11. Classic Texts. Literary or other works (e.g., films, speeches) that have been canonized, either continuously or intermittently, over a period of time beyond that of their initial publication and reception. (4-5-00)

12. Content Standards. Describe the knowledge, concepts, and skills that students are expected to acquire at each grade level in each content area. (4-2-08)

13. Context (of a Performance Assessment). The surrounding circumstances within which the performance is embedded. For example, problem solving can be assessed in the context of a specific subject (such as mathematics) or in the context of a real-life laboratory problem requiring the use of mathematics, scientific, and communication skills. (4-5-00)

14. Cooperative Work Experience. Classroom learning is integrated with a productive, structured work experience directly related to the goals and objectives of the educational program. Schools and participating businesses cooperatively develop training and evaluation plans to guide and measure the progress of the student. School credit is earned for successful completion, and the work may be paid or unpaid. Cooperative work experiences are also known as co-operative education or co-op. (4-5-00)

15. Criteria. Guidelines, rules or principles by which student responses, products, or performances, are judged. What is valued and expected in the student performance, when written down and used in assessment, become rubrics or scoring guides. (4-5-00)

16. Cues. Various sources of information used by readers to construct meaning. The language cueing systems include the graphophonic (also referred to as graphophonemic) system, which is the relationship between oral and written language (phonics); the syntactic system, which is the relationship among linguistic units such as prefixes, suffixes, words, phrases, and clauses (grammar); and semantic system, which is the study of meaning in language. Reading strategies and language cueing systems are also influenced by pragmatics-the knowledge readers have about the ways in which language is understood by others in their culture. (4-5-00)

17. "C" Average. A combined average of courses taken on a four (4) point scale with "C" equal to two (2) points. (4-11-06)

18. Decode. (4-5-00)

a. To analyze spoken or graphic symbols of a familiar language to ascertain their intended meaning. (4-5-00)

b. To change communication signals into messages, as to decode body language. (4-5-00)

19. Dual Credit. Dual credit allows high school students to simultaneously earn credit toward a high school diploma and a postsecondary degree or certificate. Postsecondary institutions work closely with high schools to deliver college courses that are identical to those offered on the college campus. Credits earned in a dual credit class become part of the student's permanent college record. Students may enroll in dual credit programs taught at the high school or on the college campus. (4-11-06)

20. Emergent Literacy. Development of the association of print with meaning that begins early in a child's life and continues until the child reaches the stage of conventional reading and writing. (4-5-00)

21. Employability Skills. Work habits and social skills desirable to employers, such as responsibility, communication, cooperation, timeliness, organization, and flexibility. (4-5-00)

22. Entry-Level Skills. The minimum education and skill qualifications necessary for obtaining and keeping a specific job; the starting point in a particular occupation or with a certain employer. (4-5-00)

23. Evaluation (Student). Judgment regarding the quality, value, or worth of a response, product, or performance based on established criteria, derived from multiple sources of information. Student evaluation and student assessment are often used interchangeably. (4-5-00)

24. Experiential Education (Application). Experiential education is a process through which a learner constructs knowledge, skill, and value from direct experiences. (4-5-00)

25. Exploratory Experience (Similar to a Job Shadow). An opportunity for a student to observe and participate in a variety of worksite activities to assist in defining career goals. An in-school exploratory experience is a school-based activity that simulates the workplace. (4-5-00)

26. Fluency. The clear, rapid, and easy expression of ideas in writing or speaking; movements that flow smoothly, easily, and readily. (4-5-00)

27. Genre (Types of Literature). A category used to classify literary and other works, usually by form, technique, or content. Categories of fiction such as mystery, science fiction, romance, or adventure are considered genres. (4-5-00)

28. Graphophonic/Graphophonemic. One (1) of three (3) cueing systems readers use to construct texts; the relationships between oral and written language (phonics). (4-5-00)

(BREAK IN CONTINUITY OF SECTIONS)

111. ASSESSMENT IN THE PUBLIC SCHOOLS.

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

02. Purposes. The purpose of assessment in the public schools is to: (3-15-02)

a. Measure and improve student achievement; (3-15-02)

b. Assist classroom teachers in designing lessons; (3-15-02)

c. Identify areas needing intervention and remediation, and acceleration; (3-15-02)

d. Assist school districts in evaluating local curriculum and instructional practices in order to make needed curriculum adjustments; (3-15-02)

e. Inform parents and guardians of their child's progress; (3-15-02)

f. Provide comparative local, state and national data regarding the achievement of students in essential skill areas; (3-15-02)

g. Identify performance trends in student achievement across grade levels tested and student growth over time; and (3-15-02)

h. Help determine technical assistance/consultation priorities for the State Department of Education. (3-15-02)

03. Content. The comprehensive assessment program will consist of multiple assessments, including, the Idaho Reading Indicator (IRI), the National Assessment of Educational Progress (NAEP), the Idaho English Language Assessment, the Idaho Standards Achievement Tests (ISAT), the Idaho Alternate Assessment, and a college entrance exam. (3-29-12)

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

a. All students who are eligible for special education shall participate in the statewide assessment program. (4-6-05)

b. Each student's individualized education program team shall determine whether the student shall participate in the regular assessment without accommodations, the regular assessment with accommodations or adaptations, or whether the student qualifies for and shall participate in the alternate assessment. (4-6-05)

c. Limited English Proficient (LEP) students, as defined in Subsection 112.04.d.iv., may receive designated supports or accommodations, or both, for the ISAT assessment if need has been indicated by the LEP student's Educational Learning Plan (ELP) team. The team shall outline the designated supports or accommodations, or both, in an ELP prior to the assessment administration. Designated supports or accommodations, or both, shall be familiar to the student during previous instruction and for other assessments. LEP students who are enrolled in their first year of school in the United States may take ~~the IELA~~ Idaho's English language assessment in lieu of the English language ISAT, but will still be required to take the ISAT (Mathematics and Science). Such LEP students will be counted as participants for the ninety-five percent (95%) participation target, as described in Subsection 112.04. However, such LEP students are not required to be counted for accountability purposes as described in Subsection 112.03. (4-11-15)

05. Scoring and Report Formats. Scores will be provided for each subject area assessed and reported in standard scores, benchmark scores, or holistic scores. Test results will be presented in a class list report of student scores, building/district summaries, content area criterion reports by skill, disaggregated group reports, and pressure sensitive labels as appropriate. Information about the number of students who are eligible for special education who participate in regular and alternate assessments, and their performance results, shall be included in reports to the public if it is statistically sound to do so and would not disclose performance results identifiable to individual students. (4-7-11)

a. Effective April 1, 2009, all students taking the Idaho Standards Achievement Test (ISAT) must have a unique student identifier. (4-7-11)

b. Districts must send all assessment results and related communication to parents within three (3) weeks of receipt from the state. (4-7-11)

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

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

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

c. Grade 2 - Idaho Reading Indicator, Idaho Alternate Assessment, Idaho English Language Assessment. (4-11-15)

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

e. Grade 4 - National Assessment of Educational Progress, Grade 4 Idaho Standards Achievement Tests in English language usage and mathematics,, Idaho Alternate Assessment, Idaho English Language Assessment. (3-29-12)

f. Grade 5 - Grade 5 Idaho Standards Achievement Tests, Idaho Alternate Assessment in English language usage and mathematics,, Idaho English Language Assessment. (3-29-12)

g. Grade 6 - Grade 6 Idaho Standards Achievement Tests, Idaho Alternate Assessment in English language usage and mathematics,, Idaho English Language Assessment. (3-29-12)

h. Grade 7 - Grade 7 Idaho Standards Achievement Tests in English language usage and mathematics,, Idaho Alternate Assessment, Idaho English Language Assessment. (3-29-12)

i. Grade 8 - National Assessment of Educational Progress, Grade 8 Idaho Standards Achievement Tests in English language usage and mathematics,, Idaho Alternate Assessment, Idaho English Language Assessment. (3-29-12)

j. Grade 9 - ~~Grade 9~~High School Idaho Standards Achievement Tests (optional at the discretion of the school district or charter school), Idaho Alternate Assessment, Idaho English Language Assessment. (3-29-12)

k. Grade 10 - High School Idaho Standards Achievement Tests (optional at the discretion of the school district or charter school), Idaho Alternate Assessment, Idaho English Language Assessment. (4-2-08)

l. Grade 11 - High School Idaho Standards Achievement Tests~~ (as applicable)~~, Idaho English Language Assessment, college entrance exam. (4-11-15)

m. Grade 12 - National Assessment of Educational Progress, Idaho English Language Assessment. (4-2-08)

n. Students are required to take an End of Course Assessment in science provided by the state and administered by the district as applicable to the course completed by the students. (4-11-15)

~~**o.** Students who achieve a proficient or advanced score on a portion or portions of the ISAT, or the Idaho Alternate Assessment, offered in their tenth grade year or later are not required to continue taking that portion or portions. (5-8-09)~~

07. **Comprehensive Assessment Program Schedule**. (5-3-03)

a. The Idaho Reading Indicator will be administered in accordance with Section ~~33-1614~~33-1615, Idaho Code. (3-15-02)

b. The National Assessment of Educational Progress will be administered in timeframe specified by the U.S. Department of Education. (3-15-02)

c. The Idaho Standards Achievement Tests will be administered in the Spring in a time period specified by the State Board of Education. (4-11-15)

d. The Idaho Alternate Assessment will be administered in a time period specified by the State Board of Education. (4-2-08)

e. ~~The~~ Idaho's English Language Assessment will be administered in a time period specified by the State Board of Education. (4-2-08)

08. **Costs Paid by the State**. Costs for the following testing activities will be paid by the state: (4-1-97)

a. All consumable and non-consumable materials needed to conduct the prescribed statewide comprehensive assessment program; (3-15-02)

b. Statewide distribution of all assessment materials; and (3-29-12)

c. Processing and scoring student response forms, distribution of prescribed reports for the statewide comprehensive assessment program. (3-29-12)

09. **Costs of Additional Services**. Costs for any additional administrations or scoring services not included in the prescribed statewide comprehensive assessment program will be paid by the participating school districts. (3-15-02)

10. **Services**. The comprehensive assessment program should be scheduled so that a minimum of instructional time is invested. Student time spent in testing will not be charged against attendance requirements. (3-15-02)

11. **Test Security, Validity and Reliability**. Test security is of the utmost importance. To ensure integrity of secure test items and protect validity and reliability of test outcomes, test security must be maintained. School districts will employ security measures in protecting statewide assessment materials from compromise. Each individual who has any opportunity to see test items must sign a state-provided confidentiality agreement, which the district must keep on file in the district for at least two (2) years. Documentation of security safeguards must be available for review by authorized state and federal personnel. (4-2-08)

~~**a.** All ISAT paper and pencil test booklets will be boxed and shipped to the test vendor to be counted no later than two (2) weeks after the end of the testing window, as applicable. (4-11-15)~~

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

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

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

a. The Idaho Standards Achievement Tests (grades 3-~~9~~8 and High School). (3-29-12)

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

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

ii. Math. (3-15-02)

iii. Science. (3-15-02)

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

v. Health. (3-15-02)

vi. Humanities. (3-15-02)

112. ACCOUNTABILITY

~~The provisions in this section apply for the purposes of meeting the "No Child Left Behind" Act and the state of Idaho accountability requirements. (3-20-04)~~

School district, charter school district and public charter school accountability will be based on multiple measures aimed at providing meaningful data showing progress toward interim and long-term goals set by the State Board of Education for student achievement and school improvement. The state accountability framework will be used to meet both state and federal school accountability requirements and will be broken up by school category and include measures of student academic achievement and school quality as determined by the State Board of Education.

01. School Category.

a. Kindergarten through grade 8 (K-8), Schools in this category include elementary and middle schools as defined in section 05.f.

b. High Schools, not designated as alternative high schools, as defined in section 05.f

c. Alternative high schools.

02. Academic measures by school category

a. K-8

i. Idaho Standards Achievement Tests (ISAT) Proficiency

ii. ISAT growth

iii. ISAT proficiency gap

iv. Idaho statewide reading assessment

v. English Learners achieving English language proficiency

b. High school

i. ISAT proficiency

ii. English Learners achieving English language proficiency

iii. Four (4) year cohort graduation rate

c. Alternative high school

i. ISAT proficiency

ii. English Learners achieving English language proficiency

iii. Four (4) year cohort graduation rate

iv. Five (5) year cohort graduation rate

03. School quality measures by school category

a. K-8

i. Next grade level readiness index

ii. Chronic Absenteeism
iii. Teacher quality and engagement index
b. High school
i. College and career readiness index
ii. Chronic Absenteeism
iii. Teacher quality and engagement index
c. Alternative high school
i. Credit recovery and accumulation
ii. Chronic absenteeism
iii. Teacher quality and engagement index
iv. Student engagement index

04. Reporting. Methodologies for reporting measures and determining indexes will be set by the State Board of Education.

05. Annual Measurable Progress Definitions. For purposes of calculating and reporting progress, the following definitions shall be applied.

~~01~~a. ISAT Student Achievement Levels. There are four (4) levels of student achievement for the ISAT: Below Basic, Basic, Proficient, and Advanced. Definitions for these levels of student achievement are adopted by reference in Subsection 004.05. (4-2-08)

~~02~~b. ~~IELA~~ Idaho's English Language Assessment Proficiency Levels. There are ~~five~~ six (~~5~~6) levels of language proficiency for students testing on the Idaho English Language Assessment: ~~beginning," advanced beginning, intermediate, early fluent, and fluent~~Level 1, Level 2, Level 3, Level 4, Level 5 and Level 6. Definitions for these levels of language proficiency are adopted by reference in Subsections 004.02 and 004.04. (4-2-08)

~~03~~c. ~~Adequate Yearly Progress (AYP).~~Annual Measurable Progress (3-20-04)

~~a~~i. ISAT Proficiency is defined as the number of students scoring proficient or advanced on the spring on-grade level ISAT. (3-20-04)

~~b~~ii. The State Department of Education will make ~~AYP~~ determinations for schools and districts each year. Results will be given to the districts at least one (1) month prior to the first day of school. (4-7-11)

~~c~~iii. The State Board of Education will set long-term goals and measurements of interim progress targets toward those goals. The baseline for ~~AYP~~ determining measurable student progress will be set by the State Board of Education and shall identify the amount of growth (percentage of students reaching proficiency) required for each intermediate period. (3-20-04)

~~**04. Adequate Yearly Progress (AYP) Definitions**. For purposes of calculating and reporting adequate yearly progress, the following definitions shall be applied. (3-20-04)~~

d~~a~~. Full Academic Year (continuous enrollment). (3-20-04)

i. A student who is enrolled continuously in the same public school from the end of the first eight (8) weeks or fifty-six (56) calendar days of the school year through the state approved spring testing administration period, not including the make-up portion of the test window, will be included in the calculation to determine if the school achieved ~~AYP in~~progress in any statewide assessment used for determining proficiency. A student is continuously enrolled if he/she has not transferred or dropped-out of the public school. Students who are serving suspensions are still considered to be enrolled students. (4-7-11)

ii. A student who is enrolled continuously in the school district from the first eight (8) weeks or fifty-six (56) calendar days of the school year through the state approved spring testing administration period, not including the make-up portion of the test window, will be included when determining if the school district has achieved AYP. (4-2-08)

iii. A student who is enrolled continuously in a public school within Idaho from the end of the first eight (8) weeks or fifty-six (56) calendar days of the school year through the state approved spring testing administration period, not including the make-up portion of the test window, will be included when determining if the state has achieved ~~AYP~~ progress in any statewide assessment used for determining. (4-2-08)

~~b~~e. Participation Rate. (3-20-04)

i. Failure to include ninety-five percent (95%) of all students and ninety-five percent (95%) of students in designated subgroups automatically identifies the school as not having achieved ~~AYP~~measurable progress in ISAT proficiency. 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 for the Spring ISAT. (3-20-04)

(1) 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 current three (3) year average of participation. (4-6-05)

(2) Students who are absent for the entire state-approved testing window because of medical reasons or are homebound are exempt from taking the ISAT if such circumstances prohibit them from participating. Students who drop out, withdraw, or are expelled prior to the beginning of the final makeup portion of the test window are considered exited from the school. (4-7-11)

ii. 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. (3-20-04)

~~c~~f. Schools. As used in this section schools refers to any school within a school district or charter school district and public charter schools. (3-20-04)

i. An elementary school includes a grade configuration of grades Kindergarten (K) through six (6) inclusive, or any combination thereof. (3-20-04)

ii. A middle school is a school that does not meet the definition of an elementary school and contains grade eight (8) but does not contain grade twelve (12). (4-6-05)

iii. A high school is any school that contains grade twelve (12). (3-20-04)

iv. An alternative high school is any school that contains grade twelve and meets the requirements of section 110 of these rules.

iv. The accountability of public schools without grades assessed by this system (i.e., K-2 schools) will be based on the third grade test scores of the students who previously attended that feeder school. (3-20-04)

v. A “new school” for purposes of accountability is a wholly new entity receiving ~~AYP~~ annual measurable progress determinations for the first time, or a school with a significant student population change as a result of schools being combined or geographic boundaries changing, or a result of successful school restructuring sanctioned by the Office of the State Board of Education. (4-7-11)

~~d~~g. Subgroups. Scores on the ISAT must be disaggregated and reported by the following subgroups: (3-20-04)

i. Race/Ethnicity - Black/African American, Asian, Native Hawaiian/Pacific Islander, White, Hispanic/Latino Ethnicity, American Indian/Alaska Native. (3-20-04)

ii. Economically disadvantaged - identified through the free and reduced lunch program. (3-20-04)

iii. Students with disabilities - individuals who are eligible to receive special education services through the Individuals with Disabilities Education Act (IDEA). (3-20-04)

iv. Limited English Proficient - individuals who do not score proficient on the state-approved language proficiency test and meet one (1) of the following criteria: (4-11-15)

(1) Individuals whose native language is a language other than English; or (4-6-05)

(2) Individuals who come from environments where a language other than English is dominant; or (4-6-05)

(3) Individuals who are American Indian and Alaskan natives and who come from environments where a language other than English has had a significant impact on their level of English language proficiency, and who, by reason thereof, have sufficient difficulty speaking, reading, writing, or understanding the English language to deny such individuals the opportunity to learn successfully in classrooms, where the language of instruction is English. (4-6-05)

~~e~~h. Graduation Rate. The graduation rate will be based on the rate of the cohort of students entering grade 9 during the same academic year and attending or exiting the school with a four (4) year or five year period (5) as applicable to the measure being determined. In determining the graduation cohort the school year shall include the summer term immediately following the fall and spring term. School districts may only report students as having graduated if the student has met, at a minimum, the state graduation requirements and will not be returning to the school in following years to complete academic course work. The State Board of Education will establish a target for graduation. All high schools must meet the target or make sufficient progress toward the target each year, as determined by the State Board of Education. The graduation rate will be disaggregated by the ~~subpopulations~~ subgroups listed in Subsection 112.04.d. ~~in the event the "safe harbor" is invoked by the school/district~~. (4-7-11)

~~f~~i. Additional Academic Indicator. The State Board of Education will establish a target for ~~an~~all additional academic and school quality measures~~indicator~~. All ~~elementary and middle~~ schools must maintain or make progress toward the additional academic and school quality ~~indicator~~measure target each year. The additional academic and school quality ~~indicator~~ measure targets will be disaggregated by the subpopulations listed in Subsection 112.04.d. ~~in the event the "safe harbor" is invoked by the school/district. By 2014, the schools/districts must meet the target.~~ (3-20-04)

~~05~~06. Annual Measurable Achievement Objectives (AMAOs). Local school districts are responsible for ensuring district progress of Limited English Proficient (LEP) students in their acquisition of English. Progress and proficiency are measured by ~~the IELA~~ Idaho's English language assessment and determined based on three (3) AMAOs: (4-2-08)

a. Annual increases in the percent or number of LEP students making progress in acquiring English language proficiency; (4-2-08)

b. Annual increases in the percent or number of LEP students attaining English language proficiency by the end of the school year; and (4-2-08)

c. Each school district must make Adequate Yearly Progress for LEP students on the spring ISAT. (4-2-08)

~~113. REWARDS.~~

~~**01. Distinguished Schools**. Distinguished School Awards are designed to recognize the highest performing schools. A school shall be recognized as a "Distinguished School" based on the following criteria: (3-20-14)~~

~~**a.** Achieved a Five-Star Rating for at least two (2) out of the last three (3) years; (3-20-14)~~

~~**b.** Received no less than a Four-Star Rating in the last three years; (3-20-14)~~

~~**c.** Meet the Annual Measurable Objectives (AMOs) in all subjects for overall students and all~~

~~subgroups as outlined in Subsection 112.04.d. (3-20-14)~~

~~**d.** Be among the top five percent (5%) of schools in all students proficiency; and (3-20-14)~~

~~**e.** Be among the top ten percent (10%) of schools in the proficiency gaps between the highest and lowest achieving subgroups and between the at-risk and not at-risk subgroups. (3-20-14)~~

~~**02. Determination by State Department of Education**. The State Board of Education will determine the schools eligible for the Distinguished School award each year based upon the criteria outlined in Subsection 113.01. The State Department of Education will provide the list of schools meeting the specified criteria to the State Board of Education no later than August 30th of each year. The State Board of Education will recognize the schools no later than the annual October Board Meeting. (3-20-14)~~

114. FAILURE TO MEET ~~ADEQUATE YEARLY PROGRESS (AYP).~~ANNUAL MEASURABLE PROGRESS

01. Compliance with Federal Law. All schools and local educational agencies in this state shall comply with applicable federal laws governing specific federal grants. (4-6-05)

a. With respect to schools and local educational agencies in this state that receive federal grants under title I of the Elementary and Secondary Education Act of 1965, as amended by the ~~No Child Left Behind Act of 2001~~Every Child Succeeds Act of 2015 (Title I schools), the State Department of Education shall develop procedures for approval by the State Board of Education, consistent with federal law, that describe actions to be taken by local educational agencies and schools in this state in regard to schools that fail to meet ~~AYP~~interim and long-term progress goals. (4-6-05)

b. With respect to schools and local educational agencies in this state that do not receive federal grants under Title I of the Elementary and Secondary Education Act of 1965, as amended by the ~~No Child Left Behind Act of 2001~~Every Child Succeeds Act of 2015, such non-Title I schools and local educational agencies shall be required to comply with federal law and state requirements with the procedures relating to failure to meet ~~AYP~~ interim and long-term progress goals as provided in Subsection 114.01.a. of this rule, as if they were Title I schools, except that any provisions relating to the use of federal grants to pay for such expenses shall not be applicable to such non-Title I schools and local educational agencies. In such event, non-title I schools shall be required to fund such compliance costs from general operating funds. (4-6-05)

02. State Department of Education. With respect to the implementation of duties responsibilities described under Title I of the Elementary and Secondary Education Act of 1965, as amended by the ~~No Child Left Behind Act of 2001~~Every Student Succeeds Act of 2010, that are applicable to a state educational agency, the State Department of Education shall perform such duties and responsibilities, including, but not limited to, making technical assistance available to local educational agencies that fail to meet ~~AYP as required under federal law~~interim and long-term goals, and for providing technical assistance, developing improvement plans, and providing for mandatory corrective actions to local educational agencies as required under federal law and state law. (4-6-05)

SUBJECT

Proposed Rule IDAPA 08.02.05, Rules Governing Pay for Success Contracting

APPLICABLE STATUTE, RULE, OR POLICY

Section 33-125B, Idaho Code

BACKGROUND/DISCUSSION

Section 33-125B, Idaho Code was enacted by HB 170 (2015), the purpose of the legislation was to provide for an alternative means of fostering innovation in Idaho's schools, and to allow for a method by which the state could enter into an agreement with a private entity; whereby the entity bears the sole burden of financing the cost of a program up front and the state pays based on outcomes that are negotiated prior to entering into the contract. Section 33-125B, Idaho Code, additionally, establishes an oversight committee to review the proposal and indicate whether or not the Department of Education should commence negotiations. The oversight committee is made up of:

- The Chief Financial Officer for the Department of Education,
- The subject matter expert at the Department of Education,
- A representative from the State Controller's Office,
- The House of Representatives Education Committee Chairman, and
- The Senate Education Committee Chairman.

During the first year the program was available, one vendor submitted a proposal to the Department of Education based on feedback from this process it was determined that at a minimum submittal processes and timelines should be established in administrative rule.

The proposed rule would create an entirely new section of rule pertaining to Pay for Success Contracting. The rule will include information on where to submit the requests, and timelines for review of the request by the oversight committee

IMPACT

Approval of the proposed rule will set out the application process for vendors wishing to participate in the Pay for Success Contracting with the state.

ATTACHMENTS

Attachment 1 – Proposed Rule changes to IDAPA 08.02.05 Page 3

STAFF COMMENTS AND RECOMMENDATIONS

Proposed rules have a 21 day comment period prior to becoming pending rules. Based on received comments and Board direction, changes may be made to proposed rules prior to entering the Pending stage. All pending rules will be brought back to the board for approval prior to submittal to the Department of Administration for publication in the Idaho Administrative Rules Bulletin as a pending rule. Pending rules become effective at the end of the legislative session in which they are submitted.

BOARD ACTION

I move to approve the proposed rule IDAPA 08.02.05, as submitted in Attachment 1.

Moved by __________ Seconded by __________ Carried Yes _____ No _____

IDAPA 08
TITLE 02
CHAPTER 05

08.02.05 – RULES GOVERNING PAY FOR SUCCESS CONTRACTING

000. LEGAL AUTHORITY.
In accordance with Sections 33-125B(8), Idaho Code, the State Board of Education may promulgate rules implementing the provisions of Section 33-125B, Idaho Code.

001. TITLE AND SCOPE.

01. Title. These rules shall be cited as IDAPA 08.02.05, "Rules Governing Pay for Success Contracting."

02. Scope. These rules constitute the requirements for Pay for Success Contracting.

002. WRITTEN INTERPRETATIONS.
In accordance with Section 67-5201(19)(b)(iv), Idaho Code, written interpretations, if any, of the rules of this chapter are available at the Board.

003. ADMINISTRATIVE APPEALS.
Unless otherwise provided for in the rules of the Board or in the Board Governing Policies and Procedures, all administrative appeals allowed by law shall be conducted as provided herein.

004. INCORPORATION BY REFERENCE.
There are no documents that have been incorporated by reference into these rules.

005. OFFICE INFORMATION.

01. State Department of Education Office Hours and Contact Information. The offices of the Department are open from 8 a.m. to 5 p.m., except Saturday, Sunday, and legal holidays.

i. Street Address. The offices of the Department are located at 650 W. State Street, Boise, Idaho.

ii. Mailing Address. The mailing address of the Department is P.O. Box 83720, Boise, Idaho 83720-0027.

iii. Electronic Address. The electronic address of the Department of Education is www.sde.idaho.gov.

iv. Telephone Number. The telephone number of the Department is (208) 332-6800.

v. Facsimile. The facsimile number of the Department is (208) 334-2228.

006. PUBLIC RECORDS ACT COMPLIANCE.
These rules are subject to the provisions of the Idaho Public Records Act, Title 74, Chapter 1, Idaho Code.

007. -- 009. (RESERVED)

010. DEFINITIONS.

01. Board. The State Board of Education

02. Department. The State Department of Education

03. Oversight Committee. Committee formed pursuant to Section 33-125B(6), Idaho Code to evaluate pay for success contracting proposals.

04. Pay for Success Contracting. Contracting for services with private entities whereby services are reimbursed based on the achievement of outcomes pursuant to Section 33-125B, Idaho Code.

011. -- 100. (RESERVED)

101. INITIATING CONTRACTING. Contracting may be initiated through two (2) separate routes.

01. Initiated by Department. The Department may issue~~s~~ a request for information upon identification of a need for a service, or

02. Initiated by Interested Party. An interested party or service provider may identify a need for service and submit a proposal to the State Department of Education. Proposals must include a letter of intent to participate in a pay for success contract and must include the following information:

a. Special service(s) that the service provider will provide;

b. How the services will enhance student academic achievement;

c. Source of education funding from which savings will be realized;

d. Identity of one or more qualified external evaluators;

e. Provide external evaluator's qualifications and expertise as required pursuant to section 33-125B, Idaho Code; and

f. Identify local education agencies (LEA) that have expressed interest in participating in the service and documentation that LEA meets the requirements pursuant to section 33-125B, Idaho Code.

03. Additional Information. As part of the review process the oversight committee may request additional information.

04. Format. Proposals may be submitted in electronic or hard copy format.

102. PROPOSAL EVALUATION

01. Timeline.

a. Within five (5) business days of receipt of the complete proposal, the proposal will be forwarded electronically to the oversight committee.

b. After receiving the proposal the oversight committee will determine if additional information is needed to evaluate the proposal. The oversight committee will request additional information from the interested party within thirty (30) days of receiving the initial proposal.

c. The interested party shall respond to a request for additional information within fifteen (15) days of receiving the request.

i. Requests for additional response time may be granted at the discretion of the oversight committee.

ii. If the interested party fails to respond or additional information is not received within the specified time, the oversight committee may reject the proposal without further consideration.

d. The oversight committee shall hold an initial meeting either in-person, telephonically or by other means to consider the merits of the proposal within forty-five (45) days of receipt of the proposal.

e. The oversight committee chair shall inform the Department designated staff person, and the interested party, of its decision on a proposal within ninety (90) days of receipt of the complete proposal.

02. Oversight committee action. Following consideration of a proposal, the oversight committee shall take one of the following actions:

a. require the Department to start negotiations with the interested party,

b. require the Department to start negotiations with the interested party, subject to conditions imposed by the oversight committee,

c. reject the proposal with suggestions for improving the proposal prior to considering resubmittal, or

d. reject the proposal.

03. Proposal resubmittal. Proposals that have been rejected may be resubmitted for consideration if amendments have been made to the proposal or additional information has been added for the oversight committee's consideration.

103. CONTRACT NEGOTIATIONS.

01. Negotiation Teams. Contract negotiations for accepted proposals shall involve the following individuals:

a. The Department chief budget officer or designee,

b. One or more individuals with a background in complex financial instruments,

c. One or more individuals with a background in complex financial instruments, at least one of which will be from the state treasurer's office or the state endowment fund board,

d. One or more financial officers from a local education agency. In the event a local education agency has already been identified to participate in the proposal, the chief financial officer for the local education agency shall participate.

e. One or more individuals representing the interested party.

03. Negotiation Timeline. Negotiations shall be completed within ninety (90) days unless extended by the oversight committee. To be extended by the oversight committee, the committee must determine that all parties have made a best effort to negotiate the contract.

02. Negotiation Updates. The Department shall provide regular contract negotiation updates to the oversight committee, not less than every thirty (30) days during contract negotiations. Failure to negotiate mutually agreeable terms within ninety (90) days shall be reported to the oversight committee. The committee may extend the timeline for negotiations, appoint a new negotiations team or terminate the negotiations.

03. Time Tracking. State employees' time spent on the evaluation or negotiation shall be tracked and recorded on a per proposal basis and be provided to the oversight committee, or to other interested parties upon request.

104. Contract Monitoring. Contract monitoring reports will be submitted to the oversight committee by the Department in a timeline and format established by the oversight committee.

UNIVERSITY OF IDAHO

SUBJECT

Proposed Rule IDAPA 08.05.01, Rules Governing Seed and Plant Certification

REFERENCE

May 14, 2014	Board approved seed certification standards and temporary and proposed rule, IDAPA 08.05.01, Rules Governing Seed and Plant Certification - as presented.
August 14, 2014	Board approved pending rule, IDAPA 08.05.01.
April 16, 2015	Board approved amendment to seed certification standards.
May 20, 2015	Board approved temporary rule amendments to IDAPA 08.05.01 incorporating amended seed certification standards.
August 13, 2015	Board approved proposed rule changes to IDAPA 08.05.01 incorporating amended seed certification standards.
November 30, 2015	Board approved pending rule IDAPA 08.05.01, Rules Governing Seed and Plant Certification

APPLICABLE STATUTE, RULE, OR POLICY

Title 22 Chapter 15, specifically Sections 22-1504 and 22-1505, Idaho Code.
Idaho Administrative Code, IDAPA 08.05.01, Rules Governing Seed and Plant Certification.

BACKGROUND/DISCUSSION

During the 2014 calendar year, the University of Idaho and the Board took action to address compliance within statutory requirements related to certification of seeds, tubers, plants and plant parts in the state of Idaho as contained in the Seed and Plant Certification Act of 1959 (Idaho Code Title 22 Chapter 15). The Board's action entailed incorporating into Board rules, by reference, the existing published Standards for Certification of the Idaho Crop Improvement Association, Inc. (ICIA). These existing published standards were created through a long established process involving the ICIA Board working in conjunction with committees for the various seed crops, composed of individuals representing the seed growers and processors, to create and then continuously update the standards. Standards, and any revisions to existing standards, are then presented to the Foundation Seed Stock Committee within the Agriculture Experiment Station at the University of Idaho for approval and then presented for approval by the University's Director of the Agriculture Experiment Station.

Through the ICIA's annual review process, the ICIA identified an amendment to the Rapeseed/Canola/ Mustard Certification Standards that would help to make these seeds produced in Idaho be more competitive. The proposed amendment would add to this specific standard the need to test these seeds for Sclerotinia bodies.

IMPACT

Approval of the amendment as a proposed rule will allow the rule to move forward through the rulemaking process, making the changes permanent.

ATTACHMENTS

Attachment 1 – Proposed Rule – IDAPA 08.05.01	Page 5
Attachment 2 – Standards for Seed and Plant Certification	Page 7
Attachment 3 – ICIA Review Notification	Page 11

STAFF COMMENTS AND RECOMMENDATIONS

Fees paid to the Idaho Crop Improvement Association, Inc. cover the cost of testing, the ICIA has determined that the additional test can be covered under the current fee structure.

Proposed rules have a 21 day comment period prior to becoming pending rules. Based on received comments and Board direction, changes may be made to proposed rules prior to entering the pending stage. If approved, pending rules will be submitted to the Department of Administration for publication in the Idaho Administrative Rules Bulletin and are then forwarded to the legislature for consideration. Pending rules become effective at the end of the legislative session in which they are submitted if they are not rejected by the Legislature.

Staff recommends approval.

BOARD ACTION

I move to approve changes to proposed rule IDAPA 08.05.01, as presented in Attachment 1.

Moved by __________ Seconded by __________ Carried Yes _____ No _____

IDAPA 08
TITLE 05
CHAPTER 01

08.05.01 - RULES GOVERNING SEED AND PLANT CERTIFICATION

1. LEGAL AUTHORITY.
This chapter is adopted under the authority of Title 22, Chapter 15, Idaho Code. (4-6-15)

2. TITLE AND SCOPE.

1. Title. The title of this chapter is IDAPA 08.05.01, "Rules Governing Seed and Plant Certification," by Idaho Crop Improvement Association, Inc. (4-6-15)

2. Scope. These rules shall govern the standards and procedures for the certification of seeds, tubers, plants, or plant parts in the state of Idaho by the Regents of the University of Idaho through the Idaho Agricultural Experiment Station in the College of Agricultural and Life Sciences and its duly authorized agent, Idaho Crop Improvement Association, Inc., as an agent and instrumentality and servant of the State. (4-6-15)

3. WRITTEN INTERPRETATIONS.
In accordance with Section 67-5201(19)(b)(iv), Idaho Code, any written interpretations of the rule of this chapter will be made available at the Idaho State Board of Education office. (4-6-15)

4. ADMINISTRATIVE APPEAL.
There is no provision for administrative appeals before the Board under this chapter. Hearing and appeal rights are set forth in Title 67, Chapter 52, Idaho Code. (4-6-15)

5. INCORPORATION BY REFERENCE.
The following documents are incorporated by reference into this rule. The Idaho Seed and Plant Certification Standards are adopted by the Idaho Crop Improvement Association. Copies of the following documents may be obtained from the Idaho Crop Improvement Association, Inc. website at http://www.idahocrop.com/index.aspx, or from the Idaho Crop Improvement Association, Inc. office. (4-6-15)

1. Prohibited Noxious Seed in Idaho Certified Seed. The standard Prohibited Noxious Seed in Idaho Certified Seed of the Idaho Crop Improvement Association, Inc., as last modified and approved on March 17, 2015. (3-25-16)

2. Seed Certification Fee & Application Schedule. The Seed Certification Fee and Application Schedule of the Idaho Crop Improvement Association, Inc., as last modified and approved on July 11, 2014. (4-6-15)

3. Idaho Alfalfa Certification Standards. The Idaho Alfalfa Certification Standards adopted by the Idaho Crop Improvement Association, Inc., as last modified and approved on March 17, 2015. (3-25-16)

4. Idaho Bean Certification Standards. The Idaho Bean Certification Standards adopted by the Idaho Crop Improvement Association, Inc., as last modified and approved on March 17, 2015. (3-25-16)

5. Idaho Red Clover Certification Standards. The Idaho Red Clover Certification Standards adopted by the Idaho Crop Improvement Association, Inc., as amended and approved on March 17, 2015. (3-25-16)

6. Idaho Chickpea Certification Standards. The Idaho Chickpea Certification Standards adopted by the Idaho Crop Improvement Association, Inc., as amended and approved on March 17, 2015. (3-25-16)

7. Idaho Grain Certification Standards. The Idaho Grain Certification Standards adopted by the Idaho Crop Improvement Association, Inc., as amended and approved on March 17, 2015. (3-25-16)

8. Idaho Grass Certification Standards. The Idaho Grass Certification Standards adopted by the Idaho Crop Improvement Association, Inc., as amended and approved on March 17, 2015. (3-25-16)

9. Idaho Rapeseed/Canola/Mustard Certification Standards. The Idaho Rapeseed/Canola/Mustard Certification Standards adopted by the Idaho Crop Improvement Association, Inc., as amended and approved on ~~March 17, 2015~~April 26, 2016. (3-25-16)

10. Idaho Potato Certification Standards. The Idaho Potato Certification Standards adopted by the Idaho Crop Improvement Association, Inc., as amended and approved on March 17, 2015. (3-25-16)

11. Pre-Variety Germplasm Certification Regulations in Idaho. The Pre-variety Germplasm Certification Regulations adopted by the Idaho Crop Improvement Association, Inc., as amended and approved March 17, 2015. (3-25-16)

12. Idaho Lentil Certification Standards. The Idaho Lentil Certification Standards adopted by the Idaho Crop Improvement Association, Inc., as amended and approved March 17, 2015. (3-25-16)

13. Idaho Blue Flax Certification Standards. The Idaho Blue Flax Certification Standards adopted by the Idaho Crop Improvement Association, Inc., as amended and approved March 17, 2015. (3-25-16)

14. Idaho Milkvetch Certification Standards. The Idaho Milkvetch Certification Standards adopted by the Idaho Crop Improvement Association, Inc., as amended and approved March 17, 2015. (3-25-16)

15. Idaho Pea Certification Standards. The Idaho Pea Certification Standards adopted by the Idaho Crop Improvement Association, Inc., as amended and approved March 17, 2015. (3-25-16)

16. Idaho Sanfoin Certification Standards. The Idaho Sanfoin Certification Standards adopted by the Idaho Crop Improvement Association, Inc., as amended and approved March 17, 2015. (3-25-16)

17. Idaho Birdsfoot Trefoil Certification Standards. The Idaho Birdsfoot Trefoil Certification Standards adopted by the Idaho Crop Improvement Association, Inc., as amended and approved March 17, 2015. (3-25-16)

18. Idaho White Clover Certification Standards. The Idaho White Clover Certification Standards adopted by the Idaho Crop Improvement Association, Inc., as amended and approved March 17, 2015. (3-25-16)

19. Idaho Penstemon Certification Standards. The Idaho Penstemon Certification Standards adopted by the Idaho Crop Improvement Association, Inc., as amended and approved March 17, 2015. (3-25-16)

6. OFFICE -- OFFICE HOURS -- MAILING ADDRESS AND STREET ADDRESS.

1. Physical Addresses. The main office of the Idaho Crop Improvement Association, Inc. is located at 429 SW 5th Avenue, Suite 105, Meridian, ID 83642. The branch offices are located at: 1680 Foote Drive, Idaho Falls, ID 83402; 5920 N Government Way, Suite 10, Dalton Gardens, ID 83815; 2283 Wright Avenue, Suite C, Twin Falls, ID 83303. (4-6-15)

2. Office Hours. Office hours are 8 a.m. to 5 p.m., Mountain Time, Monday through Friday, except holidays. These office hours apply to each branch. (4-6-15)

3. Mailing Addresses. The mailing address for the Idaho Crop Improvement Association, Inc. main office is 429 SW 5th Avenue, Suite 105, Meridian, ID 83642. The branch offices mailing addresses are: 1680 Foote Drive, Idaho Falls, ID 83402; 5920 N Government Way, Suite 10, Dalton Gardens, ID 83815; 2283 Wright Avenue, Suite C, Twin Falls, ID 83303. (4-6-15)

4. Telephone Numbers. The telephone number for the Idaho Crop Improvement Association, Inc. main office is (208) 884-8225. The telephone numbers for the branches are: Idaho Falls (208) 522-9198; Dalton Gardens (208) 762-5300; Twin Falls (208) 733-2468. (4-6-15)

5. Fax Numbers. The fax number for the Idaho Crop Improvement Association Inc. main office is (208) 884-4201. The fax numbers for the branches are: Idaho Falls (208) 529-4358; Dalton Gardens (208) 762-5335;

Twin Falls (208) 733-4803. (4-6-15)

6. PUBLIC RECORDS ACT COMPLIANCE.
These rules are public records available for inspection and copying at the Idaho Crop Improvement Association Inc., and the State Law Library. (4-6-15)

7. -- 009. (RESERVED)

10. DEFINITIONS.
In addition to the definitions set forth in Title 22, Chapter 15, Idaho Code, the definitions found in the standards of the Idaho Crop Improvement Association, Inc., incorporated by reference in Section 004 of these rules, shall apply to these rules. (4-6-15)

11. (RESERVED)

12. APPLICABILITY.
These rules shall apply to all seeds, tubers, plants, or plant parts located in, imported into, or exported from the state of Idaho that have an application for certification properly filed with a seed certification agency. (4-6-15)

13. OFFICIAL IN CHARGE OF CERTIFIED SEED.
The Idaho Legislature, at its 35th Session, enacted Senate Bill No. 107, the "Seed and Plant Certification Act of 1959". This Act designated the Regents of the University of Idaho, through the Agricultural Experiment Station of the College of Agriculture, as the seed certifying agency for the State. This Act further gives the Regents of the University of Idaho the authority to designate an agent to administer and conduct the certification program. The Regents of the University of Idaho on April 27, 1959, appointed the Idaho Crop Improvement Association, Inc., as its duly authorized agent to administer and conduct seed certification in Idaho as provided by the Seed and Plant Certification Act of 1959. (4-6-15)

14. SEED CERTIFICATION FEE AND APPLICATION SCHEDULE.
The Idaho Crop Improvement Association may assess a fee to defray the costs of seed testing and administration of the seed certification program. Fees are established through the Idaho Crop Improvement Association, Inc. (4-6-15)

15. -- 999. (RESERVED)

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Idaho Rapeseed/Canola/Mustard Certification Standards (rev. 3/17/2015)(Draft rev. 3/2016)

Land Requirements:

Class Planted	**Class Produced**	**Years that field must be free from *Brassica* crop**
Breeder seed	Foundation seed	5
Breeder or Foundation	Certified seed	3

Isolation Requirements:

A field producing foundation seed must have the minimum isolation distance from fields of any other variety or species, or fields of the same variety that do not meet the varietal purity requirements for certification, as given in the following table:

	B. napus			
B. napus	1,320 feet	***B. rapa***		
B. rapa	660 feet	1,320 feet	***B. juncea***	
B. juncea	20 feet	20 feet	1,320 feet	***S. alba***
S. alba	20 feet	20 feet	20 feet	1,320 feet

A field producing certified seed must have the minimum isolation distance from fields of any other variety or species, or fields of the same variety that do not meet the varietal requirements for certification, as given in the following table:

	B. napus			
B. napus	660 feet	***B. rapa***		
B. rapa	330 feet	660 feet	***B. juncea***	
B. juncea	10 feet	10 feet	660 feet	***S. alba***
S. alba	10 feet	10 feet	10 feet	660 feet

Field Standards:

Species	Foundation Seed		Certified Seed	
	Other Brassica's 1	**Other * Varieties 2**	**Other Brassica's**	**Other Varieties**
B. napus	2/acre	None 2	4/acre	1%
B. rapa	2/acre	None	4/acre	1%
B. juncea	2/acre	None	4/acre	1%
S. alba	2/acre	None	4/acre	2%

* Other varieties shall be considered to include off-type plants and plants that can be differentiated from the variety being inspected.

1 Other Brassica's ***Brassica*** species other than crop being inspected.

2 None means *none found during the normal inspection procedures*.

Seed Standards:

Factor	Standards from each class	
	Foundation	**Certified**
Pure Seed (Min.)	99%	99%
Other Crops (Max.)	1/50 grams	2/50 grams
Inert Matter (Max.)	1%	1%
Weed Seed (Max.)	10/50 grams	20/50 grams
Prohibited Noxious Weeds **1**	None	None
Objectionable Weeds (Max.) **2**	1/50 grams	2/50 grams
Seed Analysis **3**	See footenote 3	See footenote 3
Sclerotinia bodies	~~None~~ 1/50 grams	~~None~~ 1/50 grams
Leptosphaeria maculans /Phoma lingum (Blackleg)	0.01%	0.01%

Germination (Min.)	85%	85%

1 None means none found during normal inspection procedures.

2 Objectionable weed seeds are defined as: Restricted noxious plus *Brassica* species other than crop being inspected, and *Galium aparine* (Bedstraw).

3 Erucic acid and glucosinolate content must be within tolerances as described by the plant breeder for each variety.

4 All seed lots for which certification is applied shall be assayed for virulent Phoma lingam/Leptosphaeria maculans (Blackleg) and shown to be 99.99% free of this seed borne fungi.

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University of Idaho
College of Agricultural and Life Sciences

Foundation Seed Program
875 Perimeter Drive MS 2090
Moscow, ID. 83844-2090

Phone: 208-885-7333
seed@uidaho.edu
dhoadley@uidaho.edu

Date: April 26, 2016
To: Mark McGuire, Director IAES
From: David Hoadley, Director UI-FSP

Subject: Proposed Canola, Rapeseed, Mustard (as submitted)
Sclerotinia Bodies Tolerances

Factor	Standards from each class	
	Foundation	**Certified**
Pure Seed (Min.)	99%	99%
Other Crops (Max.)	1/50 grams	2/50 grams
Inert Matter (Max.)	1%	1%
Weed Seed (Max.)	10/50 grams	20/50 grams
Prohibited Noxious Weeds **1**	None	None
Objectionable Weeds (Max.) **2**	1/50 grams	2/50 grams
Seed Analysis **3**	See footenote 3	See footenote 3
Sclerotinia bodies	~~None~~ 1/50 grams	~~None~~ 1/50 grams
Leptosphaeria maculans	0.01%	0.01%

The Foundation Seed Stocks – Alternative Rules and Regulations Committee, has reviewed the proposed change to the Idaho canola, rapeseed , mustard certification standards. The Idaho Department of Agriculture also reviewed the proposed change. Receiving no objections in regard to the proposed change, the Foundation Seed Stocks – Alternative Crops Sub-Committee recommends that changes be accepted as submitted and that the standards be forwarded to the University of Idaho – Board of Regents for acceptance and presented to the State of Idaho Legislature for consideration as rule under the Idaho Administrative Procedures Act.

Upon Your Signature below you are accepting this change to the Idaho Crop Improvement Standards as presented to committee.

M McGuire Date: 4/26/16

Mark McGuire
Idaho Agricultural Experiment Station

Cc: Kent Nelson, Doug Boze

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SUBJECT

Proposed Rule IDAPA 47.01.01 – Division of Vocational Rehabilitation

REFERENCE

June 2015	Board approved pending rule to clarify language regarding the Divisions of Vocation Rehabilitation customer appeal and mediation process as well as technical changes. Board approved the Division of Vocational Rehabilitations Field Service Manual.
August 2015	Board approved pending rule change to IDAPA 47.01.01

APPLICABLE STATUTE, RULE, OR POLICY

Idaho Administrative Code, IDAPA 47.01.01

BACKGROUND/DISCUSSION

The Idaho Division of Vocational Rehabilitation (IDVR) Field Service Manual contains internal processes to IDVR as well as eligibility and program requirements for the people and agencies IDVR serves. Currently this manual is incorporated by reference into Idaho Administrative Code, IDAPA 47.01.01. When a document is incorporated by reference into administrative rule it has the force and effect of law and can only be changed through Board approval and the rulemaking process. In 2015, IDVR has identified a number of processes in the Field Service Manual that belong more appropriately in a policies and procedures manual of the agency. Starting in 2015 IDVR began the process of identifying areas that belong in the manual versus those areas that more appropriately belong in administrative rule with the end goal of removing the Field Service Manual from Administrative Code altogether. The proposed amendments to the Field Service Manual and administrative rule, IDAPA 47.01.01 provided for consideration this year are phase 2 of a multi-year process.

Additional amendments are being made to update references to the Workforce Innovation and Opportunity Act and update the Order of Selection procedures with federal guidelines and best practices.

IMPACT

The proposed changes incorporate the updated Field Service Manual into rule and bring the rule compliant with federal order of selection guidelines.

ATTACHMENTS

STAFF COMMENTS AND RECOMMENDATIONS

Proposed rules have a 21 day comment period prior to becoming pending rules. Based on received comments and Board direction, changes may be made to proposed rules prior to entering the pending stage. All pending rules will be brought back to the board for approval prior to submittal to the Department of Administration for publication in the Idaho Administrative Rules Bulletin as a pending rule. Pending rules become effective at the end of the legislative session in which they are submitted.

Staff recommends approval.

BOARD ACTION

I move to approve the Division of Vocational Rehabilitations Field Services Policy Manual as submitted in Attachment 2.

Moved by __________ Seconded by __________ Carried Yes _____ No _____

AND

I move to approve changes to Proposed Rule IDAPA 47.01.01 as submitted in Attachment 1.

Moved by __________ Seconded by __________ Carried Yes _____ No _____

IDAPA 47
TITLE 01
CHAPTER 01

IDAPA 47 - DIVISION OF VOCATIONAL REHABILITATION

47.01.01 - RULES OF THE IDAHO DIVISION OF VOCATIONAL REHABILITATION

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

001. TITLE AND SCOPE.

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

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

(Break in Continuity of Sections)

004. INCORPORATION BY REFERENCE.

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

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

a. All federal publications through the Rehabilitation Services Administration. (2-17-09)

b. Idaho Division of Vocational Rehabilitation Field Services Policy Manual, ~~August 13, 2015,~~ approved August 11, 2016, available for review on the website at http://www.vr.idaho.gov/. (3-25-16)

c. Workforce Innovation and Opportunity Act (WIOA), Public Law 113-128.~~Workforce Investment Act, Public Law 105-220.~~ ~~(5-3-03)~~

d. Federal Register, Department of Education, 34 CFR Parts 361, ~~-~~363, and 397. ~~(2-17-09)~~

e. The Rehabilitation Act of 1973, as amended. (2-17-09)

03. Availability of Reference Material. Copies of the documents incorporated by reference into these rules are available at the Central Office, Idaho Division of Vocational Rehabilitation, 650 W. State Street, Room 150, Boise, Idaho 83720, (208) 334-3390 or through access to the internet URL addresses outlined in Subsection 004.02. (2-17-09)

005. -- 009. (RESERVED)

010. DEFINITIONS.

01. Authorization forto Purchase. A purchase order issued on behalf of the Division. (5-3-03)

02. CFR. Code of Federal Regulations. (7-1-93)

03. Customer. Any individual who has applied for or is eligible for Vocational Rehabilitation services. (7-1-13)

04. Designated State Agency. The Idaho State Board of Education. (5-3-03)

05. Designated State Unit. The Idaho Division of Vocational Rehabilitation. (7-1-93)

06. IDVR. The Idaho Division of Vocational Rehabilitation. (4-5-00)

07. IPE. Individualized Plan for Employment. (4-5-00)

08. Most Significant Disability (MSD). Meets the criteria as Significant Disability as found in the Rehabilitation Act of 1973, as amended, and defined in 34CFR Part 361.5 (b) 30 and is further defined as: (2-17-09)

a. Having a severe physical, mental, cognitive or sensory impairment which seriously limits three (3) or more functional capacities (such as mobility, communication, self-care, self-direction, interpersonal skills, work tolerance or work skills) in terms of an employment outcome; and (7-1-13)

b. Whose vocational rehabilitation can be expected to require multiple vocational rehabilitation services over an extended period of time. (3-20-04)

09. Method of Written Notification. The written notification of findings and conclusions arising from an Informal Dispute Resolution, Mediation, or Fair Hearing, shall be served to the customer via the U.S. Postal Service. (7-1-13)

10. PM. Policy Memorandum. (5-3-03)

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

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

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

011. -- 099. (RESERVED)

100. CUSTOMER APPEALS.
In accordance with 34 CFR Part 361.57, the customer appeals process is governed by Section 100 through 103 of these rules and is outlined in the Division's ~~agency~~ Field Services Policy Manual on the website at http://www.vr.idaho.gov/ that is incorporated by reference into these rules in Subsection 004.02.b. (7-1-13)

(Break in Continuity of Sections)

102. MEDIATION.
Mediation is an alternate dispute resolution method available to applicants and eligible customers who have initiated the formal appeals process. (7-1-13)

01. Time ~~L~~line. A customer must request mediation within twenty (20) calendar days of the original decision or ten (10) calendar days following the written proposal from the informal review. Mediation is available to a customer when and informal review has not resolved the dispute to the satisfaction of the customer. (7-1-13)

02. Written Request. Requests for mediation must be made in writing to the chief of field services and must clearly state the reason for dissatisfaction with the decision or results of the informal review. The chief of field services will represent IDVR or assign a member of the administrative or supervisory staff who has not participated in the agency action that created the customer's dissatisfaction. (7-1-13)

03. Participation. Participation in the mediation process is voluntary on the part of the customer and on the part of IDVR. Either party may reject mediation as an alternate dispute resolution method. Once mediation has been accepted as an alternate dispute resolution method, either party may terminate the mediation process. (7-1-13)

04. Fair Hearing. Mediation may not be used to deny or delay the customer's right to pursue a fair hearing. Should the customer and/or designated representative select mediation in lieu of a fair hearing the option for a fair hearing will be extended to allow the results of the mediation to be established. Once the final results of the mediation are determined, the customer retains the right to request a fair hearing. (7-1-13)

05. Mediator. All mediation is conducted by a qualified and impartial mediator who is selected randomly from a list of mediators maintained by IDVR. (7-1-13)

06. Confidentiality. Mediation discussions are confidential and may not be used as evidence in a fair hearing. A confidentiality agreement will be signed by both parties at the beginning of the mediation process. (7-1-13)

07. Mediation Agreement. The mediator will develop a written mediation agreement if an agreement between the parties is reached. The agreement must be signed by the customer, the mediator, and the IDVR designated representative. (7-1-13)

08. Cost. Cost of mediation is paid by IDVR. IDVR is not required to pay for any cost related to the representation of a customer. (7-1-13)

103. FAIR HEARING PROCESS.
The fair hearing process is an option available to any customer who is dissatisfied with any determination made by personnel of IDVR that affects the provisions of vocational rehabilitation services. A customer may request a fair hearing immediately without having to go through any other appeal steps. A customer may request, or if appropriate may request through the customer's representative, a timely review of the determination. Such request must be made within sixty (60) days of the IDVR decision resulting in the initial disagreement or within ten (10) calendar days of the conclusion of the informal review or mediation process, whichever is later. The fair hearing process shall include a fair hearing conducted by a fair hearing officer (FHO). (7-1-13)

01. Procedure. A fair hearing is a procedure whereby a customer who is dissatisfied with any determination concerning the provision or denial of IDVR services or the findings of the informal review or mediation may seek a determination of agency action before a fair hearing officer. (7-1-13)

02. Written Request. ~~A r~~Requests for a fair hearing must be sent in writing to the chief of field services and clearly state the customer's dissatisfaction with the agency's decision. (7-1-13)

03. Timeline. The hearing shall be conducted within sixty (60) calendar days of receipt of the individual's request for review, unless informal resolution is achieved prior to the 60th day, or the parties agree to a specific extension of time. (3-29-10)

04. Fair Hearing Officers. A list of fair hearing officers shall be identified jointly by the Administrator of IDVR and the State Rehabilitation Council. The fair hearing officer shall be selected from the list by the administrator of IDVR and the customer. (7-1-13)

05. Written Report. The fair hearing officer shall issue a written report of the findings and decision of the hearing within thirty (30) calendar days of the completion of the hearing. (7-1-13)

06. Decision. The decision of the fair hearing officer shall be considered final by the agency. (7-1-13)

07. Dispute. Any party who disagrees with the findings and decisions of a fair hearing officer shall have the right to bring a civil action with respect to the matter in dispute. The action may be brought in any state court of competent jurisdiction or in a district court of the United States of competent jurisdiction without regard to the amount in controversy. (7-1-13)

104. -- 199. (RESERVED)

200. ORDER OF SELECTION.

In the event that the Division of Vocational Rehabilitation lacks the personnel and/or financial resources to provide the full range of vocational rehabilitation services to all eligible individuals, the following Order of Selection (OOS) will be used to prioritize service provision. Students with disabilities (as defined by 34 CFR 361.5 (c) (51)) who received pre-employment transition services prior to eligibility determination and assignment to a priority category shall continue to receive such services. All customers who have an Individualized Plan for Employment (IPE) will continue to be served.

Priority will be given to eligible individuals with the most significant disabilities, followed by those eligible individuals with significant disabilities, and finally those eligible individuals with disabilities. All eligible customers will be assigned to one of the following priority categories:
~~The following order of selection will be used if the Idaho Division of Vocational Rehabilitation finds that it cannot serve all eligible customers due to a lack of either personnel and/or financial resources. The priority listings progress downward with priority one (Priority Number 1) being the most restrictive and priority four (Priority Number 4) being the least restrictive. (7-1-13)~~

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

02. Priority ~~Number~~ 2. Eligible individuals with Significant Disabilities (SD)~~At the time that a decision to move to an order of selection is made, it is determined that only those customers in Priority Number 1 above and current and future, otherwise eligible, customers rated to this or a more restrictive priority can be served. Customers meeting this priority rating are those customers with most significant disabilities. (7-1-13)~~

03. Priority ~~Number~~ 3. All other eligible individuals with Disabilities (D). ~~At the time that a decision to move to an order of selection is made, it is determined that only those customers in Priorities Numbers 1 and 2 above and current and future, otherwise eligible, customers rated to this or a more restrictive priority can be served. Customers meeting this priority rating are those customers with significant disabilities. (7-1-13)~~

~~**04. Priority Number 4**. All eligible customers for Vocational Rehabilitation services (no order of selection in place). (7-1-13)~~
If the Idaho Division of Vocational Rehabilitation cannot serve all eligible individuals within a given priority category, individuals will be released from the statewide waitlist based on priority category and date of application.

201. -- 299. (RESERVED)

300. CUSTOMER SERVICES.

01. Provision of Purchased Services Contingent Upon Financial Need of the Customer. The Idaho Division of Vocational Rehabilitation will apply a financial needs assessment. Financial need will not be a consideration in the determination of eligibility for Vocational Rehabilitation, but will be a consideration in allocating the cost of VR services, with some exceptions. (7-1-13)

02. Authorization for~~to~~ Purchase. The Division requires that when purchasing services from a vendor, an authorization must be issued prior to, or on, the beginning date of service. If services are provided without a

Division approved authorization for~~to~~ purchase, the Division reserves the right to not honor the vendor's invoice. (5-3-03)

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

04. Residency Requirement. There is no duration of residency requirement. The customer must be living in the state of Idaho and legally be able to work within the United States (i.e., non U.S. citizens must show they are legally able to work within the United States). (7-1-13)

05. Provision of ~~CRP (~~Community Rehabilitation Program~~)~~(CRP) Services. ~~IDVR~~ Idaho Division of Vocational Rehabilitation will purchase vocational services from CRPs that are accredited by either Commission Accreditation Rehabilitation Facilities (CARF), the Rehabilitation Accreditation Commission, or Rehabilitation Services Accreditation System (RSAS). In conjunction with the customer, the qualified professional Vocational Rehabilitation Counselor, will determine which CRP Services, if any, are required for the customer to achieve an employment outcome. (7-1-13)

301. -- 999. (RESERVED)

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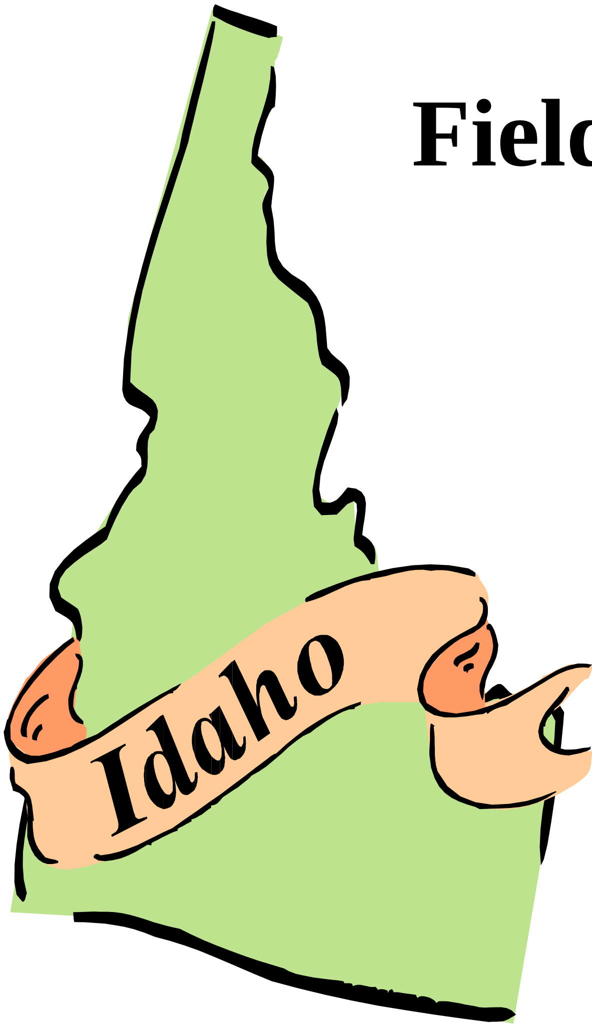

Field Services Policy Manual

Draft~~Approved~~ August 1~~3~~, 20166~~5~~

Effective July 1, 20177~~6~~

**IDAHO DIVISION OF VOCATIONAL REHABILITATION
FIELD SERVICES POLICY MANUAL**

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

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

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

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

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

The Division strives to maintain a highly accountable program to all customers.

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

EXCEPTION TO POLICY
VRCs are delegated substantial decision and purchasing authority based upon the maximum agency contributions ~~caps~~ outlined in the Payment Policy. Exceptions to policy require the approval of a RM and the notification and consultation of the Chief of Field Services. Documentation of the RM's approval must be noted in the case file.

Purchases in excess of delegated authority are reviewed by the RM and approved by the Chief of Field Services or designee. Documentation of the approval of purchases in excess must be noted in case file.

1.1 Legal Citations

The IDVR program is operated in compliance with the Federal Rehabilitation Act of 1973, as amended by the Workforce Innovation and Opportunity Act (WIOA) enacted on July 22, 2014. The legal authorities for the policies contained in the Vocational Rehabilitation Services Policy Manual are: Proposed Rules to Title 34 CFR Parts 361, 363, and 397 issued April 16, 2015 in the Federal Register implementing the Rehabilitation Act Amendments; and Title 67, Chapter 53 of the Idaho code related to provisional appointments in state government for those with severe disabilities.

1.2 Program Requirements

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

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

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

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

Goods and services will be provided subject to the guidelines of Order of Selection (Section 14.0).

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

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

1.3 Provider Standards

IDVR requires service providers:

To be licensed by the Division of Occupational Licensing, the U.S. Department of Education Office of Post-Secondary Education, or a professional certifying body.

OR

IDVR requires service providers that offer vocational rehabilitation services to apply to be an approved service provider with the Division. CRPs must be accredited based on IDAPA rules.

OR

VRCs may occasionally approve the purchase of services from non-license providers such as, educational tutoring, foreign language interpreters, or other services to support the rehabilitation needs of a customer.

1.4 Selection of Service Providers

Providers are selected by a combination of the customer's informed choice and State procurement rules. VRCs will assist the customer in acquiring information necessary to make an informed choice regarding the selection of service provider.

1.5 Definitions:

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

a. ***Applicant*** means, customer who submits an application for vocational rehabilitation services in accordance with Sec. 361.41(b) (2). (Authority: Section 12(c) of the Act; 29 U.S.C 709 (c))

b. ***Assessment for determining eligibility and vocational rehabilitation needs*** means, as appropriate in each case, (i)(A) A review of existing data—(1) To determine if a customer is eligible for vocational rehabilitation services; and (2) To assign priority for an O~~o~~rder of S~~s~~election described in Sec. 361.36 in the States that use an O~~o~~rder of S~~s~~election; and (B) To the extent necessary, the provision of appropriate assessment activities to obtain necessary additional data to make the eligibility determination and assignment; (ii) To the extent additional data are necessary to make a determination of the employment outcomes and the nature and scope of vocational rehabilitation services to be included in the individualized plan for employment for an eligible customer, a comprehensive assessment to determine the unique strengths, resources, priorities, concerns, abilities, capabilities, interests, and informed choice, including the need for support employment, of the eligible customer. This comprehensive assessment – (A) is limited to information that is necessary to identify the rehabilitation needs of the customer and to develop the individualized plan of employment of the eligible customer; (B) Uses as a primary source of information, to the maximum extent possible and appropriate and in accordance with confidentiality requirements –

1) Existing information obtained for the purposes of determining the eligibility of the customer and assigning priority for an O~~o~~rder of S~~s~~election described in Sec. 361.36 for the customer; and

2) Information that can be provided by the customer and, if appropriate, by the family of the customer; (c) May include, to the degree needed to make such a determination, an assessment of the personality, interests, interpersonal skills, intelligence and related functional capacities, educational achievements, work experience, vocational aptitudes, personal and social adjustments, and employment opportunities of the customer and the medical, psychiatric, psychological, and other pertinent vocational, educational, cultural, social,

recreational, and environmental factors that affect the employment and rehabilitation needs of the customer; and (D) May include, to the degree needed an appraisal of the patterns of work behavior of the customer and services needed for the customer to acquire occupational skills and to develop work attitudes, work habits, work tolerance, and social and behavior patterns necessary for successful job performance, including the use of work in real job situations to assess and develop the capacities of the customer to perform adequately in a work environment; (iii) Referral, for the provision of rehabilitation technology services to the customer, to assess and develop the capacities of the customer to perform in a work environment; and (iv) An exploration of the customer's abilities, capabilities, and capacity to perform in work situations, which must be assessed periodically during trial work experience, including experiences in which the customer is provided appropriate supports of training.
(Authority: Section 7(2) and 12 (c) of the Act; 29 U.S.C. 705(2) and 709 (c))

c. ***Assistive technology device*** means any item, piece of equipment, or product system, whether acquired commercially off the shelf, modified, or customized, that is used to increase, maintain, or improve the functional capabilities of a customer with a disability. (Authority: Sections 7(3) of the Act; 29 U.S.C. 705(3))

d. ***Assistive technology service*** means any service that directly assists a customer with a disability in the selection, acquisition, or use of an assistive technology device, including; (i) The evaluation of needs of a customer with a disability, including a functional evaluation of the customer in his or her customary environment; (ii) Purchasing, leasing, or otherwise providing for the acquisition, by a customer with a disability, of an assistive technology device; (iii) Selecting, designing, fitting, customizing, adapting, applying, maintaining, repairing, or replacing assistive technology devices; (iv) Coordinating and using other therapies, interventions, or services with assistive technology devices, such as those associated with existing education and rehabilitation plans and programs; (v) Training or technical assistance for a customer with a disability or, if appropriate, the family members, guardians, advocates, or authorized representatives of the customer; and (vi) Training or technical assistance for professionals (including customers providing education and rehabilitation services), employers, or others who provide services to, employ, or are otherwise substantially involved in the major life functions of customers with disabilities, to the extent that training or technical assistance is necessary to the achievement of an employment outcome by a customer with a disability. (Authority: Sections 7(4) and 12(c) of the Act; 29 U.S.C. 705(4) and 709 (c))

e. ***Community rehabilitation program.*** (i) Community rehabilitation program means a program that provides directly or facilitates the provision of one or more of the following vocational rehabilitation services to customers with disabilities to enable those customers to maximize their opportunities for employment, including career advancement: (A) Medical, psychiatric, psychological, social, and vocational services that are provided under one management; (B) Testing, fitting, or training in the use of prosthetic and orthotic devices; (C) Recreational therapy; (D) Physical and occupational therapy; (E) Speech, language, and hearing therapy (F) Psychiatric, psychological, and social services, including positive behavior management;. (G) Assessment for determining eligibility and vocational rehabilitation needs; (H) Rehabilitation Evaluation or control of specific disabilities; (K) Orientation and mobility services for customers who are blind; (L) Extended employment; (M) Psychosocial rehabilitation services; (N) Supported employment services and extended services; (O) Services to family members if necessary to enable the applicant or eligible customer to achieve an employment outcome; (P) Personal assistance services; (Q) Services similar to the services described in paragraphs (A) through (P) of this definition. (ii) For the purposes of this definition, the word program means an agency, organization, or institution, or unit of an agency, organization, or institution, that provides directly or facilitates the provision of vocational rehabilitation services as one of its major functions.

~~f.~~ ***Comparable services and benefits*** *means,* (i) Services and benefits that are (A) Provided or paid for, in whole or in part, by other Federal, State, or local public agencies, by health insurance, or by employee benefits; (B) Available to the customer at the time needed to ensure the progress of the customer toward achieving the employment outcome in the customer's individualized plan for employment in accordance with Sec. 361.53; and (C) Commensurate to the services that the customer would otherwise receive from the designated State vocational rehabilitation agency. (ii) For the purposes of this definition, comparable benefits do not include awards and scholarships based on merit. (Authority: Sections 12 (c) and 101 (a)(8) of the Act; 29 U.S.C. 709 (c) and 721 (a)(8))

f.

~~g.~~

g. ***Competitive integrated employment*** means work~~; (i) in the competitive labor market that is performed on a full-time or part-time basis in an integrated setting; and (ii) For which a customer is compensated at or above the minimum wage, but not less than the customary wage and level of benefits paid by the employer for the same or similar work performed by customers who are not disabled. (Authority: Sections 7(11) and 12(c) of the Act; 29 U.S.C. 705(11) and 709 (c))~~ that (i) Is performed on a full-time or part-time basis (including self-employment) and for which an individual is compensated at a rate that (A) Is not less than the higher of the rate specified in Fair Labor Standards Act or the rate required under Idaho's minimum wage law; (B) Is not less than the customary rate paid by the employer for similar work performed by other employees and who have similar training, experience, and skills; and (C) For individuals who are self-employed, earns a comparable income to other individuals who are self-employed in similar occupations and who have similar training, experience, and skills; and (D) Is eligible for the same benefits provided to other employees; and (ii) Is at a location (A) Typically found in the community, (B) Where the employee with a disability interacts for the purpose of performing the duties of the position, with other employees in the particular work unit and the entire work site, and as appropriate to the work performed, other persons (e.g., customers and vendors), who are not individuals with disabilities (not including supervisory personnel or individuals who are providing services to such employee) to the same extent that employees who are not individuals with disabilities and who are in comparable positions interact with these persons; and (iii) Presents, as appropriate, opportunities for advancement that are similar to those for other employees who are not individuals with disabilities and who have similar positions. (Authority: Sections 7(5) and 12(c) of the Act; 29 U.S.C. 705(5) and 709(c))

h. ***Customized employment*** means, competitive integrated employment, for an individual with a significant disability, that is (i) Based on an individualized determination of the unique strengths, needs, and interests of the individual with a significant disability; (ii) Designed to meet the specific abilities of the individual with a significant disability and the business needs of the employer; and (iii) Carried out through flexible strategies, such as (A) Job exploration by the individual; and (B) Working with an employer to facilitate placement, including (1) customizing a job description based on current employer needs or on previously unidentified and unmet employer needs; (2) Developing a set of job duties, a work schedule and job arrangement, and specifics of supervision (including performance evaluation and review), and determining a job location; (3) Using a professional representative chose by the individual, or if elected self-representation, to work with an employer to facilitate placement; and (4) Providing services and supports at the job location. (Authority: Sections 7(7) and 12(c) of the Act; 29 U.S.C. 705(7) and 709(c))

i. ***Employment outcome*** means, with respect to a customer, entering or retaining full-time or, if appropriate, part-time competitive employment, as defined in Sec. 361.5 (b)(11), in the integrated labor market, supported employment, or any other type of employment in an integrated setting, including a customer's strengths, resources, priorities, concerns, abilities, capabilities, interests, and informed choice. (Authority: Sections 7(11), 12(c), 100(a)~~(2)~~, and 102 (b)(4~~3~~)(A) of the Act; 29 U.S.C. 705 (11), 709(c), 720 (a)~~(2)~~, and 722 (b)(4~~3~~)(A))

j. ***Employment outcome maintained*** means the customer has maintained the employment outcome for an appropriate period of time, but not less than 90 days, necessary to ensure the stability of the employment outcome and the customer no longer needs vocational rehabilitation services.

k. ***Satisfactory outcome*** means at the end of the appropriate period, not less than 90 days, the customer and the vocational counselor consider the employment outcome to be satisfactory and agree that the customer is performing well in the employment.

~~k.~~l. ***Extended Employment*** *means* work in a non-integrated or sheltered setting for a public or private nonprofit agency or organization that provides compensation in accordance with the Fair Labor Standards Act. (Authority: Section 12 (c)) of the Act; 29 U.S.C. 709 (c))

~~l.~~m. ***Extended services*** means ongoing support services and other appropriate services that are needed to support and maintain a customer with a most significant disability including a youth with a most significant disability, in supported employment and that are provided by a State agency, a private nonprofit organization, employer, or any other appropriate resource, from funds other than funds received under this part and 34 CFR part 363 after a customer with a most significant disability has made the transition from support provided by the designated State unit. (Authority: Sections 7 ~~-~~(13), 12 (c)), and ~~and~~ 604(b)~~23~~ of the Act; 29 U.S.C. 705 (13), 709 (c) and 795i~~i)~~))

~~m.~~n. ***Family member,*** for purposes of receiving vocational rehabilitation services in accordance with Sec 361.48(i), means a customer; (i) Who either, (A) Is a relative or guardian of an applicant or eligible customer; or (B) Lives in the same household as an applicant or eligible customer; (ii) Who has a substantial interest in the well-being of that customer; and (iii) Whose receipt of vocational rehabilitation services is necessary to enable the applicant or eligible customer to achieve an employment outcome. (Authority; Sections 12 (c) and 103 (a)(19~~7~~) of the Act; 29 U.S.C. 709 (c) and 723 (a)(19~~7~~))

~~n.~~o. ***Indian tribe*** means any Federal or State Indian tribe, band, Rancheria, pueblo, colony, or community, including any Idaho native village or regional village corporation. (Authority: Section 7 (19)~~(B)~~ of the Act; 29 U.S.C. 705 (19)~~(B)~~)

~~o.~~p. ***Customer with a disability,*** except as provided in Sec. 361.5(b) (29), means a customer (i) Who has a physical or mental impairment; (ii) Whose impairment constitutes or results in a substantial impediment to employment; and (iii) Who can benefit in terms of an employment outcome from the provision of vocational rehabilitation services. (Authority; Sections 7(20)(A) of the Act; 29 U.S.C. 705(20)(A))

~~p.~~q. ***Customer's representative*** means any representation chosen by a customer or eligible customer, as appropriate, including a parent, guardian, other family member, or advocate, unless a representative has been appointed by a court to represent the customer, in which case the court-appointed representative is the customer's representative. (Authority: Sections 7 (22) and 12 (c) of the Act; 29 U.S.C. 705(22) and 709 (c))

~~q.~~r. ***Informed choice*** means the process by which customers in the public rehabilitation program make decisions about their vocational goals, the services and service providers necessary to reach those goals, and how those services will be procured. The decision making process takes into account the customer's values, lifestyle, and characteristics, the availability of resources and alternatives, and general economic conditions. Informed choice is a collaborative process involving the customer and IDVR staff in coordination with other resources as necessary.

Informed Choice Guidelines:
Informed choice does not mean unlimited choice. A customer's choices are limited by several factors.

- The choice must relate to and be necessary to achieving an employment outcome
- The choice must be consistent with the customer's strengths, resources, priorities, abilities, capabilities, needs and interests.
- The choice must be made pursuant to all Federal, State, and IDVR rules related to purchasing and providing services.
- When deciding what goods and services will be provided, the following will be part of the informed choice decision:
    - Cost, accessibility, and duration of potential services;
    - Customer satisfaction with those services to the extent that information relating to customer satisfaction is available;
    - Qualifications of potential service providers;
    - Types of services offered by the potential providers;
    - Degree to which services are provided in integrated settings; and

- Outcomes achieved by individuals working with service providers, to the extent that such information is available.

~~r.~~s. ***Integrated setting,*** (i) With respect to the provision of services, ~~means~~ a setting typically found in the community in which applicants or eligible customers interact with non-disabled individuals~~customers~~ other than non-disabled individuals~~customers~~ who are providing services to those applicants or eligible customers; (ii) With respect to an employment outcome, means a setting typically found in the community where the employee with a disability~~in which applicants or eligible customers~~ interacts, for the purpose of performing the duties of the position, ~~-~~with other employees within the particular work unit and the entire work site, and, as appropriate to the work performed, other persons who are not individuals with disabilities (not including supervisory personnel or individuals who are providing services to such employee) to the same extent that employees who are not individuals with disabilities and who are in comparable position interact with these customers. ~~non-disabled customers, other than non-disabled customers who are providing services to those applicants or eligible customers, to the same extent that non-disabled customers in comparable positions interact with other persons.~~ (Authority: Sections 12 (c) of the Act; 29 U.S.C. 709 (c))

~~s.~~t. ***Maintenance*** means monetary support provided to a customer for expenses, such as food, shelter, and clothing, that are in excess of the normal expenses of the customer and that are necessitated by the customer's participation in an assessment for determining eligibility and vocational rehabilitation needs or the customer's receipt of vocational rehabilitation services under an individualized plan for employment. (Authority: Sections 12 (c) and 103 (a)(7) of the Act; 29 U.S.C. 709 (c) and 723 (a)(7))

~~t.~~u. ***Ongoing support services,*** as used in the definition of "Supported E~~e~~mployment", means services that ~~-(i) Means services that are~~ (i~~A~~) Are n~~N~~eeded to support and maintain a customer with a most significant disability, including a youth with a most significant disability, ~~-~~in supported employment; (ii~~B~~) Are i~~I~~dentified based on a determination by the designated State unit of the customer's need as specified in an individualized plan for employment; and (iii~~C~~) Are f~~F~~urnished by the designated State unit from the time of job placement until transition to extended service, unless post-employment services are provided following transition, and thereafter by one or more extended services providers throughout the customer's term of employment in a particular job placement or multiple placements if those placements are being provided under a program of transitional employment; (ii) Must include an assessment of employment stability and provision of specific services or the coordination of services at or away from the worksite that are needed to maintain stability bases on; (A) At a minimum, *twice-monthly monitoring at the worksite* of each customer in supported employment; or (B) If under specific circumstances, especially at the request of the customer, the individualized plan for employment provides for *off-site monitoring, twice monthly meetings with the customer;* (iii) Consist of; (A) Any particularized assessment supplementary to the comprehensive assessment of rehabilitation needs described in paragraph (b)(6)(ii) of this section; (B) The provision of skilled job trainers who accompany the customer for intensive job skill training at the work site; (C) Job development and training; (D) Social skills training; (E) Regular observation or supervision of the customer; (F) Follow-up services including: regular contact with the employers, the customers, the parents, family members, guardians, advocates, or authorized representatives of the customers, and other suitable professional and informed advisors, in order to reinforce and stabilize the job placement; (G) Facilitation of natural supports at the worksite; (H) Any other service identified in the scope of vocational rehabilitation services for customers, described in SEC. 361.48; or (I) Any service similar to the foregoing services. (Authority: Sections 7 (27) and 12 (c) of the Act; 29 U.S.C. 705 (27) and 709 (c))

~~u.~~v. ***Personal assistance services*** means a range of services provided by one or more persons designed to assist a customer with a disability to perform daily living activities on or off the job that the customer would typically perform without assistance if the customer did not have a disability. The services must be designed to increase the customer's control in life and ability to perform everyday activities on or off the job. The services must be necessary to the achievement of an employment outcome and may be provided only while the customer is receiving other vocational rehabilitation services. The services may include training in managing, supervising, and directing personal assistance services. (Authority: Sections 7(28), 102(b)(4~~3~~)(B)(i)(I), and 103(a)(9) of the Act; 29 U.S.C. 705(28), 722(b)(4~~3~~)(B)(i)(I), and 723(a)(9)) [[Page 272]]

~~v.~~w. ***Physical and mental restoration services*** means; (i) Corrective surgery or therapeutic treatment that is likely, within a reasonable period of time, to correct or substantially modify a stable or slowly progressive physical or mental impairment that constitutes a substantial impediment to employment; (ii) Diagnosis of and treatment for mental or emotional disorders by qualified personnel in accordance with State licensure laws; (iii) Dentistry; (iv) Nursing services; (v) Necessary hospitalization (either inpatient or outpatient care) in connection with surgery or treatment and clinic services; (vi) Drugs and supplies; (vii) Prosthetic and orthotic devices; (viii) Eyeglasses and visual services, including visual training, and the examination and services necessary for the prescription and provision of eyeglasses, contact lenses, microscopic lenses, telescopic lenses, and other special visual aids prescribed by personnel that are qualified in accordance with State licensure laws; (ix) Podiatry; (x) Physical therapy; (xi) Occupational therapy; (xii) Speech or hearing therapy; (xiii) Mental health services; (xiv) Treatment of either acute or chronic medical complications and emergencies that are associated with or arise out of the provision of physical treatment; (xv) Special services for the treatment of customers with supplies; and (xvi) Other medical or medically related rehabilitation services. (Authority: Sections 12 (c) and 103 (a)(6) of the Act; 29 U.S.C. 709 (c) and 723 (a)(6))

w. ~~***Pre-employment transition services*** are those services/activities for students with disabilities (see page 10 for definition of student with disability). Required activities include job exploration counseling; work-based learning experiences, which may include in-school or after school opportunities, or experience outside the traditional school setting (including internships), that is provided in an integrated environment in the community to the maximum extent possible; counseling on opportunities for enrollment in comprehensive transition or postsecondary educational programs at institutions of higher education; workplace readiness training to develop social skills and independent living; and instruction in self-advocacy. Authorized activities may be also be provided. (Authority: Section 7(30), and 113 of the Act; 29 U.S.C. 7(30) and 733)~~

x. ***Physical or mental impairment*** means; (i) Any physiological disorder or condition, cosmetic disfigurement, or anatomical loss affecting one or more of the following body systems: neurological, musculoskeletal, special sense organs, respiratory (including speech organs), cardiovascular, reproductive, digestive, genitourinary, hemic and lymphatic, skin, and endocrine; or (ii) Any mental or psychological disorder such as mental retardation, organic brain syndrome, emotional or mental illness, and specific learning disabilities. (Authority: Sections 7(20)(A) and 12 (c) of the Act; 29 U.S.C. 705(20)(A) and 709 (c))

y. ***Post-employment services*** means one or more of the services identified in Section 361.48 that are provided subsequent to the achievement of an employment outcome and that are necessary for a customer to maintain, regain, or advance in employment, consistent with the customer's strengths, resources, priorities, concerns, abilities, capabilities, interests, and informed choice. (Authority: Sections 12 (c) and 103 (a)(18) of the Act; 29 U.S.C. 709 (c) and 723 (a)(18)) Note to paragraph (b) (42): Post-employment services are intended to ensure that the employment outcome remains consistent with the customer's strengths, resources, priorities, concerns, abilities, capabilities, interests, and informed choice. These services are available to meet rehabilitation needs that do not require a complex and comprehensive provision of services and, thus, should be limited in scope and duration. If more comprehensive services are required, then a new rehabilitation effort should be considered. Post-employment services are to be provided under an amended individualized plan for employment; thus, a re-determination of eligibility is not required. The provision of post-employment services is subject to the same requirements in this part as the provision of any other vocational rehabilitation service. Post-employment services are available to assist a customer to maintain employment, e.g., the customer's employment is jeopardized because of conflicts with supervisors or co-workers, and the customer needs mental health services and counseling to maintain the employment; to regain employment, e.g., the customer's job is eliminated through re-organization and new placement services are needed; and to advance in employment, e.g., the employment is no longer consistent with the customer's strengths, resources, priorities, concerns, abilities, capabilities, interests, and informed choice.

The customer is informed through appropriate modes of communication of the availability of post-employment services.

z. ***Pre-employment transition services*** are those services/activities for students with disabilities (see page 10 for definition of student with disability). Required activities include job exploration counseling; work-based learning experiences, which may include in-school or after school opportunities, or experience outside the traditional school setting (including internships), that is provided in an integrated environment in the community to the maximum extent possible; counseling on opportunities for enrollment in comprehensive transition or postsecondary educational programs at institutions of higher education; workplace readiness training to develop social skills and independent living; and instruction in self-advocacy. Authorized activities may also be provided. (Authority: Section 7(30), and 113 of the Act; 29 U.S.C. 7(30) and 733)

~~z.~~aa. ***Rehabilitation engineering*** means the systematic application of engineering sciences to design, develop, adapt, test, evaluate, apply, and distribute technological solutions to problems confronted by customers with disabilities in functional areas, such as mobility, communications, hearing, vision, and cognition, and in activities associated with employment, independent living, education, and integration into the community. (Authority: Section 7(3~~1~~2)~~(c)~~ and 12 (c) of the Act; 29 U.S.C. 705 (32) ~~9~~and 709 (c))

~~aa.~~bb. ***Rehabilitation technology*** means the systematic application of technologies, engineering methodologies, or scientific principles to meet the needs of, and address the barriers confronted by, customers with disabilities in areas that include: education, rehabilitation, employment, transportation, independent living, and recreation. The term includes rehabilitation engineering, assistive technology devices, and assistive technology services. (Authority: Section 7(32~~0~~) of the Act; 29 U.S.C. 705(32~~0~~))

~~bb.~~cc. S***tudent with a disability*** is an individual with a disability in a secondary, postsecondary, or other recognized education program who ~~who~~ is under the age of 22 at the time of service delivery and is eligible for and receiving special education services or is an individual with a disability, for the purposes of Section ~~on a~~ 504 ~~Plan~~. (Authority: Section 7(37) of the Act; 29 U.S.C. 705(37))

~~cc.~~dd. ***Substantial impediment to employment*** means that a physical or mental impairment (in light of attendant medical, psychological, vocational, educational, communication, and other related factors) hinders a customer from preparing for, entering into, engaging in, or retaining employment consistent with the customer's abilities and capabilities. (Authority: Sections 7(20)(A) and 12 (c) of the Act; 29 U.S.C. 705(20)(A) and 709 (c))

~~dd.~~ee. ***Supported employment means,*** (i) Competitive employment in an integrated setting, or employment in integrated work settings in which customers are working toward competitive employment, consistent with the strengths, resources, priorities, concerns, abilities, capabilities, interests, and informed choice of the customers with ongoing support services for customers with the most significant disabilities; (A) For whom competitive employment has not traditionally occurred or for whom competitive employment has been interrupted or intermittent as a result of a significant disability; and (B) Who, because of the nature and severity of their disabilities, need intensive supported employment services from the designated State unit and extended services after transition as described in paragraph (b)(20) of this section to perform this work; or (ii) Transitional employment, as defined in paragraph (b)(54) of this section, for customers with the most significant disabilities due to mental illness. (Authority: Section 7(38~~5~~), 709 (c), and 795g of the Act; 29 U.S.C. 7~~05~~(38~~5~~), 12 (c), and 602)~~)~~

~~ee.~~ff. ***Supported employment services*** means ongoing support services and other appropriate services needed to support and maintain a customer with a most significant disability in supported employment that are provided by the designated State unit; (i) For a period of time not to exceed 24 months, unless under special circumstances the eligible customer and the rehabilitation counselor or coordination jointly agree to extend the time, to achieve the employment outcome identified in the individualized plan for employment; and (ii) Following transition, as post-employment services that are unavailable from an extended services provider and that are necessary to maintain or regain the job placement or advance in employment. (Authority: Sections 7(39~~6~~)~~, and~~ 12 (c), and 103 (a) (16) of the Act; 29 U.S.C. 705(39), ~~6 and~~ 709 (c), and 723 (a) (16)~~)~~

~~ff.~~gg. ***Transition services*** means a coordinated set of activities for a student designed within an outcome-oriented process that promotes movement from school to post-school activities, including: post-secondary education, vocational training, integrated employment (including supported employment), continuing and adult education, adult services, independent living, or community participation. The coordinated set of activities must be based upon the student's needs, taking into account the student's preferences and interests, and must include instruction, community experiences, the development of employment and other post-school adult living objectives, and, if appropriate, acquisition of daily living skills and functional vocational evaluation. Transition services must promote or facilitate the achievement of the employment outcome identified in the student's individualized plan for employment. (Authority: Sections ~~7(37)~~12 (c) and 103 (a)(15) and (b) (7) of the Act; 29 U.S.C. 709~~5~~ (c) ~~(37)~~ and 723 (a)(15) and (b) (7))

~~gg.~~hh. ***Transitional employment,*** as used in the definition of "Supported Employment," means a series of temporary job placements in competitive work in integrated settings with ongoing support services for customers with the most significant disabilities due to mental illness. In transitional employment, the provision of ongoing support services must include continuing sequential job placement until job permanency is achieved. (Authority: Sections 7(38~~5~~)(B) and 12 (c) of the Act; 29 U.S.C. 705(38~~5~~)(B) and 709 (c))

~~hh.~~ii. ***Transportation*** means travel and related expenses that are necessary to enable an applicant or eligible customer to participate in a vocational rehabilitation service, including expenses for training in the use of public transportation vehicles and systems. (Authority: Section 12 (c) and 103 (a)(8) of the Act; 29 U.S.C. 709 (c) and 723 (a)(8))~~(i)~~

~~ii.~~jj. ***Vocational Rehabilitation Counselor*** (VRC) is the designated employee position in charge of managing the customer's case. For the purposes of this manual a Vocational Rehabilitation Specialist is considered a VRC.

ii. ***Youth with a disability*** is an individual with a disability who is under the age of 25. (Authority: Section 7(42) of the Act; 29 U.S.C. 705(42~~3~~))

1.6 Use of Audio and Video Recordings. IDVR reserves the right to prohibit customer use of video and audio recording without prior approval by the Chief of Field Services.

SECTION 2.0 – ETHICS

A. All IDVR employees must adhere to the Idaho Ethics in Government Manual: http://www.ag.idaho.gov/publications/manuals.html
B. IDVR ascribes to, and requires all Vocational Rehabilitation Counselors (VRCs) and field services staff to follow the Code of Professional Ethics for Rehabilitation

Counselors accepted by the Commission of Rehabilitation Counselor Certification (CRCC).
http://www.crccertification.com

C. Provision of Services to Potential and Current IDVR Employees/Interns/Volunteers

- If an IDVR employee becomes a customer, their VR case will be served by a region other than where they work.

- If an IDVR customer accepts employment with IDVR their case will be served by a region different than where they accepted employment.

D. Internships, participants in training programs, or trial work experiences of customers served by IDVR will not be served from a counselor in the same office where the trial work, internship, or participation in training programs is located.

E. If a family member of an employee or a family member of anyone who resides in the employee's residence applies for services they will be served by a counselor from a different region from the employee.

F. An employee shall not financially benefit from decisions made under the authority of IDVR.

G. An employee will not make IDVR purchases (case services or other purchases) from a family member or a family member of anyone who resides in the employee's residence, or from a business owned or controlled by such an individual. This includes customer reimbursements.

SECTION 3.0 PROTECTION, USE, AND RELEASE OF PERSONAL INFORMATION

3.1 Confidentiality

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

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

For purposes of this policy, informed written consent shall:

A. Be explained in language that the customer or their representative understands;

B. Be dated, and specify the length of effect;

C. Be specific in designating IDVR as the agency authorized to use, disclose or receive information;

D. Be specifically designated to the parties to whom the information may be released;

E. Specifically designate the parties whom the information may be released; and

F. Be specific as to the purpose(s) for which the information may be used.

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

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

3.2.1 Medical, psychological or other information that IDVR believes may be harmful to the customer. This information may not be released directly to the customer but may be provided to the customer through a third party chosen by the customer, which may include, among others, an advocate, a family member, or a qualified medical or mental health professional, unless a representative has been appointed by a court to represent the customer, in which case the information must be released to the court appointed representative.

3.2.2 Information obtained from outside IDVR may be released only under the conditions established by the outside agency, organization or provider or mandated for them by Federal or State law.

3.2.3 An applicant or eligible customer who believes that information in the customer's record of services is inaccurate or misleading may request that IDVR amend the information. If the information is not amended, the request for an amendment must be documented in the record of service.

3.2.4 IDVR will respond to a case records request made under this section within ten (10) working days after receipt of a written request. One current copy of the case record will be made for the customer at no charge. Additional copies will be provided at the flat fee of $25 each.

3.3 Release to Other Agencies or Organizations

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

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

3.4 Release in Response to Investigations in Connection with Law Enforcement

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

3.5 Release for Audit, Evaluation or Research

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

A. The information will be used only for the purposes for which it is being provided;

B. The information will be released only to customers officially connected with the audit, evaluation or research;

C. The information will not be released to the involved customer;

D. The information will be managed in a manner to safeguard confidentiality and,

E. The final product will not reveal any personal identifying information without the informed written consent of the involved customer, and/or his/her representative.

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

A subpoena issued to IDVR for information relating to a customer of IDVR must immediately be referred to the Chief of Field Services who will subsequently refer the document to the Deputy Attorney General assigned to the Agency to determine how the agency will respond to the subpoena.

3.7 Social Security Information

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

SECTION 4.0 APPEALS PROCESS

The VRC shall notify and provide written information to all applicants and eligible customers regarding:

A. Their right to appeal determinations made by IDVR personnel, which affect the provision of rehabilitation services;

B. Their right to request mediation;

C. The names and addresses IDVR personnel to whom requests for mediation or appeals may be filed;

D. The manner in which a mediator or hearing officer may be selected;

E. Availability of assistance from the Client Assistance Program (CAP).

F. If the Agency is following an Order of Selection, it shall inform all eligible customers of the priority they are in.

Timing of such notification shall be provided by the VRC:

A. At the time a customer applies for rehabilitation services;

B. At the time of the Individualized Plan for Employment (IPE) is developed;

C. At the time the customer is assigned to a category in the State's Order of Selection, if applicable; and

D. Upon reduction, suspension, or cessation of approved rehabilitation services for the customer.

Whenever possible, IDVR will attempt to resolve conflicts informally or through the Dispute Resolution process. IDVR will not pay for a customer's legal services.

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

4.1 Continuation of Services Pending Completion of the Appeal Process

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

4.2 Client Assistance Program (CAP) and Supervisory Review

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

4.3 Dispute Resolution Process

4.3.1 The Informal Review process is an option available to the customer as a proven means likely to result in a timely resolution of disagreements. A customer must request an Informal Review within twenty-one (21) calendar days of the agency notice regarding IDVR' s decision to provide or deny services that are in question. The request must be in writing to the RM. The request must describe the complaint.

In holding an Informal Review, the RM will function as the Review Officer. At the customer's request another RM may be substituted. The reviewer will be responsible for:

A. Advising the customer of his/her right to have a representative present and encouraging the customer to use the services of CAP.

B. Conducting the review within fifteen (15) calendar days following written receipt of a request for such a hearing. Unless an extension is agreed to by both parties.

C. When the customer makes a documented effort to utilize CAP or another selected advocate to resolve his/her dissatisfaction, the time allowed for conducting an Informal Review will be extended accordingly.

D. Holding the review at a time and place convenient to the customer, generally at the local IDVR branch office.

E. Providing communication methods for those customers who have a sensory impairment. An interpreter will be provided for those customers who cannot communicate in English.

F. If needed, assure that the customer is provided transportation to and from the review site.

G. The Informal Review Officer (RM) will attempt to resolve the matter to the satisfaction of the customer, developing a written proposal with the customer at the conclusion of the appeal process. The results are binding for the agency unless the proposal is not permitted by law. The customer may reject the proposal and request a Fair-Hearing within ten (10) calendar days of the Informal Review proposal or sixty (60) calendar days of the original IDVR decision, which ever one comes later.

4.4 Mediation

4.4.1 Mediation is an alternate dispute resolution method available to applicants and eligible customers who have initiated the Formal Appeals Process.

A. A customer must request Mediation within twenty (20) calendar days of the original decision or ten (10) calendar days following the written proposal from the

Informal Review. Mediation is available to a customer when an Informal Review has not resolved the dispute to the satisfaction of the customer.

B. Requests for mediation must be made in writing to the Chief of Field Services and clearly state the reason for dissatisfaction with the decision or results of the Informal Review. The Chief of Field Services will represent IDVR or assign a member of the administrative or supervisory staff who has not participated in the Agency action that created the customer's dissatisfaction.

C. Participation in the mediation process is voluntary on the part of the customer and on the part of IDVR. Either party may reject mediation as an alternate dispute resolution method. Either party, once accepting mediation as an alternate dispute resolution method, may terminate the mediation process.

D. Mediation is not used to deny or delay the customer's right to pursue a Fair Hearing. Should the customer and/or designated representatives select mediation in lieu of a Fair Hearing the option for the Fair Hearing will be extended to allow the results of the mediation to be established. After the final results of the mediation are determined, the customer retains the right to request a Fair Hearing.

E. Mediation is conducted by qualified and impartial mediators, who are selected randomly from a list of mediators maintained by the IDVR.

F. Mediation discussions are confidential and may not be used as evidence in a subsequent Fair Hearing. A confidentiality agreement will be signed by both parties at the beginning of the mediation process.

G. The mediator will develop a written Mediation Agreement, if an agreement between the parties is reached, it must be signed by the customer, the mediator, and IDVR.

H. Cost of mediation is paid by IDVR. IDVR is not required to pay for any cost related to the representation of a customer.

4.5 Fair Hearing Process

The Fair Hearing Process is an option available to any customer who is dissatisfied with any determination made by personnel of IDVR that affects the provisions of vocational rehabilitation services. A customer may request a Fair Hearing immediately without having to go through the other appeal steps.

A customer may request, or if appropriate, may request through the customer's representative, a timely review of the determination. Such a request must be made within sixty (60) days of the IDVR decision resulting in the initial disagreement or within ten (10) calendar days of the conclusion of the Informal Review or ten (10) calendar days of the conclusion of the Mediation Process whichever is later. The Fair Hearing Process shall include a Fair Hearing by a Fair Hearing Officer (FHO).

4.5.1 A Formal Hearing is a procedure whereby a customer who is dissatisfied with any determination concerning the provision or denial of IDVR services or the findings of the Informal Review or Mediation may seek a determination of the agency action before a Fair Hearing Officer.

4.5.2 A request for a Fair Hearing must be sent in writing to the Chief of Field Services and clearly state the customer's dissatisfaction with the Agency's decision.

4.5.3 The hearing shall be conducted within sixty (60) calendar days of receipt of the customer's request for review, unless informal resolution is achieved prior to the 60th day, or both parties agree to a specific extension of time.

4.5.4 A list of Fair Hearing Officers shall be identified jointly by the Administrator of IDVR and the State Rehabilitation Council.

4.5.5 The Fair Hearing Officer will be selected from the list by the Administrator of IDVR and the customer.

4.5.6 The Fair Hearing Officer shall issue a written report of the findings and decision of the hearing within thirty (30) calendar days of the completion of the hearing.

4.5.7 The decision of the Fair Hearing Officer shall be considered final by the agency.

4.5.8 Any party who disagrees with the findings and decisions of a Fair Hearing Officer shall have the right to bring a civil action with respect to the matter in dispute. The action may be brought in any State court of competent jurisdiction or in a district court of the United States of competent jurisdiction without regard to the amount in controversy.

SECTION 5.0 APPLICATION AND ELIGIBILITY DETERMINATION

A. People with disabilities can achieve competitive, high quality employment in an integrated setting and can live full productive lives.

B. People with disabilities often experience major barriers related to the low expectations of and misunderstandings toward, people with disabilities that exists within society, within the persons with disabilities themselves, and sometimes, within our own rehabilitation system.

C. People with disabilities should have responsibility and accountability to make their own choices about their lives; the kind of employment they want to pursue, who they want to provide services for them, as well as the kind of services they need.

D. The primary purpose and role of the public vocational rehabilitation system is to empower individuals with disabilities by providing them with information, education, training, and confidence, in order for them to~~that they will~~ make effective employment choices when appropriately informed. It is also the purpose of the public vocational rehabilitation system to support those choices when they are based upon reasonable and verifiable premises.

E. The most effective rehabilitation occurs when there are true partnerships between the customer, Federal and State programs~~partners~~, ~~State agency providers,~~ community providers and employers, the disability community, all other partners.~~, and the consumer.~~

The ~~ultimate~~ goal is to provide eligible customers with the skills, tools and information to aid in their vocational discovery process and to initiate informed choices when creating their Individualized Plan for Employment (IPE) with the VRC.

5.1 Inquiry

IDVR will respond to all general inquiries for VR services received via telephone, mail or electronic format within seven (7) business days.

5.2 Referral

A completed referral form for VR services from customers available to participate in services that are made via mail or electronic format will be entered into the case management system as an open referral within three (3) business days. IDVR staff will make a minimum of three (3) attempts to contact the customer before the referral is closed. The first attempt will include a phone call or e-mail. If unable to make contact, a letter will be sent to confirm IDVR has received the inquiry and will include the IDVR office phone number. If the customer does not respond to the first letter, a second letter will be sent stating that IDVR has been unable to contact the customer and that the referral for services will be closed. Attempts to reach the customer ~~and those results~~ will be documented in the case management system.

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

An application process is complete when the following three criteria are met:

1. IDVR receives a signed and dated A~~a~~pplication S~~s~~ignature S~~s~~heet from a customer or his/her representative, or an alternate request for application is made to an IDVR office;

AND

2. The customer provides the information needed to begin an assessment of eligibility. Information gathered in the intake interview meets this criterion;

AND

3. The customer is available and free of restrictions to complete the assessment process for determining eligibility for VR services.

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

Applicants must be available and participate in the eligibility determination process.

IDVR must, as part of the application process, inform applicants that the goal of VR services is to assist eligible customers to obtain or maintain employment and that services provided are toward this goal. Customers must also be informed of their rights and responsibilities.

The 60-day eligibility determination period begins when the application process is complete.

5.3.1 Orientation to Vocational Rehabilitation
IDVR is obligated to provide all customers with information regarding~~about~~ the following:

1. The Client Assistance Program (CAP);
2. Confidentiality;
3. VR services;
4. Informed choice;
5. The rehabilitation process;
6. C~~That c~~ustomers who receive VR services must intend to achieve an employment outcome;
7. The rights and responsibilities of the customer; and
8. The VR appeals process.

This information may be conveyed to customers through group orientations, in a one-on-one interview setting or over the telephone by IDVR staff.

5.3.2 Intake Interview
The intake interview is part of the application process and is the beginning of the assessment process to determine eligibility and potential services to be included on the Individualized Plan for Employment (IPE). Medical, psychological, social, vocational, educational, cultural and economic information is gathered to determine the unique strengths, abilities, and interests of the customer.

Prior to the end of the intake interview, the IDVR staff member should identify the actions needed by both IDVR and the customer. This may~~could~~ include:

1. Appointment(s) scheduled
2. Releases of Information obtained
3. Authorizations to be issued
4. Referral letters
5. Next scheduled meeting
6. Existing information the customer agrees to provide IDVR staff

5.4 Assessment for Determining Eligibility

Any customer who applies for services shall undergo an assessment to~~for~~ determine~~ing~~ eligibility and the priority for services, the results of which shall be shared with the customer.

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

Eligibility for IDVR services shall be determined within a reasonable period of time, not to exceed sixty (60) days after the application for services (a~~A~~ll three components of the~~an~~ application process must be complete~~received)~~) unless the following occurs:

A. The customer is notified that exceptional and unforeseen circumstances beyond the control of IDVR preclude the counselor from completing the determination within the prescribed time frame and the customer agrees that an extension of time is warranted;

OR

B. A T~~t~~rial W~~w~~ork E~~e~~xperience including an exploration of the customer's abilities, capabilities, and capacity to perform in realistic work situations is carried out.~~;~~

~~OR~~

~~C. An extended evaluation is necessary.~~

5.5 Eligibility Criteria

A customer is eligible for Vocational Rehabilitation if the following criteria are met:

A. A determination by qualified personnel that the customer has a physical or mental impairment;

B. A determination by a qualified VRC that the customer's physical or mental impairment constitutes or results in a substantial impediment to employment ~~for the applicant~~;

C. A determination by a qualified VRC employed by IDVR that the customer requires vocational rehabilitation services to prepare for, secure, retain, advance in, ~~-~~or regain employment consistent with the applicant's unique strengths, resources, priorities, concerns, abilities, capabilities, interest, and informed choice. ~~;~~

IDVR presumes that ~~A presumption by a qualified VRC that the~~ an applicant who meets the eligibility requirements above can benefit in terms of an employment outcome from the provision of vocational rehabilitation services.

NOTE: ~~*The customer can benefit in terms of an employment outcome from vocational rehabilitation services unless the counselor demonstrates on the basis of clear and convinc*~~*Prior to any determination that an applicant is unable to benefit from vocational rehabilitation services due to the severity of their disability, IDVR must assess the individual's abilities, capabilities and capacity to perform in competitive integrated employment settings to the maximum extent possible, consistent with the informed choice and rehabilitation needs of the customer, through Trial Work Experiences.*
~~*ing evidence, and only after an exploration of the customer's abilities, capabilities, and capacity to perform in work situations or an extended evaluation is carried out, that such customer is incapable of benefiting from vocational rehabilitation services in terms of an employment outcome.*~~

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

Qualified personnel are those who meet existing licensure, certification, or registration requirements applicable to the profession, this includes VRCs who meet IDVR's Comprehensive System of Personnel Development (CSPD) policy.

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

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

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

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

- Licensed Psychologist
- Chiropractor
- Naturopath
- Podiatrist
- Optometrist
- Physical Therapist
- Dentist/Orthodontist
- Advanced Certified Alcohol and Drug Counselor (ACADC) / Certified Alcohol and Drug Counselor (CADC) (restricted to identifying alcohol and drug impairment related to specific testing outcome)
- School Psychologist (limited to diagnosing eligibility for school related special education~~needs~~ services)
- Licensed Clinical Social Worker (LCSW)
- Licensed Clinical Professional Counselor (LCPC)
- Licensed Audiologist (restricted to diagnosing hearing impairments specifically related to audiological testing results when medical conditions have been ruled out)

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

Private licensing/certifying boards outside the federal/state purview cannot be used~~tilized as a~~ for ~~basis for~~ VR diagnostic purposes.

5.5.2 Social Security Presumption
Any applicant, who has been determined eligible for Social Security benefits under Title II or Title XVI of the Social Security Act, based upon their disability, is presumed to meet the

eligibility requirements for vocational rehabilitation services and is considered a customer with a significant disability.

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

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

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

When the assessment adequately documents the impairment(s), employment impediment(s) and required service(s) needed, the qualified VRC completes an Eligibility Determination in the Agency's computerized data system.

If a customer receives disability benefits under Title II or Title XVI of the Social Security Act and intends to work, IDVR presumes eligibility for services, unless, because of the significance of the customer's disability, a VRC cannot presume that VR services will enable the customer to work (must be demonstrated based on clear and convincing evidence, see Section 5.6.1 for explanation of clear and convincing evidence).

Should the significance of the disability prevent a VRC from presuming that VR services will enable the customer to work, the customer will be asked to complete a T~~t~~rial W~~w~~ork E~~e~~xperience in order for the counselor to ~~make an~~ determine eligibility.~~ determination.~~

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

5.6 Review and A~~a~~ssessment of D~~d~~ata for E~~e~~ligibility D~~d~~etermination

The eligibility determination must be based on the basic eligibility requirements and shall also ~~be based~~ include a~~on the~~ review and assessment of existing data, including: counselor observations, education records, and information provided by the customer or family, particularly information used by education officials and determinations made by officials or other agencies. Current medical records will be utilized to determine the nature and extent of the disability as well as for justification for the procurement of additional medical data when required to identify/verify alleged medical restrictions.

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

5.6.1 Eligibility/Ineligibility: For each customer determined eligible or ineligible for vocational rehabilitation services, the record of services must include a dated Eligibility Determination completed by a qualified VRC. Written notification of an ineligibility determination will be provided to the customer.

An ineligibility notification must include the reason for the determination, rights and responsibilities, Client Assistance Program (CAP) information and information and referral to other appropriate agencies, which may include referral to the other W~~w~~orkforce Development System partners. A customer should be referred to the Extended Employment Services Program for work services if the ineligibility reason is "Disability t~~T~~oo Significant to Benefit from VR Services~~everely Disabled~~."

Ineligibility decisions based upon the severity of disability must outline clear and convincing evidence and require a period of T~~t~~rial W~~w~~ork E~~e~~xperiences~~ or extended evaluation~~ prior to closure. (See Closure, Section 13)

NOTE: Clear and convincing evidence is a high degree of certainty a VR counselor has before concluding that an individual cannot benefit from VR services in terms of an employment outcome. The clear and convincing standard constitutes the highest standard used in the civil system of law. The standard is to be applied on a case-by-case basis.

The term *clear* means unequivocal. For example, the use of an intelligence test result alone would not constitute clear and convincing evidence. However, clear and convincing evidence might include a description of assessments, including situational assessments and supported employment assessments, from service providers who have concluded that they would be unable to meet the individual's needs due to the severity of the individual's disability. The demonstration of "clear and convincing evidence" must include, if appropriate, a functional assessment of skill development activities, with any necessary supports (including assistive technology), in real life settings.

It is a federal~~ly~~ requirement ~~mandated~~ that IDVR review the closure outcomes for those who are ~~of~~ "Disability t~~t~~oo Significant~~severely~~ to Benefit from VR Services ~~disabled~~" within 12 months of closure and annually thereafter, if requested. (See Section 13)

5.6.2 Trial Work Experiences (TWE) for C~~c~~ustomers with S~~s~~ignificant D~~d~~isabilities: Prior to any determination that an applicant ~~customer~~ with a disability is unable~~incapable~~ to benefit ~~of benefiting~~ from VR services in terms of an employment outcome because of the severity of ~~that customer's~~ disability, IDVR must assess the~~an exploration of that~~ customer's abilities, capabilities, and the capacity to perform in competitive integrated ~~realistic wo~~work situations, to the maximum extent possible, consistent with informed choice and rehabilitation needs of the individual.~~must be conducted to determine whether or not there is clear and convincing evidence to support such a determination.~~

In such cases a written Trial Work Experience (TWE) plan must be developed to assess and determine the above. ~~The assessment must be provided in the most integrated setting possible, consistent with the informed choice and rehabilitation needs of the customer.~~ Trial Work Experiences~~WE i~~ includes~~:~~ supported employment, on-the-job training, Community Based Work Evaluation (CBWE), and other experiences using realistic ~~situational assessment, and other experiences using realistic~~ work settings and must be of~~a~~ sufficient variety and over a sufficient period of time to ~~make such~~ determine~~ation~~ that there is sufficient evidence to conclude that the individual cannot benefit from Vocational Rehabilitation services in terms of a competitive integrated employment outcome. Appropriate supports, including assistive technology devices and services and personal assistance services to accommodate the rehabilitation needs of the customer must be provided, if needed.

Trial Work Experience is used to demonstrate whether the customer is capable of benefiting from VR services. Trial Work Experience will be conducted before Presumptive Eligibility is completed if there is a question regarding the customer's ability~~capacity~~ to benefit from services.

~~TWEs may include: Community Based Work Evaluation (CBWE), job coaching, on-the-job training, supported employment or other experiences using realistic work settings, as well as assistive technology and other needed services.~~

Review the TWE Plan at least every 90 days to determine if there is sufficient evidence to conclude that the customer can benefit from VR s~~S~~ervices in terms of an employment outcome or there is clear and convincing evidence that the customer is incapable of benefiting from VR s~~S~~ervices in terms of an employment outcome due to the severity of the disability.

Make the determination for eligibility or case closure within the 18-month time frame.

~~**5.6.3 Extended Evaluation:** Under limited circumstances if a customer cannot take advantage of trial work experiences or if options for trial work experiences have been exhausted, an Extended Evaluation (EE) must be conducted to make these determinations.~~

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

~~A. That the customer has a physical or mental impairment which constitutes or results in a substantial impediment to employment and requires VR services, and~~

~~B. That it is questionable if the customer is capable of benefiting from VR services in terms of an employment outcome because of the severity of the disability.~~

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

~~A customer will remain in extended evaluations only for the period of time required to determine if the customer can benefit from VR services in terms of an employment outcome but not to exceed eighteen (18) months. A review of the case shall be conducted as often as necessary but at least every ninety (90) days. Written documentation will be provided of determination.~~

SECTION 6.0 THE DETERMINATION OF SIGNIFICANCE OF DISABILITY

6.1 Policy

At the time a customer is determined eligible for VR services, a VRC will determine the significance of the disability and, based upon the determination, will assign the customer to a priority category. If the A~~a~~gency is not under an Order of Selection, the prioritization will be used (1) for planning purposes to ascertain services that can continue to be provided to all who are eligible and (2) to provide a structure for an easy transition to an Order of Selection, when ~~if~~ required. If the Agency is under an Order of Selection (see Field Services Policy Manual S~~s~~ection 14.0), the priority categories are used to determine the order in which customers receive services.

6.2 Definitions

Priority Categories:

Priority 1 – Eligible individuals with the Most Significant Disabilities (MSD)

Priority 2 – Eligible individuals with Significant Disabilities (SD)

Priority 3 – All other eligible individuals with Disabilities (D)

Most Significant Disability (MSD)

a. Meets the criteria established for a customer with a significant disability;

b. Experiences a severe physical and/or mental impairment that seriously limits three or more functional categories (such as mobility, work skills, self-care, interpersonal skills, communication, self-direction or work tolerance) in terms of an employment outcome; and

c. Requires multiple primary Individualized Plan for Employment (IPE) services over an extended period of time (at least 6 months).

Significant Disability (SD)

a. Meets the criteria for a customer with no significant disability;

b. Experiences a severe physical and/or mental impairment that seriously limits two or more functional categories (such as mobility, work skills, self-care, interpersonal skills, communication, self-direction or work tolerance) in terms of an employment outcome; and

c. Requires multiple primary Individualized Plan for Employment (IPE) services over an extended period of time (at least 6 months).

~~A. No Significant Disability (NSD)~~

~~B. Significant Disability (SD)~~

~~C. Most Significant Disability (MSD)~~

~~No Significant~~ Disability (~~NS~~D)

a. Who has a physical or mental impairment;

b. Whose impairment constitutes or results in a substantial impediment to employment; and

c. Who can benefit in terms of an employment outcome from the provision of vocational rehabilitation services.

~~Significant Disability (SD)~~

~~a. Meets the criteria for a customer with no significant disability;~~

~~b. Experiences a severe physical and/or mental impairment that seriously limits two or more functional categories (such as mobility, work skills, self-care, interpersonal skills, communication, self-direction or work tolerance) in terms of an employment outcome; and~~

~~c. Requires multiple primary Individualized Plan for Employment (IPE) services over an extended period of time (at least 6 months).~~

~~**Most Significant Disability (MSD)**~~

~~a. Meets the criteria established for a customer with a significant disability;~~

~~b. Experiences a severe physical and/or mental impairment that seriously limits three or more functional categories (such as mobility, work skills, self-care, interpersonal skills, communication, self-direction or work tolerance) in terms of an employment outcome; and~~

~~c. Requires multiple primary Individualized Plan for Employment (IPE) services over an extended period of time (at least 6 months).~~

NOTE~~ote~~: Customers who are beneficiaries of Social Security Disability Insurance (SSDI) or recipients of Supplemental Security Income (SSI) for disability reasons are categorized as ~~automatically classified as either~~ SD or MSD, depending upon the extent of their functional capacity~~loss category~~ limitations.

Order of Selection (OOS): When VR services cannot be provided to all eligible customers because of fiscal~~nancial~~ or personnel ~~service~~ capacity constraints, the Agency will enter an Order of Selection process that will ensure~~assure~~ that first priority is given to customers with the M~~m~~ost S~~s~~ignificant D~~d~~isabilities. *Please review Section 14.0 for details regarding Order of Selection.*

6.3 Procedures

Determination of Severity~~ignificance~~ of Disability

A VRC determines and ~~adequately~~ documents the level of severity of a customer's disability based on a review of the information gathered for~~to~~ eligibility determination~~e eligibility~~. If additional information is necessary to make the determination, a VRC may obtain the information from the customer, customer's family, an outside professional, and/or another public agency.

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

A VRC reviews the data to determine:

A. The number of functional capacity categories in terms of an employment outcome that are seriously impacted as a result of a disability;

AND

B. Whether a customer is likely to need multiple primary IPE services to prepare for, obtain, or retain~~or maintain~~ a job;

AND

C. The anticipated duration of IPE services are needed for an extended period of time (at least 6 months).

Identifying a Serious Loss of Functional Capacity

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

A. A loss of functional capacity resulting from a disability is present;

AND

B. The loss of functional capacity represents an impediment to employment;

AND

C. The loss of functional capacity meets the definition of "serious loss of functional capacity."

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

   A specific disability diagnosis does not automatically infer a serious loss of functional capacity. Although certain functional losses are commonly associated with specific disability diagnoses, the presence and seriousness of the loss is unique for each person. Therefore, a VRC must complete a thorough evaluation of loss of functional capacity for each customer.

Non-disability factors such as age, sex, race, cultural, geographic location, poor public transportation, legal history, or lack of training should not be considered when determining loss of functional capacity. It is within the VRC's judgment to determine whether limitations are disability related or not.

Self-Reported or Observed Loss of Functional Capacity

A review and assessment of existing data, including counselor observations, ~~A VRC may identify a loss of functional capacity based on a~~ information provided by the customer or the customer's family, particularly information used by education officials or ~~customer's self-report, reports from the family,~~ school representatives or others may be used to identify loss of functional capacity.~~, or based on counselor observations.~~

Counselor observations alone are not adequate to support the determination of a serious functional loss, but should be used in conjunction with supporting medical information provided by a qualified professional. If an individual reports a functional loss that is not consistent with or not supported by disability related documentation, the VRC and the individual need to discuss and reach an agreement as to how to obtain the information necessary to verify the functional loss.

For example, while interviewing an applicant who is hard of hearing, a VRC observes that the applicant is not able to effectively communicate verbally. Medical records clearly establish a hearing impairment, but do not address verbal limitations. Because a loss of functional capacity in verbal communication is consistent with and commonly associated with hearing loss, the VRC may determine, based on his or her observations, that a serious loss of functional capacity is present. To ensure the case service record explains and supports the determination, the VRC enters case narrative explaining that a loss in the area of communication was observed, a summary of the observations, and how the loss of functional capacity affects the customer.

SD/MSD Checklist

Once the VRC determines a disability-related loss of functional capacity, the VRC considers whether the loss of functional capacity meets the definition of a "serious loss of functional capacity" contained in the SD/MSD Checklist loss of functional capacity definitions. If the loss of functional capacity meets the definitions of a "serious loss of functional capacity" the VRC checks the appropriate indicator on the Checklist.

The VRC completes the SD/MSD Checklist for each customer as soon as sufficient information is available, but no later than sixty (60) days from the date of application (unless an extension has been agreed upon).
The same information gathered during the assessment process for eligibility may be used in the significance of disability determination.

An individual is classified in the highest priority category he/she meets. The determination may be re-evaluated at any time during the VR process if either the individual or the VRC believes there is a significant change in the individual's disabling condition which could result in a change of priority categories. Under an Order of Selection, a re-evaluation would never result in an individual being moved from an open service category to a closed service category.

SECTION 7.0 ASSESSMENT OF VOCATIONAL REHABILITATION NEEDS

7.1 Primary Source of Information

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

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

A. Existing information

B. Information provided by the customer and, where appropriate, by the family of the customer.

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

7.2 Comprehensive Assessment of Rehabilitation Needs

A comprehensive assessment of rehabilitation needs is a process utilized to identify the customer's strengths, resources, priorities, concerns, abilities, capabilities, interests, and informed choice as it relates to any potential vocational goal. The assessment shall be conducted in the most integrated setting possible, consistent with the informed choice of the customer.

7.2.1 Assessment of the Customer's Current Realities

The VRC and customer will evaluate the following relevant factors.

Work History:

The VRC is required to obtain a thorough work history of the customer at the time of the intake interview. The gathering of this information requires the identification of job titles, job duties/responsibilities, and length of time in each position, hiring/educational requirements, and the reasons for leaving. Some attempt should be made to assess the customer's satisfaction with the job, the employer, and co-workers.

Functional Limitations:

Functional limitations need to be clearly outlined before the customer begins the development of a vocational goal. The establishment of an appropriate vocational goal requires that both the VRC and customer are aware of and address the true barriers to employment including the customer's perception of their limitations. This involves addressing the following areas:

A. Physical limitations (lifting, walking, carrying, driving, stooping, reaching, handling, and bending)

B. Mental limitations (coping with stress, working with other people, working alone)

C. Current work tolerance

D. Acceptance of disability

E. Cognitive functioning

Personal Social & Economic Factors:

It is important for the VRC and customer to gather, document, and understand personal social and economic considerations. These considerations include:

A. Values (personal and work)

B. Family

C. Service or support agencies

D. Legal

E. Financial (current realities and future expectations)

F. Substance Use

G. Non-financial resources / supports available

It is critical to understand the personal, social and economic factors as it relates to the development of the employment goal and the IPE.

Aptitudes/Transferable Skills:

To determine an appropriate employment goal the VRC and customer must identify the aptitudes, skills, and ability that the customer possesses. The following skill areas are to be addressed:

A. Personal

- Self-management
- Self-care
- Personality characteristics

B. Functional skills – A person's level of skill working with data, people, and things.

C. Specific work skills – competencies in specific work task areas.

Many tools exist to assist the customer and the VRC to identify aptitudes and transferable skills.

7.2.2 Identification of potential employment goal, rehabilitation needs, and IPE services
The VRC and customer will evaluate a potential employment goal and identify rehabilitation needs and services required to achieve that employment goal.

Vocational Assessment:

Vocational assessment is a comprehensive process involving the VRC and the customer that focuses on functional abilities and will incorporate medical, psychological, social, vocational, educational, cultural, economic data, and real or simulated work. This is done to identify the employment goal, its overall feasibility, and the VR services that are needed to achieve that goal. Examples of vocational assessment include:

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

7.3 IPE Development:

Through the comprehensive assessment the customer has made an informed choice of his/her vocational goal. For the vocational goal to be implemented, the VRC must concur that the vocational goal is feasible. The VRC will then assist in identifying the IPE services needed to remove barriers to employment. The VRC is required to address all previously identified disability related barriers to employment. These services include but are not limited to:

A. Counseling and Guidance
B. Training
C. Medical and mental restoration
D. Disability adjustment training

E. Information and referral services
F. Interpreter services
G. Job placement assistance
H. Job readiness training
I. Job search assistance
J. Maintenance
K. On-the-job supports
L. On-the-job training
M. Other services
N. Personal attendant services
O. Reader services
P. Rehabilitation technology
Q. Technical assistance services
R. Transportation services

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

The following are essential components that need to be addressed and documented as part of the comprehensive assessment:

- Compatibility of Disability with Employment
- Skills, Interests, Aptitudes, and Abilities
- Market Analysis
- Economic Expectations and Potential for Career Growth
- Vocational Strengths and Capacities
- Customer Financial Issues
- Informed Customer Choice
- Social Support
- Training and Academic Test Results
- Rehabilitation Technology needs
- Legal barriers and industry specific requirement (criminal issues, drug and alcohol screenings, tobacco use, etc.)

7.4 Medical Consultation Policy

Medical consultants are retained by IDVR. Medical consultants can be used to review a customer's diagnostic information to determine; 1) if it is complete or if updated and/or additional medical reports are necessary; 2) to train the counselor about medical conditions; and 3) to assist in case management direction.

Examples of times to use a medical consultant are:

A. Eligibility determination
B. Plan development

C. Prior to medical restoration services
D. Whenever a VR staff member has a question about a customer's treatment, medications, or condition including such issues as the natural course of the disease or treatment options.

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

1. Present specific questions to the medical consultant; and
2. Speak knowledgeably about the customer.

Some examples of things a VR staff member may consider prior to medical consultation:

A. File medical information in chronological order with most recent on top
B. Highlight or tab important information
C. Eliminate duplicate data
D. List questions for the medical consultant

SECTION 8.0 PARTICIPATION OF CUSTOMERS IN COST OF SERVICES *BASED ON FINANCIAL NEED*

In order to further IDVR's mission to help customers move towards independence and self-sufficiency, IDVR encourages customers to be personally invested in and contribute financially towards the cost of their VR plan, when possible. The extent of the customer's participation in the cost of Vocational Rehabilitation services is based on their income and other factors. The Financial Participation Assessment is an effective tool for identifying customer resources as they relate to VR planning and implementation, regardless of the amount contributed by the customer.

Reminder: Financial need and/or participation status are not factors in the eligibility determination.

Financial Participation is assessed using IDVR's Financial Participation Assessment (FPA) Form.

1. After eligibility, during plan development, while exploring comparable benefits, AND

2. Every twelve (12) months or if financial circumstances change significantly, whichever occurs sooner.

Services Exempt from Financial Participation:
A Financial Participation Assessment will be applied as a condition for providing vocational rehabilitation services, EXCEPT for the following: (34 CFR 361.54(b) (3))

1. Assessment for determining eligibility and vocational rehabilitation needs. NOTE~~ote~~: Assessment services for determining eligibility and vocational rehabilitation needs, which are not diagnostic in nature and are provided in the trial work period (i.e., transportation), are subject to financial participation.

2. Vocational rehabilitation counseling and guidance and referral services;

3. Any auxiliary aid or services (e.g., interpreter services or reader services) that an individual with a disability requires in order for the individual to participate in the vocational rehabilitation program. Auxiliary aids and services do not include personally prescribed devices such as eye glasses, hearing aids, or wheelchairs;

4. Personal assistance services;

5. Job related services, including job search and placement assistance, job retention services, follow-up services, and follow-along services, i.e., Community Based Work Adjustment, Job Site Development (CBWAJSD), Community Based Work Adjustment (CBWA), Placement and Follow Along Job Site Development (P&FJSD), and Placement and Follow Along (P&F).

Upon completion of the FPA and the determination of services to be included on the IPE the counselor and customer will identify the specific IPE services that will be paid for by each party.

It should be emphasized to the customer and vendor that IDVR will not be responsible for the customer's debts, under any circumstances. If the customer's debts to a vendor inhibit the provision of services necessary to achieve the employment goal, IDVR will work with the customer to explore options for the continuation of services.

Exemption from Required Participation

Customers who receive SSI and/or SSDI are exempt from financial contribution. However, to ensure a customer qualifies for this exemption, written proof of SSI or SSDI qualification must be received. *It should be noted that customers who receive Social Security benefits from retirement, spouse of retired worker, child of a retired worker, child of deceased worker, widow, parent of deceased worker, spouse of disabled worker, or child of a disabled worker would not be eligible for this exemption.*

Factors for Determining Customer Financial Participation

Several factors are considered to determine a customer's level of financial participation, including the customer's and/or spouse's income, estimated annual plan costs, exclusions such as impairment related work expenses, and available financial resources which exceed the Department of Health and Human Services (HHS) Federal Poverty Guidelines.

The following steps are taken to identify the level of participation:

The applicable income is subject to two calculations. The first calculation will determine the required participation by comparing income category and expected plan costs.

The second calculation identifies an annual maximum percentage of the applicable income that the customer will be required to contribute toward their plan costs and will not exceed 25% of the applicable income.

The lower amount of the two calculations above will determine the customer's expected annual contribution. All service costs anticipated or purchased during the twelve (12) month period covered by the FPA are to be considered in aggregate rather than individually calculated.

In exceptional cases, circumstances may occur where rigid adherence to the Financial Participation Policy could seriously jeopardize the customer's opportunity to achieve rehabilitation objectives and an employment outcome. In such cases, exceptions to the policy may be considered by the RM and Chief of Field Services.

The customer, parents or legal guardian completing the Financial Participation Assessment Form will be required to provide financial documentation for verification. If the customer has a financial participation requirement, it will be applied to purchases prior to assessing any maximum agency contributions~~caps~~ from the Agency Payment Policy (Section 12.2).

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

All purchases must follow federal, state, and IDVR purchasing guidelines.

Purchases require written authorization (Authorization for Purchase (AFP)), prior to initiation of the service or the purchase of any equipment.

The responsibility for authorizing services and approving payment of those services must be assigned to separate employees.

Purchases will be made consistent with the prevention of discrimination due to race, religion, color, national origin, sex, age, and disability.

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

Consistent with procurement guidelines, a VRC cannot obligate IDVR to services that exceed his/her procurement authority. An Individualized Plan for Employment (IPE) that will include a service generating an AFP over $5,000 will require the RM's written approval of the IPE prior to the plan being approved. The VRC will inform the customer that the plan is pending approval during this process. An AFP cannot be fragmented into multiple AFP's as a way to circumvent this approval.

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

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

The following principles shall guide customer purchases:

A. The IPE is the primary document that determines the scope, duration and provider of services. The customer with a disability must agree to the terms and conditions of the IPE prior to services being provided.

B. VRCs are required to determine the rehabilitation needs of the customer first, and then determine the provider and the procurement method. Costs, availability, success, experience providing the service~~,~~ and customer research are characteristics that guide the choice of the provider.

C. The method of procurement is also determined in partnership with the customer. The Agency prefers that a state AFP be provided to the selected vendor, with an invoice from the vendor documenting the service provision. Other methods are available, given the informed choice of the customer, including reimbursement.

D. The provision of services must be consistent with the unique strengths, resources, priorities, concerns, abilities, capabilities, and informed choice of the customer.

E. All purchased services that are evaluative and restorative shall be authorized prior to the provision of services. The Agency will pay providers of medical services (both medical and psychological) based upon usual and customary fees for their area of specialization or based upon maximum agency contributions ~~payment caps~~ that have been imposed for specific services (r~~R~~eview the Payment Policy – Section 12.2 for more guidance). Customers are responsible for the cost of no-show or missed appointments. Regional Managers may approve exceptions on a case-by-case basis. Documentation of the exception is required in the case record. ~~Providers will be paid at this rate independent of the customer attending the scheduled appointment.~~

F. Staff will ensure fair and equitable treatment of all persons doing business with the Division.

G. Purchases will be made consistent with the elimination and prevention of discrimination due to race, religion, color, national origin, sex, age, and disability.

H. The responsibility for authorizing services and approving payment of these services must be assigned to separate employees.

I. The customer's record of service shall contain necessary evidence and documentation of adherence to these principles.

J. RMs are the Division's field service procurement liaisons and are responsible to ensure that staff have necessary training.

SECTION 10.0 INDIVIDUALIZED PLAN FOR EMPLOYMENT (IPE)

10.1 Options for Developing the IPE

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

A. Without the assistance from IDVR or any other entity

OR

B. With assistance from:
   a. A qualified VRC employed by IDVR.
   b. A qualified VRC who is not employed by IDVR.
   c. Other resources.

IDVR will not pay for IPE development services from other providers. IPE development must be completed on IDVR forms.

The IPE must be agreed to and signed by the customer or, as appropriate, the customer's representative, the VRC, and when required, the RM or designee. An IPE is considered approved and services initiated only after all required signatures have been obtained.

A comprehensive assessment must be competed in developing the IPE as described in section 7.2.

Customers must receive the supports that will assist them in making informed choices.

Customers shall promptly receive a copy of their initial IPE and any subsequent IPEs. Copies shall be provided in the native language of the customer or through appropriate modes of communication if appropriate.

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

An IPE can support one of the five following employment outcomes:

1. Competitive employment in the integrated labor market.
2. Self-employment
3. Integrated employment with supports

IDVR must:

1. Reinforce the ultimate purpose of the IPE: To assist the customer to prepare for, secure, retain, or regain employment.

2. Insure that the customer fully understands that she/he must participate as an active and cooperative partner in the identification and selection, through informed choice, of a vocational goal, having a reasonable expectation for marketable success.

3. Insure that the customer fully commits to participate in the implementation and completion of the IPE.

10.2 Developing the Vocational Goal:

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

10.3 Ticket to Work

When a customer has a Ticket to Work through SSA and an approved VR IPE, their ticket is automatically assigned to IDVR, unless the ticket is already assigned to another employment network (EN). If the customer has a ticket assigned to another EN prior to IDVR involvement, the customer will be requested to reassign the ticket to IDVR. If the customer does not reassign their ticket, IDVR will need a copy of the work plan from the EN that the ticket was assigned to, to ensure that no service overlap occurs. It is the customer's responsibility to provide the ticket work plan.

An Agency verification program has been implemented that informs Maximus of all SSA recipients who have been placed into an initial IPE. If a recipient has been assigned a ticket by SSA, Maximus will designate the ticket as "in usage" at the time of notification by the Agency.

The VRC should always inform the SSA recipient that the choice to participate in an active IPE program will restrict any option to assign the ticket to other employment networks (ENs) while participating in the VR program.

At closure, the VRC is not required to contact Maximus. An Agency verification program has been designed to inform Maximus of case closure. This notification will re-activate the ticket for further engagement if desired by the customer.

At successful closure, it is highly recommended that a VRC provide a list of ENs who is capable of initiating follow-along services such as “Phase 2” and or “Monthly Outcome Payment” services. By referring the customer who is earning at Substantial Gainful Activity (SGA) level at closure to an EN, the probability of agency reimbursement at the completion of nine months of employment will be increased significantly.

10.4 The IPE must include the following:

A. Using the information from the Comprehensive Assessment (Section 7.2) the VRC and customer must determine a specific employment outcome consistent with the customer’s unique strengths, resources, priorities, concerns, abilities, capabilities, career interests, and informed choice. In concert with the customer, the VRC must conduct a thorough market analysis to include job outlook and the customer’s economic expectations and needs. Planned services on the IPE should only entail those required to achieve the vocational goal.

B. The specific rehabilitation services needed to achieve the employment outcome, along with the projected dates for initiation and anticipated duration of each service, including:

   a. As appropriate, assistive technology devices, assistive technology services and personal assistance services including training in the management of those services;

   b. As provided in the most integrated setting that is appropriate for the services and is consistent with the informed choice of the eligible customer;

   c. Timelines for the achievement of the employment outcome and for the initiation of services;

   d. A description of the entity or entities chosen by the eligible customer or, as appropriate, the customer’s representative that will provide the vocational rehabilitation services and the methods to procure those services;

   e. A description of the criteria (“Plan Documentation”) that will be used to evaluate progress toward achievement of the employment outcome;

   f. The terms and conditions of the IPE, will include information describing the responsibilities of IDVR and the customer to achieve the employment outcome;

   g. The extent of the customer’s participation in paying for the costs of services;

   h. The customer is required to apply for and secure comparable services and benefits when available. The responsibilities of other comparable service and benefit entities will be listed on the IPE;

   i. As necessary, the expected need for post-employment services prior to the point of successful closure (Review Post-Employment – Section 12.14).

j. A description of the terms, conditions, and duration of the provision of post-employment services;

k. If appropriate, a statement of how post-employment services will be provided or arranged through other entities as the result of arrangements made pursuant to comparable services or benefits;

l. Supported Employment – for customers with the most severe disabilities for whom a vocational objective of supported employment has been determined appropriate, the following must be addressed:

- A description of time-limited services to be provided by IDVR not to exceed eighteen (18) months in duration, unless under special circumstances, the eligible customer and the VRC jointly agree to extend the time to achieve the employment outcome;

- A description of an identified source of funding for the extended services needed (long-term support). If it is not possible to identify the source of such funding, a statement that there is a reasonable expectation that extended services will be available. *Extended services are provided by a State agency, a private non-profit organization, employer, or other appropriate resource, from funds other than IDVR.*

m. In developing an IPE for a transition student with a disability, the IPE shall be prepared in coordination with the appropriate educational agency and will consider the student's Individualized Education Program~~Plan~~ (IEP) if one exists;

n. Completion of the IPE for all School-Work transition customers, *before they exit the school system.*

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

10.4.1 Implementation of the IPE

The VRC should ensure that the IPE is developed and implemented in a timely manner, within 90 days of the eligibility decision. *An exception may be made and must be documented on or before the plan due date if this timeframe will be exceeded due to the needs of the customer.* Documentation should include customer readiness to implement the IPE (i.e. legal, family, medical, transportation, and housing issues) and the anticipated time frame for resolution of factors delaying IPE implementation.

10.5 Annual Review

The IPE must be reviewed annually by a qualified VRC and the customer to assess the eligible customer's progress in achieving the identified employment outcome. An approved plan amendment would replace an annual review.

10.6 IPE Electronic Case Management Functions

New Plan: The "New Plan" option is utilized when completing an initial plan or when the overall nature of the IPE is changed. This would occur when a new vocational goal is chosen and there are major changes in the planned services. Any time a new vocational goal is chosen, a new comprehensive assessment case note must be completed that supports the new vocational goal. Remember: with the development of a new plan, the VRC and customer will need to include all needed services and complete the pertinent comparable benefit documentation outlined in Section 11.0.

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

Edit: There are limited circumstances when editing an IPE is allowed. When editing an IPE, a VRC, who meets CSPD standards, must document in a case note the customer's agreement with the edit of the IPE. The only two situations where an IPE can be edited are:

1. Changing the provider of a service

   Generic services can be edited on an IPE, with customer agreement, without a customer's signature, prior to the initiation to that service. Non-generic services cannot be edited. No service may be added to the IPE through the edit process.

   a. Generic services – Tutoring, computer equipment / software, auto repairs, books, transportation, community rehabilitation services, child care, clothing, academic testing, dental work, dialysis, driver's training, eye glasses, functional capacity evaluation, GED, hearing aids, information referral services, insurance, kidney related services, lab work, licensure, maintenance, medication, vocational adjustment, tools and equipment, supplies, and x-rays.

   b. Non-generic services – Medical examination, diagnostic examinations, case management, post-secondary education, medical records, counseling and guidance, treatment, evaluation, hospitalization, interpreter services, education and evaluation, therapy, OJT, other services, personal assistant services, psychological consultation, prosthetics / orthotics, rehabilitation technology, rehab engineering, self-employment technical assistance, surgery, transition planning, and vocational evaluation.

2. Changing the cost of a service

   The cost of services on the IPE can be edited if the cost increase is 10% or less for that particular service.

Plan Approval Authority:
VRCs who do not meet CSPD will continue to require RM approval for all plans. RMs may, at their discretion, delegate this function to an Assistant Regional Manager (ARM) or other senior counselors at a level 2 or 3.

Annual Review: Upon completion of annual review with customer, the VRC must complete annual review function in Case Management System.

SECTION 11.0 COMPARABLE SERVICES AND BENEFITS

11.1 Comparable Services and Benefits

Each eligible customer will be required to identify, with the VRC, all potential comparable benefits that may be available during the development of the Individualized Plan for Employment (IPE). If comparable benefits are available for VR services, including accommodations, personally prescribed devices (hearing aids, eyeglasses, or wheelchairs) and auxiliary aids and services (interpreter and reader services), they *are required to* be utilized, to meet, in whole or in part, the cost of vocational rehabilitation services. Comparable benefits and services should be utilized before IDVR agency funds are expended.

Provision of Services:

1. If comparable services or benefits exist under any other program and are available to the customer at the time needed to ensure the progress of the customer toward achieving the employment outcome in the customer's IPE, the designated State unit must use those comparable services or benefits to meet, in whole or part, the costs of the vocational rehabilitation services.

2. If comparable services or benefits exist under any other program, but are not available to the customer at the time needed to ensure the progress of the customer toward achieving the employment outcome in the customer's IPE, the designated State unit must provide vocational rehabilitation services until those comparable services and benefits become available.

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

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

B. If an immediate job placement would be lost due to a delay in the provision of comparable benefits.

11.2 Exempt Services

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

A. Medical, psychological or other examination to determine eligibility.

B. IDVR counseling, guidance, information and referral, and IDVR job related services including: job search and placement assistance, job retention services, follow-up services, and follow along services.

C. Evaluation of vocational rehabilitation potential.

D. Rehabilitation technology, including telecommunications, sensory, and other technological aids and devices. Exemption of rehabilitation technology services does not extend to auxiliary aids or services or personally prescribed devices, such as eye glasses, hearing aids, or wheelchairs.

E. Post-employment services that are outlined through A-D.

11.3 Timeliness of Comparable Benefits

If a comparable benefit exists, but is not available to the customer at the time needed to satisfy the rehabilitation objectives on the IPE due to no delay on the part of the eligible participant in seeking such benefits, IDVR may provide services until the comparable benefits become available.

SECTION 12.0 VOCATIONAL REHABILITATION SERVICES

12.1 Timeliness

The VRC and customer require adequate time to accomplish all steps in the VR process to reach a determination and approval of an agreed upon feasible vocational~~employment~~ goal. VR services, other than assessment services, are initiated when the steps to this process have been completed and a plan is in place. Sufficient time must be allowed for the completion of a comprehensive assessment prior to implementation of IPE services.

Post-Secondary Training (PST) and other IPE services are VR services that are provided when it is required for a VR customer to become a competitive applicant for an approved IPE goal. If an applicant for VR services expresses an interest in a vocational goal that requires Post-Secondary Training and the VR applicant is either already enrolled in or desires to start a PST program within six (6) months of application, IDVR reserves the right to assert that six (6) months or less may not be adequate to complete the process described above.

12.2 Agency Payment Policy

~~NOTE:~~ Many of the services listed below include *maximum agency contributions.* This section outlines in detail the payment policy of IDVR in regard to specific services. It is the policy of IDVR to pay usual, customary, and reasonable charges for services provided to its customers by providers, except for the ~~following~~ list provided in this section. An exception to the payment policy is included at the end of this section, explaining that the maximum agency contributions~~payment caps~~ established may, on occasion be exceeded. It is important to emphasize that IDVR is not obligated to pay the total cost of services required to ensure that a customer achieves an employment outcome. When available~~appropriate~~, customers are required to utilize Comparable Services and Benefits ~~and Services~~ (Section 11.0). Personal financial participation in the payment of some portion of the costs of a vocational plan may be required based upon the particular service selected as well as the identification of personal resources that could be applied toward the cost of the targeted service.

Social Security Beneficiaries (SSI or SSDI)~~:~~
Social Security disability benefits recipients are not required to participate financially towards any costs.

Applying the Financial Participation Assessment Information to Making Purchases~~:~~
If the customer has a financial participation requirement (Section 8.0), it will be applied to purchases prior to assessing any ~~cap~~maximum agency contributions from the purchasing section.

Purchasing Requirements to Procure Goods and Services~~Rates of Payment:~~

The State of Idaho purchasing statues require State agencies to purchase goods and services off of the statewide contract. This allows agencies to purchase items off of contracts at pre-negotiated prices. Therefore, before ordering goods or services for customers, staff must verify that those items are or are not on the statewide contract list. Goods and services purchased using the statewide contracts do not require three bids from vendors. If goods or services cannot be purchased through one of the statewide contracts, other vendors may be used in the competitive bid process. For those goods and services which are $500 or more, staff will need to obtain three bids. Idaho is a low bid State; therefore, the lowest bid, meeting specifications, will be the maximum amount IDVR will contribute to the purchase of goods or services.

The following items are exempt from the Department of Purchasing's requirement to use the statewide contract if the items are under $50,000, however purchasing rules still apply with regard to acquiring three bids, when available and practical.

1. Prosthetics or personally prescribed devices.
2. Tuition or training fees for individualized job-related training.
3. Vehicle modifications to meet individual mobility needs.

Rates of Payment

Fees are established in accordance with federal guidelines that permit an agency to establish maximum agency contribution ~~fee limits~~ for services designed to ensure a reasonable cost to the program for each service. ~~Whenever appropriate, a competitive process will be used to achieve a reasonable price. Idaho is a low bid State; therefore, the lowest bid, meeting specifications, will be the maximum amount IDVR will contribute to the purchase of goods or services.~~ The Payment Policy will determine the maximum that IDVR will contribute to the purchase. For items not included in the payment policy, the usual, customary and reasonable rate will be used for the service, not to exceed the rate charged other public agencies. The services that will meet the customer's need, at the least cost to IDVR, shall be the service purchased. All decisions on cases, including fee for services, are determined on an individual case basis. The customer may choose his or her preferred vendor, however if the cost of the services exceeds the maximum agency contribution~~payment rate~~ established by the Payment Policy, the customer will be responsible for the excess amount.

IDVR Payment Rates:

1. **Post-Secondary Training:** IDVR provides financial assistance for Post-Secondary Training. Listed below are maximum assistance allowances to apply toward all training and educational programs including college, university, vocational-technical, truck driving, cosmetology, business school, computer training, commercial pilot training, etc.

   The established percentage support applies to ALL tuition and fees including any associated health insurance fees.

   a. **Pell Grant/Financial Aid:** Any customer planning on attending an institution that is eligible for Pell Grant funding must complete the Free Application for Federal Student Aid (FASFA) application and receive an award or denial letter prior to any IDVR financial participation. All PELL grant proceeds must be applied first toward tuition and book expenses before IDVR assistance is provided.

      Any non-merit grants or scholarships must also be applied to tuition, fees and books before IDVR assistance is applied.

      A merit scholarship, based on academic standing or achievement, can be utilized at the student's discretion.

      Student loans, including Federal student loans, can be utilized at the student's discretion.

In situations where a comparable and accessible Pell Grant and non-Pell Grant supported programs co-exist, IDVR requires utilization of the Pell Grant supported program.

An exception for IDVR financial support to a non-Pell Grant supported program (when a comparable Pell Grant supported program exists) can be granted after review and approval by the RM if the student can show extenuating circumstances and/or other very strong rationale for attending the non-Pell Grant supported program.

b. **Tuition:** IDVR will pay up to 90% of the total tuition and fees of any Idaho Public Post-Secondary Institution.

For customers choosing out of the state or private institutions IDVR will pay up to 90% of the tuition and fees ~~up to 90%~~ of the highest Idaho Public Post-Secondary Institution offering the same program.

c. **Non-Idaho Public Education and Training Institutions:** Public or private post-secondary institutions including colleges, universities, vocational technical schools, and other educational and training institutions (see 12.5).

Normally, IDVR financial participation will be limited to equivalent rates established for in state education and training with the following exceptions;

i. If a customer's vocational goal requires an educational degree that is not available at a State of Idaho public institution, IDVR will pay a maximum of 1.5 times the rate of a single semester's tuition of the University of Idaho.

ii. If the course of study is offered in-state, because of the additional costs caused by accommodations for disability, it would be more cost effective for the Agency to support the attendance of the customer at an out-of-state educational institution; VR may pay the training rates established for out-of-state programs.

d. **Summer Sessions:** Summer sessions are generally considered optional for academic programs. Therefore additional funding is typically not allotted for summer sessions.

Payment for a summer session will be considered with approval from the RM. Maximum assistance rates will be established according to the length of the term, i.e. semester, trimester, quarter. Approval or denial for summer school assistance will be considered if it meets any of the following conditions;

i. IDVR may pay for summer session if it is a required part of a program.

ii. IDVR may pay for summer session in exceptional cases where a disability-related reasonable accommodation is verified.

iii. IDVR may pay for an additional summer session if by attending the session the customer will be able to complete the college or university degree program by the end of that session.

iv. IDVR may pay for a summer session if by attending the session the customer will be able to complete the college or university degree program within the timelines identified on the IPE.

2. **Books:**
Where available and feasible, customers are required to use rental text books or e-books. Customers are required to adhere to the rental agreement.~~All rented books need to be returned – customer will be billed when books are not returned.~~

If unavailable for rent or e-book format, some text books may need to be purchased. The expectation is that used books will be purchased when available. ~~All books purchased by IDVR must be returned to IDVR unless negotiated previously with VRC (where the book may be used for additional classes, reference, or for disability reasons).~~

IDVR will pay up to actual cost of~~a maximum of 90% of t~~ the text books. If non-merit grant funds are remaining after paying tuition and fees they must be applied to books.

3. **Medical Insurance for students in post-secondary education:** IDVR may pay for medical insurance for students while attending an institution that requires medical insurance. If the student has medical insurance or can obtain medical insurance that meets the institutions requirement, IDVR will not pay for medical insurance.

Note to staff: this must be issued as a separate authorization and classified as insurance.

4. **Medical exams with written report:**

a. General Physical exam - $~~65~~ 90 maximum
b. Specialist exam by M.D. - $350 maximum, plus actual cost of related procedures (e.g. x-rays).

5. **Psychiatric Evaluations:** $250 maximum for the evaluation plus one medication monitoring sessions that is considered a diagnostic.

6. **Psychological Exam by Licensed Psychologist:** $~~2~~300 maximum plus actual cost of psychometric tests.

7. **Ophthalmologist:** The specialist fee ($350) for an ophthalmologist will be authorized when diseases of the eye are present and cannot be dealt with by an Optometrist.

8. **Optometrist:** Maximum fees are established for general visual exam, accompanying test, frames and glasses. Tinted glasses require a prescription for IDVR payment.

Procedure Fees:
Visual Exam $~~85~~90
Frames w/ Single Vision Lenses (per pair) $180~~65~~
Frames w/ Bifocal Lenses (per pair) $200~~185~~
Frames w/ Trifocal Lenses (per pair) $23~~1~~0
Contact Lenses – Contact lenses cannot be purchased for clients unless there is documentation by an Ophthalmologist or Optometrist that there is a medical or visual need. Maximum assistance - $125

9. **Psychotherapy / Counseling Sessions:** IDVR recognizes the benefits of additional training, education, and credentialing and has established the following payment policy for customer psychotherapy and counseling.

   a. Doctorate level licensed psychologist up to $100.00 per session.

   b. Masters level clinician (to include LPC, LCPC, MSW, LCSW, and ACADC) up to $80.00 per session.

   c. Bachelor's level counselor (CADC) up to $6~~4~~0.00 per session.

   d. Group Counseling – IDVR also recognizes the importance of group counseling as a part of mental health restoration and as a supplement to customer counseling. The following payment policy has been established for group counseling (not to include family counseling). Group counseling up to $4~~25~~0.00 per session.

   The maximum that can be spent on any psychotherapy or counseling services is $1,000.00 for the life of the case.

10. **Medication and Medication Monitoring:**

    Maximum: 3 months of medication identified on an IPE with one additional month if needed for diagnostic purposes, for a total of 4 months, while customer applies for reduced cost or free medication programs provided by drug companies or other sources of comparable benefits.

    Maximum: 5 sessions of medication monitoring identified on an IPE. This does not include the one follow-up that is part of the evaluation.

11. **Dental Work:** including but not limited to, fillings, extractions, crowns, and dentures. Dental Work would need to create an impediment to employment and must be appropriate to the identified employment goal.

    Maximum: $500 per case

12. Hearing Aids:

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

Audiologist exam: $85.00 maximum

13. Transportation:

a. Public conveyance (bus, van) – Actual cost of service
b. Private vehicle not to exceed $60 maximum per month within a 20 mile radius or up to a maximum of $200 per month outside the 20 mile radius.
c. Taxi Services – In areas without public conveyance, IDVR will not exceed $60 maximum per month.

14. Car Repairs: Maximum: $300 per case (except for cost of reasonable accommodation for disability). IDVR will not pay for customary general car maintenance (i.e. oil changes, tire rotations, etc.).

15. Auto Insurance: Maximum six (6) months of auto insurance. VR will only pay necessary auto insurance required to cover the VR customer as a vehicle operator.

16. Vehicle Purchase:

Maximum: $5,000

- IDVR does not purchase new vehicles (12.9).

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

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

Maximum: $2,000 total per Federal fiscal year.

18. Copy Fees:

Maximum: $25 for a copy of records or reports.

19. Community Rehabilitation Programs (CRPs):

a. Maximum hourly rate for community based services - $47.80/hour.

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

RMs can approve exceptions to the following limits:

- All types of Job Site Development - maximum 40 hours per strategy.
- Community Based Work Evaluation (CBWE) – maximum 40 hours.
- Community Based Work Adjustment (CBWA) – maximum 40 hours.
- Placement & Follow Along (P&F) – maximum 15 hours.
- Community Supported Employment (CSE) Job Coaching – maximum 40 hours.

b. Maximum daily rate for in-house work evaluation, work adjustment - $69.55/day.

20. Tools & Equipment:

Maximum: $1,500 per case. The A~~A~~gency's existing inventory of tools and equipment will count towards the $1,500 maximum. *The VRC must always negotiate in the best interest of the agency on cost services and must use the statewide contract or obtain~~get~~ three bids, if vendors are available, on all durable equipment (reusable) valued at $500 or more.*

Tools will need to be required for training or employment and must be verified by the school or employer.

Exception: If there is a change in employment outcome, the customer must return the original tools to VR. After the tools have been returned, ~~then~~ VR may then purchase new tools up to the $1,500 maximum for the new vocational goal.~~employment outcome.~~

NOTE: *A Property Agreement must be secured on all durable equipment or reusable supplies that is ~~exceed~~ $500 or more in value.*

21. On-the-Job Training (OJT) Fees:
(See section 12.5 On-The-Job Training)

Maximum: $3,000 for a salary of $9.00 per hour and under; ~~-~~$5,000 for a salary between $9.01 - $15.00 per hour; $7,500 for a salary of $15.01 or more. There is a 20 hour a week minimum.

a. The VRC must negotiate OJT fees based on:
   - Employer's cost to train the individual above the normal level of training
   - Level of technical skills required for job

- Number of hours worked

b. The Individualized Plan for Employment (IPE) and OJT Agreement must include:
   - Cost of training
   - Length of time (# of months)

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

22. Computers including hardware and software:

Maximum: $500 per case, except for disability related assistive technology. Standard use computers are required to use the statewide contract.

23. Self-Employment Plans – (see Section 12.10)

24. Child Care:

Maximum: Up to $300 per month per case.

25. Reimbursements for Fines:

IDVR will not pay for costs associated or incurred due to illegal behavior (fines, restitution, and reinstatements due to legal related suspensions).

26. Advanced Degree:

IDVR may assist with an advanced degree based upon the rehabilitation needs of the customer. (See section 12.5)

27. Typical exclusions from VR financial participation:

a. Securing a private pilot's license

b. Organ transplantation

c. Surgery; Surgery may be provided if it is not the sole vocational rehabilitation service needed for the customer to return to work or to achieve an employment outcome.

IDVR will only cover the cost of surgery if it will substantially reduce functional limitations. It is highly practical and appropriate for the VRC to explore alternative employment opportunities with the customers that may negate the need for the corrective surgery. Such an alternative should accommodate the customer's functional restrictions and provide a level of income that would be comparable with potential earnings following a surgery.

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

28. No-~~-~~Show or Missed Appointments:

If a customer does not attend an appointment and does not cancel or reschedule the appointment (within the parameters of the provider)~~,~~ the customer will be responsible for payment of any charges~~-~~ – not VR. Regional Managers may approve exceptions on a case-by-case basis. Documentation of the exception is required in the case record.

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

Exception to Maximum Agency Contribution~~Rate of Pay~~ Policy:
The Rehabilitation Act of 1973, as amended, requires that IDVR have a policy that allows for exceptions to the Payment Policy, unless the exception would violate State or Federal laws. All exceptions will be reviewed on an individual case basis.

Exception to Maximum Agency Contribution ~~Rate of Pay~~ Process:
To be considered for an exception, the customer and VRC should first seek approval from the RM. RMs have the authority to approve an~~the~~ exception as long the exception is not more than 50% of the maximum agency contribution~~service cap~~. Greater than 50% of the maximum agency contribution ~~service cap~~ will require the approval of the Chief of Field

Services. The RM shall submit the request for the exception in writing to the Chief of Field Services.

The request must include:

1. A description of the requested exception.

Detailed reasons why the customer, VRC and manager (when appropriate) believe the exception is warranted. The Chief of Field Services (or RM when appropriate) will have ten (10) days from the date of receipt of the request to make a decision. If the request is approved, written notification will be sent to the RM (when appropriate) and this will be placed in the case file.

The Chief of Field Services reserves the right to deny any request.

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

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

1. The need is disability related.

2. The customer has used all sources available; including his/her own financial contribution, as well as all available Federal Financial Aid for~~in~~ post-secondary training~~ situation~~, insurance, Medicaid, Medicare, and other resources typically used by persons without disabilities.

3. Changes in circumstances resulting in loss of income or support making previously available resources unavailable.

4. Service is not available, in certain geographical locations of the state, within the maximum agency contributions ~~Payment p~~Policy~~ maximums~~.

12.3 Counseling and Guidance

IDVR recognizes that vocational counseling and guidance is the key element in the rehabilitation process in that it is the method for involving the customer and significant others in that process. It begins when the customer contacts the agency and does not end until closure as successfully rehabilitated or through the completion of the post-employment period.

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

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

A. Medical and psychological information.

B. Vocational evaluation information including labor market information, job analysis, aptitude and interest information, situational assessments and trail work experiences.

C. Analysis of transferable skills.

D. Rehabilitation technology, including rehabilitation engineering.

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

Counseling will be provided in a respectful manner encompassing the core conditions of helping. These will include unconditional positive regard, genuineness and congruence. Counselors will always maintain a professional demeanor and not allow counseling issues to become personal. Counselors are to follow the canons of ethical behavior and practice outlined by the Commission on Rehabilitation Counselor Certification (CRCC) Code of Ethics.

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

12.4 Physical and Mental Restoration Services

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

Current maximum financial contributions by IDVR for specified services can be found in the "Payment Policy" section 12.2 of the manual (See also section 12.2 "Typical Exclusions" and section "Comparable Benefits"). For all other services listed below, IDVR will pay the prevailing "Usual and Customary" charges after a comprehensive assessment of potential or available comparable benefits and resources has been conducted.

12.4.1 Concurrent Acute or Chronic Conditions Arising from Physical or Mental Restoration: Services necessary to assist with acute treatment or care for a condition associated with or arising from physical and mental restoration services that are on the IPE. Comparable benefits will always be explored prior to authorization of this service. *The medical consultant should be utilized to determine the medical rationale for such services whenever possible.*

These services should be provided in the least intensive medical environment appropriate.

In the case of a chronic condition which does not appear to be resolving in a reasonable amount of time, consultation with the medical consultant should be used to determine whether a case should be closed.

12.5 Training Services

12.5.1 Disability Related Training Services

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

12.5.2 Post-Secondary Training

Post-Secondary training is provided when necessary to become a competitive applicant for an agreed upon IPE goal that reflects the customer's interests and informed choice to the extent that those factors are consistent with a customer's strengths, resources, priorities, concerns, capabilities and abilities. IDVR may support graduate study when the customer's employment objective is otherwise unachievable.

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

All non-merit scholarships and grants to be applied to tuition, books and fees as a first dollar source, prior to the consideration of expenditures of IDVR funds. Merit based funding may be applied to any legitimate college costs as determined by the customer, with no comparable benefit test required.

When IDVR has a joint case with another VR agency (Veterans Administration, Tribal Vocational Rehabilitation, Idaho Commission for the Blind and Visually Impaired, or another state VR agency) the sharing of case cost shall be done in a way that multiple agencies are not paying for the same service.

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

Customers are required to submit an application for FAFSA whether or not they believe they are eligible for funding. *This process should occur along with the verification of determination of eligibility/ineligibility for financial aid prior to IDVR developing an Individualized Plan of Employment (IPE) and participating in financial assistance for a post-secondary education.*

12.5.2.1 Out of State Training
Out-of-State Post-Secondary Education

a. If the VR customer must attend an out-of-state institution because the course of study is not offered within the state of Idaho, please see section 12.2.

b. If the course of study is offered in-state, but because of the additional costs caused by the accommodation for disability, it would be more cost effective for the agency to have the customer attend the out-of-state educational institute, see section 12.2.

c. If the customer chooses to attend an out-of-state institution when comparable training is clearly available in the state, see section 12.2.

12.5.2.2 Progress Measures
Customers must maintain a term and cumulative grade point average that meets the school's academic requirements, program entry requirements, or a minimum of 2.0 GPA whichever is higher and must demonstrate timely progress towards meeting the goal of the IPE. ~~The~~ VR financial participation for education/training~~towards schooling~~ may be paused if academic progress is such that the customer will not qualify for entry into the program stated on their IPE.

If the customer is placed on academic probation, or does not meet the standards stated above, s/he has one grade~~ing~~ period in which to attain good standing. IDVR financial participation will terminate after that grade~~ing~~ period until the customer achieves good standing.

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

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

IDVR post-secondary educational support will cease if the customer has an expulsion for academic dishonesty.

12.5.2.3 Loan Default
VR funds may not be utilized to pay for post-secondary education if a customer has defaulted on a State or Federal student loan. If a good faith effort is being made to come out of default status, VR funding may be available. The university or college financial aid office may be able to assist in unusual circumstances. Additional information can be obtained at the U.S. Department of Education website http://studentaid.ed.gov, section "Repay Your Loans."

12.5.2.4 Loan Deferment
Consumers may be eligible for temporary suspension of loan payments during specific conditions such as, returning to school, unemployment, disability, or military service. Additional information may be sought through the Financial Aid Office at the school the student plans to attend.

12.5.2.5 On-the-Job-Training (OJT)
An OJT is for a customer who~~that~~ is hired by an employer who~~that~~ needs specific training to achieve the employer's expectations. On-the-job training requires the completion and signing of the IDVR OJT Agreement between the customer, counselor, and employer, which states the hourly wage, the specific training needs, responsibility for Workers' Compensation coverage and any other conditions of employment. IDVR pays a training fee for OJT, not reimbursement or wages.

12.6 Benefits Counseling

Benefits counseling includes an informed discussion of the customer's benefits, employment status, consideration of work incentives, and the impact on existing or potential benefits a change in employment may create. All social security recipients should receive benefits counseling services.

12.7 On-the-Job-Supports

On-the-job-support services are provided to a customer who has been placed in employment in order to stabilize the placement and enhance job retention. Such services include; job coaching, follow-up and follow-along, and job retention services.

12.8 Job Placement of Customers

All customers have the obligation to be involved in their own job search activities to the fullest extent possible. The customer and the VRC will work together to identify the supports necessary for job search and placement. Some of the job search activities could include:

- Communication and presentation skills.
- Gaining access to and using information.
- Introducing customers to specific programs such as job centers.
- Gaining networking skills.
- Use of online job search and applications.
- Community Rehabilitation Provider (CRP) services.

- Providing information around Federal and State employment opportunities.

IDVR does not pay fees to private staffing/employment agencies.

12.8.1 Community Rehabilitation Providers (CRPs)
Community Rehabilitation Providers may be used to assist a customer as they prepare to obtain or maintain employment. CRP services may only be provided if they are agreed to by customer, VRC, and CRP. The CRP services should be consistent with the customer's unique strengths, resources, priorities, concerns, abilities, capabilities, interests, and be the informed choice of the customer. Potential employers contacted by the CRP should be informed of the CRPs contractual relationship with IDVR. If workplace accommodation or assistive technology needs are identified for a customer, IDVR staff will be involved in addressing the accommodation needs with the employer (this is not referring to job coaching accommodations).

If services are contracted out to a CRP:

1. The customer and VRC will review the available list of CRP vendors and the services offered by each and will make a selection. This process should be noted as "customer choice" when documenting the choice of the CRP vendor and services to be provided. The customer will sign an information release form authorizing communication between the selected vendor and IDVR.

2. The customer and VRC will contact the CRP to discuss required services, negotiate and agree upon time frames and costs.

3. The VRC will submit referral information necessary for the CRP to provide the agreed upon services.

4. The customer, VRC, and CRP will have a staffing prior to initiating services (this staffing can be by phone or in person).

5. The VRC and customer will develop and agree to regularly scheduled contacts while receiving CRP services (minimum once a month).

6. The customer, VRC, and CRP will mutually agree upon frequency of contacts to monitor progress, quality, and duration of services provided.

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

12.8.2 Schedule A Appointing Authority in the Federal Government
5 CFR 213.3102 (t) (cognitive impairment), (u) (severe physical disabilities), and (gg) (psychiatric disabilities) are combined into one streamlined authority, 5 CFR 213.3102 (u). This

authority is used to appoint persons who are certified that they are at a severe disadvantage in obtaining employment because of disrupted employment due to hospitalization or outpatient treatment for the severe disabilities listed above.

Appointment and Certification Process

IDVR can assist customers with disabilities (whether IDVR customers or not) in completing the Schedule A process. Information on how to assist customers with disabilities with the Schedule A process can be found at: www.eeoc.gov/eeoc/initiatives/lead/upload/abc_applicants_with_disabilities.cfm or http://www.opm.gov/disability/appointment_disabilities.asp

12.8.3 Alternative Hire Process for Employment with State Government
Within the IDAPA rules (15.04.01) of the Division of Human Resources and Idaho Personnel Commission exists the provisions and protocol entitled: 097 "Alternative Examination Process for Persons with Disabilities," under this rule:

1. The VRC determines the need for the Alternative Hire process by documenting that the customer cannot competitively compete for the job due to a disability(ies).

2. The VRC determines that the customer meets the criteria for the alternative hire program.

    - Disability limits one or more functional areas.
    - The customer meets the qualifications of the class.
    - The customer lacks competitiveness in the normal hiring process due to disability.

3. The VRC will complete the Application for the Alternative Hire Program Form. Include a letter to Idaho Division of Human Resources (DHR) explaining why the customer cannot compete through the normal examination process due to his/her disability. The examination process includes application, testing, and interviewing.

4. The VRC will staff the case with the RM for approval. The RM will subsequently forward the application to the VR Administrator for final approval.

5. IDVR Administrator approves/disapproves. If approved, the application will be forwarded to the Administrator of the Division of Human Resources for final review.

6. Upon approval from DHR, the VRC proceeds with the Alternative Hiring Process to the hiring authority.

NOTE~~ote~~: This process requires the use of the "Alternative Hire Application."

12.9 Vehicle Purchase

Vehicle purchase may be provided if it is not the sole vocational rehabilitation service needed for the customer to return to work or to achieve an employment outcome. The vehicle purchased will be only at a level to meet the vocational rehabilitation need of the customer. If the customer desires a vehicle above and beyond the level of vehicle needed to meet the vocational rehabilitation need they will be required to pay the cost difference between the two. This amount would not count towards the customer's financial participation requirements and IDVR will not be party to associated financial obligations.

Purchase of vehicles for a customer is allowable only when the occupation of the customer will require a vehicle as occupational equipment. The agency may not purchase a vehicle for a routine need for transportation to and from a place of employment.

The vehicle will be purchased after all other aspects of the IPE necessary to achieve the employment goal have been completed.

Vehicle purchases require approval from the RM and Chief of Field Services prior to agreeing to the purchase for the customer. The VRC will be required to document responses to the following:

- How the purchase is essential to the achievement of a successful employment outcome.
- Whether the vehicle is required as a condition for employment or why it is needed to achieve an employment outcome.
- An explanation of the transportation alternatives explored and the reason(s) these options will not meet the customer's needs.
- A summary of other resources explored, such as insurance, a PASS Plan for customer receiving SSI/SSDI, or other sources, and how these resources will be utilized.
- The customer's disability is stable or slowly progressive and is not likely to impair his or her ability to drive in the foreseeable future.
- If the customer has a known pattern of alcohol or drug abuse within the past 5 years, whether in remission or not, a complete and current drug/alcohol evaluation included.
- An abstract of the driver's complete driving record obtained from the Department of Motor Vehicles. Citations other than parking tickets and minor traffic offenses may impact approval.
- Current Idaho driver's license of the person who will be driving the vehicle.
- Verification of customer's driving capacity as demonstrated through modified driving assessment or significant demonstrated safe driving history under current functional capacities.
- Verification of the customer's financial ability to pay for the fuel, license and registration, insurance, and vehicle maintenance. This will require an insurance quote appropriately reflecting vehicle usage. Additionally, the customer will have to develop a plan for how they will replace the vehicle in the future as part of the feasibility review. If

the customer does not have a method to replace and/or repair the vehicle if an accident occurs, the customer will show the ability to provide comprehensive insurance.

- The type of vehicle being considered (estimated price range and any special considerations). IDVR does not purchase new vehicles or vehicles that require above an Idaho Class D operator's license.

NOTE~~ote~~: *IDVR does not purchase vehicles to address geographical or other barriers that are not disability related.*

Following the decision to purchase the vehicle:

- Must follow all state and IDVR purchasing guidelines.
- IDVR will only authorize purchase vehicles from licensed dealerships.
- An inspection of the vehicle prior to purchase from a qualified mechanic is required. Also, obtaining a Car Fax is required.
- The vehicle title will be granted to the customer upon proof of insurance and all appropriate licensing (a tool agreement is not required).
- Every six (6) months the customer must show proof of insurance and maintenance until case closure.

IDVR has no further obligation to purchase any future vehicles due to customer negligence.

12.10 Self-Employment Policy

Introduction

The primary goal of the IDVR is to assist the customer in attaining a suitable competitive employment outcome that results in financial self-sufficiency. Self-Employment is one option that may be considered to assist the customer in selecting a vocational goal.

The impediment created by the customer's disability must be addressed in the overall comprehensive assessment leading up to Individualized Plan of Employment (IPE).

The successful self-employment enterprise is operated by a participant who can demonstrate an array of skills and abilities, including; organization, business and financial management, marketing and other talents, as well as, knowledge and expertise in the goods or services being produced. These may be accomplished through natural supports or other resources and would need to be included in the self-employment plan. It is essential that the participant is well informed of potential risks and that efforts are made to minimize those risks.

A vocational evaluation/career exploration may be used as a method of assisting the customer and VRC in deciding if self-employment is a possible viable option. Vocational evaluators have a variety of instruments, work samples, inventories and other strategies to use in providing feedback and information related to self-employment.

There may be a need for VR services prior to a commitment from IDVR on a self-employment plan. It could be appropriate for IDVR to assist a customer in services, such as training needed for certain skills or business knowledge before the decision is made by the customer and VRC to pursue the development of a business plan.

IDVR values self-employment as a viable vocational outcome. Self-employment is presented by the VRC within the repertoire of vocational options and may be considered by customers and VRCs as they work toward the development of an appropriate vocational goal.

IDVR supports active, not passive or speculative, self-employment goals.

General Self-Employment Process and Flow Chart

The following steps will be required for all self-employment. The nature and extent of activities within each step will vary by the type and complexity of the self-employment business goal.

1. **Assessment of Customer's Appropriateness for Self-Employment**
2. **Writing an IPE – Developing a Business Plan**
3. **Amending IPE - Implementing the Business Plan**
4. **Closure of Self-Employment Case**

Definitions

a. **Business Plan –** A detailed outline of the business description, objectives, organization, product or service description, summary of Customer qualifications, **a**nalysis of the potential business environment and market, management and organizational structure, and financial plan.

   The level of detail required for the various components of the business plan will vary depending upon the type of self-employment being pursued.

b. **Contracting and Sub-Contracting –** When the VR customer works with a company under a limited or contract basis for either short or long term employment, but is not a company employee. There are some types of employment goals that could be sub-contractors or a standalone business. Examples of likely contracting and sub-contractors opportunities include but are not limited to:
   - Realtor
   - Construction trades
   - Cosmetology, nail tech, and hair stylist
   - Paper delivery
   - Tattoo artist

   This is a type of start-up self-employment that will often be processed as a low cost, low risk, low complexity self-employment plan.

c. **Continued Self-Employment –** Employment where the VR customer is presently or recently (within the last year) engaged in a *successful* self-employed business as identified by the customer and feasibility of the business is recognized by IDVR. In this scenario, the IPE services will address *disability related barriers* to employment. IPE will be written as maintaining employment.

Any capitalization of the business will require the use of low cost/low risk/low complexity, complex, or supported self-employment strategy.

d. Feasibility Analysis – Provides an in-depth analysis of the business concept, the market, the financial investment and income potential. In addition, the feasibility analysis considers:

- Financial resources, skills and history of the customer as it relates to successfully operating a small business
- The need for customer training
- The availability of strong support network for long-term business success
- The need for a comprehensive business plan
- The likelihood of sustainability in a reasonable amount of time (what is a reasonable amount of time will likely vary by the type of self-employment)

The feasibility analysis offers the VRC and customer a comprehensive, objective evaluation of the strength of the proposed self-employment venture.

e. Forms of Organization - refers to the way the individual legally organizes the business

i. *Sole Proprietorship* - one person who owns the business alone, but may have employees. She/he will have unlimited liability for all debts of the business, and the income or loss from the business will be reported on his or her personal income tax return along with all other income and expense she/he normally reports (although it will be on a separate schedule).

ii. *Corporation* – requires a legal filing with the Internal Revenue Service for corporate status. Corporate organization provides limited liability for the investors. Shareholders in a corporation are obligated for the debts of the corporation; creditors can look only to the corporation's assets for payment. The corporation files its own tax return and pays taxes on its income.

- VR customers who legally organize their businesses as a corporation, and are employed by their corporation may be eligible while in the startup phase of operations.

iii. *General and Limited Partnerships* – two or more individuals, one of which is a customer of IDVR with the controlling share (see Eligibility Requirements for Self Employment).

iv. *Limited Liability Company* - limited liability for all of its members (business partners), with the IDVR customer as the controlling member.

f. Hobby - customers identifying business-related goals that indicate a business activity that is:

- Operated for recreation and/or pleasure.
- Not projected to be profitable.
- Not seeking profitability.

- Neither operating nor carrying on activity in a business-like manner.
- Not depending on activity for livelihood.

g. **Low Cost / Low Risk / Low Complexity Self-Employment –** A comprehensive business plan is not required if a feasibility analysis report indicates the business concepts represents a (1) low cost (under $5,000) total cost of anticipated self-employment start-up, (2) low risk (strong likelihood of success) and (3) low complexity (few and clearly identifiable barriers to self-employment). Examples of self-employment ventures that may not require a comprehensive business plan include:

  - A VR customer is already self-employed and has demonstrated skills and abilities to successfully manage the business, and VR services are needed to retain employment due to a disability-related condition.

  - The VR customer has previous experience being self-employed in the same or similar field and start-up needs are minimal.

  - The VR customer has skills and experience in a trade and needs minimal training and services for startup, such as, lawn care, pressure washing, window washing, and bookkeeping.

  - A VR customer has experience or training in a trade and will lease space or sub-contract with an existing business and pay their own taxes, i.e., massage therapist, manicurist, cosmetologist, real estate agent.

h. **Complex Self Employment** – All self-employment plans that do not meet the criteria for low cost/low risk/low complexity, continued self-employment or supported self-employment fall under this category.

i. **Multi-Level Marketing** – As a marketing strategy, in which a person is compensated not only for sales they personally generate, but also for the sales of others they recruit into a business venture, creating a "down line" of distributors and a hierarchy of multiple levels of compensation.

j. **Natural Supports –** Long term supports provided by individuals naturally invested in the success of the VR customer (family and friends).

k. **Startup Self-Employment -** refers to an employment outcome in which a customer works in a business that she/he starts, owns, operates, and manages with the intention of being profitable.

l. **Supported Self-Employment –** refers to an employment outcome in which a customer works in a business that she/he owns, operates, and manages with natural or long term supports, with the intention of being profitable.

Eligibility Requirements

Participation in self-employment or supported self-employment as a vocational goal requires that:

1. The business venture is, at a minimum, 51% owned, controlled and managed by the IDVR customer. For those in supported self-employment, some IDVR customers may require the assistance of a guardian or conservator in controlling or managing a business.

2. Businesses must be organized as Sole Proprietorships, Corporations, General and Limited Partnerships, and Limited Liability Companies, as noted in Definitions-Forms of Organization.

3. The business venture is considered legal in all jurisdictions in which it operates (Federal, Tribal, State and local Governments). This includes business and other necessary licenses.

4. The business venture is accurately reporting to appropriate government agencies, including the Internal Revenue Service and State taxing agency or other applicable

5. State or local authorities.

6. The business venture is organized as a for-profit entity.

Financial Participation Requirements

Social Security beneficiaries are not required to financially participate towards the cost of their self-employment plan.

IDVR customers have a variety of sources to obtain their portion of the business costs. Some of these include:

- Investment of funds from microloans;
- Commercial and consumer loans;
- Loans from family;
- Forgivable loans;
- Equity grants;
- Equipment critical to the business operation;
- Inventory;
- Supplies;
- Facility (including fair value of existing facility in which the business will be operated)

a. In consideration of the business start-up capitalization noted in the Business Plan, financial participation by IDVR and VR customer for the entirety of the self-employment plan, per case is as follows:

Business Capitalization	Maximum IDVR Financial Assistance	Minimum Customer Participation
Under $2,500	100%	0%
$2,501 to $5,000	80% of startup capital	20%
$5,001 to $7,500	70% of startup capital	30%
$7,501 to $10,000	60% of startup capital	40%
$10,001 and up	50% of startup capital	50%

If IDVR's portion for business start-up and capitalization is more than $10,000, the Chief of Field Services must provide approval.

b. Financial participation will not be required for IDVR investment in:
   - Training and technical assistance.
   - Accommodations necessitated by the customer's disability in order to participate in training, technical assistance or in consideration of financial assistance.

Limitations and Restrictions

Services provided under a Self-Employment Plan must adhere to the stipulations of the Agency's Payment Policy (Section12.2) and the maximum agency contributions. Financial assistance for business start-up capitalization does not include:

1. Funding for speculative real estate development.
2. Deposits that are refundable to the customer or business.
3. Cash.
4. Salary or benefits for the customer, partners in ownership, or any employees of the business.
5. Purchase of real estate.
6. Erection of buildings.
7. Inventory or business supplies that include tobacco, firearms or alcoholic beverages.
8. Refinancing of existing debt – business or personal.
9. Business continuation expenses subsequent to the initial start-up costs.

10. IDVR does not support a customer hobby as a self-employment goal.

Self-employment involving payment for registration, legal services, patents, trademarks, copyrights, or franchise fees require an exception to policy approved by the Chief of Field Services.

Multi-Level Marketing plans are often similar to illegal pyramid schemes; therefore, VRCs are cautioned about supporting self-employment businesses with a multi-level marketing structure. Support for multi-level marketing businesses may be appropriate when the emphasis is on sales by the VR customer versus recruitment of down line distributors.

Types of Self-Employment

A. Start-up Business

a. Low Cost / Low Risk / Low Complexity Business Plan

I. Role of IDVR

When working with customers expressing an interest in self-employment the primary role of IDVR is to:

- Provide relevant information regarding the availability of self-employment services supported by the agency.
- Assist the customer in information gathering and assessment in deciding whether self-employment is an appropriate option to achieve their employment goal.
- Assess the customer's disability as it relates to the self-employment goal.
- Reduce or eliminate barriers to self-employment created by the disability.
- May authorize for the provision of external technical assistance including, but not limited to, business feasibility, training, business planning, and post start-up monitoring.
- Participate with the customer and external technical assistance to evaluate the feasibility of the business.
- Coordinate training and technical assistance services.
- Provide technical assistance as deemed appropriate at post start-up of the business.
- Monitor business development at post start-up.

II. Role of the IDVR Customer

Customer responsibilities, as part of the informed choice process relating to self-employment, include but are not limited to:

- Determining the concept of the business.
- Participating in the assessment process.
- Exploring the feasibility of the business venture. This may include gathering information, market feasibility, and likelihood of financial sustainability. This may include; collaboration with technical assistance.
- Writing the business plan with or without technical assistance and approval by the VRC.
- Contributing, as appropriate, financially to the capitalization of the business venture by utilizing all available financial resources.
- Assisting in the identification of existing and potential barriers including those created by the disability, as well as identifying possible solutions.
- Developing skills and abilities necessary to operate and sustain the business venture.
- Business implementation and management.
- Providing regular financial or other relevant documentation or information requested by the agency for post star-up monitoring.
- Fulfilling participation in the business start-up as noted in the Individualized Plan of Employment (IPE).

III. Assessment of IDVR Customer's Appropriateness for Self Employment

- Evaluation of the customer's interests, skills, aptitudes, and personality traits as they relate to self-employment. This may include; a) use of data gathering instruments, and b) formal vocational assessment to the degree necessary to ensure the customer has the basic skills necessary to operate and manage a small business.
- Ensure the viability of self-employment as it relates to the customer's ability to handle the physical, mental, emotional, and cognitive aspects of the business venture including their disability. This may require consultation with medical and/or psychological service providers that have been treating the customer. If clear information is not available additional assessments may be needed.
- Examination of the customer's financial goals related to self-employment should include consideration of issues such as impact on government benefits,

supplementing family income versus primary source of support, and earning sufficient funds to maintain competitive employment standards. A referral for benefits planning may be appropriate.

IV. Writing an IPE – Developing a Business Plan

After a positive assessment of the feasibility of the business concept an initial IPE is written. Some of the key components of writing an IPE for business plan development include:

- IPE goal will be the anticipated vocational outcome that is the focus of the business plan.

- IPE must be identified as a self-employment IPE.

- Comprehensive assessment for this IPE is based on the appropriateness of self-employment as a strategy for the individual VR customer. It should be based on the feasibility analysis, the assessment of the customer's appropriateness for self-employment, and other information available.

Services provided as part of this IPE are intended to support the development, writing, and ultimate approval of the business plan. The following are key elements to the development of the business plan:

1. Customer Training and Technical Assistance:

- Customers may be expected to attend training and participate in technical assistance services related to self-employment. This could include options such as; training and technical assistance on subjects such as: exploring entrepreneurship, small business development, business plan development, small business management, accounting for business, and business financing.

- Customers may require business specific skill training to eliminate skill gaps or prepare for the operation of the business. This could include coursework such as accounting/bookkeeping, using computers in business, human resources in business, etc. Skill-building courses should be noted in the IPE as necessary.

2. Business Plan Development:

The Business Plan is viewed as an essential element in any business venture and will be the document used by IDVR to determine whether or not to participate in capitalizing the business venture.

- A basic Business Plan must be written and approved to the satisfaction for the VRC.

- The customer will prepare the Business Plan with or without external technical assistance from a service provider experienced in business plan development.

- Benefits counseling may be provided with a focus on the projected impact of revenues and expenses as noted in the Business Plan.

3. Process for Business Plan Review:

The customer's goal toward self-sufficiency and the level of the Agency's financial participation in the start-up capitalization of the business will determine the level of review and approval required.

- The counselor will review the plan for completeness according to the components listed in the definition of a Business Plan.

- All low cost/low risk/low complexity self-employment plans will be reviewed by the customer and the VRC.

  a. If the customer and IDVR agree, then the VRC and customer proceed to amend the IPE to initiate the self-employment plan.

  b. If the customer and IDVR agree, that revisions are needed the customer proceeds to revise the plan with or without technical assistance.

  c. The customer may decide not to proceed with the identified business goal. If so, the customer and the VRC proceed with developing a new IPE goal (this may or may not be a different self-employment option).

V. Amending IPE - Implementing the Business Plan

Once the business plan has been approved by the customer and the VRC an IPE amendment will be developed that identifies necessary services and activities to implement the business plan.

1. Update comprehensive assessment based upon the additional information acquired through the business plan development process.

2. Identifying specific VR services, cost, and vendors need to implement the self-employment plan. It is important that the financial responsibility for each party is identified on the IPE.

3. Identifying necessary training and technical assistance needed to implement the plan.

4. Identifying post start-up support services that may be needed.

5. Identifying the benchmarks for successful closure. At minimum, one benchmark must identify acceptable wage level for the customer (not less than Federal minimum wage standards). Additional benchmarks should be identified that are critical to the success of self-employment and how to proceed if the benchmarks are not met. It is important that these benchmarks be clearly written, and the consequences for not meeting the benchmarks are clearly explained to the customer and stated on the IPE. Examples of consequences for not meeting the benchmark on the IPE:

    - Evaluating the appropriateness of the benchmarks and possibly modification of the benchmarks (this would require an amendment to the IPE).

    - Withdrawal of IDVR support of the business and reassess other VR options.

    - Proceeding with case closure.

VI. Closure of Self-Employment Case

1. Successful Closure

Successful closure can be completed when the following has been established:

- Identified benchmarks have been achieved.
- At least 90 days of stable employment and at least six (6) months of business operation.

Equipment provided for the self-employment plan may be released or returned, consistent with Section 13 of the policy.

2. Unsuccessful Closure

If adequate progress towards meeting the identified benchmarks is not made, the VRC proceeds with case closure unless the customer expresses interest in developing a new IPE goal. "All Other Reasons" would be the reason selected for case closure.

The customer is expected to return equipment provided for the self-employment plan, consistent with Section 13 of the policy.

b. Complex Business Plan

I. Role of IDVR

When working with customers expressing an interest in self-employment the primary role of IDVR is to:

- Provide relevant information regarding the availability of self-employment services supported by the Agency.

- Assist the customer in information gathering and assessment in deciding whether self-employment is an appropriate option to achieve their employment goal.

- Assess the customer's disability as it relates to the self-employment goal.

- Reduce or eliminate barriers to self-employment created by the disability.

- Authorize for the provision of external technical assistance including, but not limited to, business feasibility, training, business planning, and post start-up monitoring.

- Participate with the customer and external technical assistance to evaluate the feasibility of the business.

- Assist in identifying resources for the capitalization of the business plan.

- Coordinate training and technical assistance services.

- Provide technical assistance as deemed appropriate at post start-up of the business.

- Monitor business development at post start-up.

II. Role of the IDVR Customer

Customer responsibilities, as part of the informed choice process relating to self-employment, include but are not limited to:

- Determining the concept of the business.

- Participating in the assessment process.

- Exploring the feasibility of the business venture. This includes conducting research, gathering information, market feasibility, and likelihood of financial sustainability. This may include collaboration with technical assistance.

- Writing the business plan with or without technical assistance.

- Researching the availability of financial resources.

- Contributing, as appropriate, financially to the capitalization of the business venture by utilizing all available financial resources.

- Assisting in the identification of existing and potential barriers including those created by the disability, as well as identifying possible solutions.

- Developing skills and abilities necessary to operate and sustain the business venture.

- Business implementation and management.

- Providing regular financial or other relevant documentation or information requested by the Agency for post start-up monitoring.

- Fulfilling participation in the business start-up as noted in the Individualized Plan of Employment (IPE).

III. Assessment of IDVR Customer's Appropriateness for Self Employment

- Evaluation of the customer's interests, skills, aptitudes, and personality traits as they relate to self-employment. This may include; a) use of data gathering instruments, and b) formal vocational assessment to the degree necessary to ensure the customer has the basic skills necessary to operate and manage a small business.

- Ensure the viability of self-employment as it relates to the customer's ability to handle the physical, mental, emotional, and cognitive aspects of the business venture including their disability. This may require consultation with medical and/or psychological service providers that have been treating the customer. If clear information is not available additional assessments may be needed.

- The customer has attended a training session, such as the Small Business Development Center's "Exploring Entrepreneurship" or another comparable program, to evaluate the advantages and disadvantages of business ownership and explore self-employment preparedness from a personal perspective.

- Examination of the customer's financial goals related to self-employment should include consideration of issues such as, impact on Government benefits, supplementing family income versus primary source of support, and earning sufficient funds to maintain competitive employment standards. A referral for benefits planning may be appropriate.

- Conduct a preliminary assessment of various funding sources for business capitalization. The customer's expectations relative to the financial support she/he anticipates/expects from IDVR should be discussed at the onset. It is important that the customer understands that *IDVR will not be the sole source of startup capitalization and that any funding allocated to the start-up of the business will be consistent with IDVR policy related to financial participation.*

IV. Assessment of the Feasibility of the Business Concept

Customers may be referred to outside resources for assistance in examining the concept, market and financial feasibility of the business. If the business idea is deemed feasible, the information developed at this stage will provide some of the basic data that will be used in completing the Business Plan to be written later.

Testing the feasibility of the business idea should be formalized through a written Feasibility Assessment documenting the following:

- Concept Feasibility: Clear description of the business idea; customer's background related to the business concept including education, training, direct experience and transferable skill sets; a summary statement identifying issues of concern regarding the feasibility of the concept; and a recommendation as to whether the business concept is feasible.

- Market Feasibility: Geographic description of market area; description of competitors working in or marketing to potential customers in geographic area; definition of target markets including size and scope of each market; zoning issues/requirements for establishing a business at intended location.

- Financial Feasibility: Capitalization requirements (start-up funding not to exceed 6 months) consistent with the individual's business concept; identification of resources for start-up funding and ongoing capitalization. Twelve (12) months of projected sales/expenses may be included, when appropriate.

V. Writing an IPE – Developing a Business Plan

After a positive assessment of the feasibility of the business concept an initial IPE is written. Some of the key components of writing an IPE for business plan development include:

- IPE goal will be the anticipated vocational outcome that is the focus of the business plan.

- IPE must be identified as a self-employment IPE.

- Comprehensive assessment for this IPE is based on the appropriateness of self-employment as a strategy for the individual VR customer. It should be based on the feasibility analysis, the assessment of the customer's appropriateness for self-employment, and other information available.

Services provided as part of this IPE are intended to support the development, writing, and ultimate approval of the business plan. The following are key elements to the development of the business plan:

1. IDVR Customer Training and Technical Assistance:

- All customers will be expected to attend training, when available, and participate in technical assistance services related to self-employment. This could include options such as; training and technical assistance on subjects such as: exploring entrepreneurship, small business development, business plan development, small business management, accounting for business, and business financing. *Exceptions to the above requirement may be made with supervisory approval in limited circumstances.*

- Customers may require business specific skill training to eliminate skill gaps or prepare for the operation of the business. This could include coursework such as accounting/bookkeeping, using computers in business, human resources in business, etc. Skill-building courses should be noted in the IPE as necessary.

2. Business Plan Development:

The Business Plan is viewed as an essential element in any business venture and will be the document used by IDVR, banks, micro lenders, and other funding organizations to determine whether or not to participate in capitalizing the business venture.

- A comprehensive Business Plan will be required for all complex self-employment goals. The content for a comprehensive Business Plan is a thorough assessment of all the components listed in the Business Plan definition.

- The customer will prepare the Business Plan with or without external technical assistance from a service provider experienced in business plan development.

- Benefits counseling may be provided with a focus on the projected impact of revenues and expenses as noted in the Business Plan.

3. Explore and Apply for Resources Available From Other Sources:

IDVR customers pursuing self-employment are required to explore funding from sources other than IDVR. These may include microloans, commercial and consumer loans, loans from family, forgivable loans, equity grants, and work incentives for Social Security recipients including Plans to Achieve Self Support (PASS) and personal property (inventory and equipment) essential to the operation of the business. If the business plan is approved and the IPE is amended, the customer will apply for other resources necessary to implement the business plan.

4. Process for Business Plan Review:

The customer's goal toward self-sufficiency and the level of the agency's financial participation in the start-up capitalization of the business will determine the level of review and approval required.

- The counselor will review the plan for completeness according to the components listed in the definition of a Business Plan.

- The business plan is submitted for technical assistance and feasibility review by an outside consultant (approved by the VRC and customer) with experience in business development.

- All complex self-employment plans will be reviewed by a self-employment team. The self-employment team will include the customer, VRC, RM, at least one outside consultant, and other individuals as appropriate.

  a. If the customer and IDVR agree, based on the feedback from the self-employment team, then the VRC and customer proceed to amend the IPE to initiate the self-employment plan.

  b. If the customer and IDVR agree, based on the feedback from the self-employment team, that revisions are needed, the customer proceeds to revise the plan with or without technical assistance.

  c. If the customer does not agree with the recommendations from the self-employment team the customer may choose to follow the appeal process. (See Section 4.0)

  d. The customer may decide not to proceed with the identified business goal. If so, the customer and the VRC proceed with developing a new IPE goal (this may or may not be a different self-employment option).

VI. Amending IPE - Implementing the Business Plan

Once the business plan has been approved by the customer and the VRC an IPE amendment will be developed that identifies necessary services and activities to implement the business plan.

1. Update comprehensive assessment based upon the additional information acquired through the business plan development process.

2. Identifying specific VR services, resources, cost, and vendors need to implement the self-employment plan. It is important that the financial responsibility for each party is identified on the IPE.

3. Identifying necessary training and technical assistance needed to implement the plan.

4. Identifying post start-up support services that may be needed.

5. Identifying the benchmarks for successful closure. At minimum, one benchmark must identify acceptable wage level for the customer (not less than Federal minimum wage standards). Additional benchmarks should be identified that are critical to the success of self-employment and how to proceed if the benchmarks are not met. It is important that these benchmarks be clearly written, and the consequences for not meeting the benchmarks are clearly explained to the customer and stated on the IPE. Examples of consequences for not meeting the benchmark on the IPE:

   - Evaluating the appropriateness of the benchmarks and possibly modification of the benchmarks (this would require an amendment to the IPE).

   - Withdrawal of IDVR support of the business and reassess other VR options.

- Proceeding with case closure.

VII. Closure of Self-Employment Case

1. Successful Closure

Successful closure can be completed when the following has been established:

- Identified benchmarks have been achieved.
- At least 90 days of stable employment and at least six (6) months of business operation.

Equipment provided for the self-employment plan may be released or returned, consistent with Section 13 of the policy.

2. Unsuccessful Closure

If adequate progress towards meeting the identified benchmarks is not made, the VRC proceeds with case closure unless the customer expresses interest in developing a new IPE goal. "All Other Reasons" would be the reason selected for case closure.

The customer is expected to return equipment provided for the self-employment plan, consistent with Section 13 of the policy.

B. Supported Self Employment

a. Role of IDVR

When working with customers expressing an interest in supported self-employment the primary role of IDVR is to:

- Provide relevant information regarding the availability of supported self-employment services supported by the agency.
- Assist the customer in information gathering and assessment in deciding whether supported self-employment is an appropriate option to achieve their employment goal.
- Assess the customer's disability as it relates to the self-employment goal and the nature and level of support required (Examples: guardians/family members, targeted service coordinator, psychosocial rehabilitation provider, Medicaid broker, SSA payee).
- Reduce or eliminate barriers to supported self-employment created by the disability.
- May authorize for the provision of external technical assistance including, but not limited to, business feasibility, training, business planning, and post start-up

monitoring.

- Participate with the customer, support team, and external technical assistance to evaluate the feasibility of the business.
- Coordinate training and technical assistance services.
- Provide technical assistance as deemed appropriate at post start-up of the business.
- Monitor business development at post start-up.

b. Role of the IDVR Customer with their Support Team

Customer and support team's responsibilities, as part of the informed choice process relating to self-employment, include but are not limited to:

- Determining the concept of the business.
- Participating in the assessment process.
- Exploring the feasibility of the business venture. This may include gathering information, market feasibility, and likelihood of financial sustainability. This may include collaboration with technical assistance.
- Writing the business plan with or without technical assistance and approval by the VRC.
- Contributing, as appropriate, financially to the capitalization of the business venture by utilizing all available financial resources.
- Assisting in the identification of existing and potential barriers including those created by the disability, as well as identifying possible solutions.
- Identifying the areas within self-employment that need ongoing support and identify the specific individuals or resources that will provide that support.
- Developing skills and abilities necessary to operate and sustain the business venture.
- Business implementation and management.
- Providing regular financial or other relevant documentation or information requested by the Agency for post start-up monitoring.
- Fulfilling participation in the business start-up as noted in the Individualized Plan of Employment (IPE).

c. Assessment of Customer's Appropriateness for Supported Self Employment

A. Evaluation of the customer's interests, skills, aptitudes, and personality traits as they relate to supported self-employment. This may include; a) use of data gathering instruments, and b) formal vocational assessment to the degree necessary to ensure the customer has the basic skills necessary to operate and manage a small business with adequate support systems.

B. Ensure the viability of supported self-employment as it relates to the customer's ability to handle the physical, mental, emotional, and cognitive aspects of the business venture including their disability. This may require consultation with medical and/or psychological service providers that have been treating the customer. If clear information is not available additional assessments may be needed.

C. Examination of the customer's financial goals related to supported self-employment should include consideration of issues such as: impact on Government benefits, supplementing family income versus primary source of support, and earning sufficient funds to maintain competitive employment standards. A referral for benefits planning may be appropriate.

I. Writing an IPE – Developing a Business Plan

After a positive assessment of the feasibility of the business concept an initial IPE is written. Some of the key components of writing an IPE for business plan development include:

- IPE goal will be the anticipated vocational outcome that is the focus of the business plan.

- IPE must be identified as a supported self-employment IPE.

- Comprehensive assessment for this IPE is based on the appropriateness of supported self-employment as a strategy for the individual VR customer. It should be based on the feasibility analysis, the assessment of the customer's appropriateness for supported self-employment, and other information available.

Services provided as part of this IPE are intended to support the development, writing, and ultimate approval of the business plan. The following are key elements to the development of the business plan:

1. **IDVR Customer Training and Technical Assistance:**

   - Customers may be expected to attend training and participate in technical assistance services related to supported self-employment. This could include options such as; training and technical assistance on subjects such as exploring entrepreneurship, small business development, business plan development, small business management, accounting for business, and business financing.

   - Customers may require business specific skill training or support to eliminate gaps for the operation of the business.

2. Business Plan Development:

The Business Plan is viewed as an essential element in any business venture and will be the document used by IDVR to determine whether or not to participate in capitalizing the business venture. If the supported self-employment plan meets the criteria for a complex self-employment plan refer to the business plan development for complex self-employment plan. If the supported self-employment plan meets the criteria for low cost/low risk/low complexity plan refer to the business plan development for low cost/low risk/low complexity plan.

3. Process for Business Plan Review:

The customer's goal toward self-sufficiency and the level of the Agency's financial participation in the start-up capitalization of the business will determine the level of review and approval required.

If the supported self-employment plan meets the criteria for a complex self-employment plan refer to the business plan review for complex self-employment plan. If the supported self-employment plan meets the criteria for low cost/low risk/low complexity plan refer to the business plan review for low cost/low risk/low complexity plan.

II. Amending IPE - Implementing the Business Plan

Once the business plan has been approved by the customer, support team, and the VRC an IPE amendment will be developed that identifies necessary services and activities to implement the business plan.

1. Update comprehensive assessment based upon the additional information acquired through the business plan development process.

2. Identifying specific VR services, cost, and vendors need to implement the supported self-employment plan. It is important that the financial responsibility for each party is identified on the IPE.

3. Resources to provide long term support (Extended Employment Services, Medicaid waiver, private pay, or natural supports) are identified and secured.

4. Identifying necessary training and technical assistance needed to implement the plan.

5. Identifying post start-up support services that may be needed.

6. Identifying the benchmarks for successful closure. At minimum, one benchmark must identify acceptable wage level for the customer (not less than Federal minimum wage standards). Additional benchmarks should be identified that are critical to the success of supported self-employment and how to proceed if the benchmarks are not met. It is important that these benchmarks be clearly written, and the consequences

for not meeting the benchmarks are clearly explained to the customer and stated on the IPE. Examples of consequences for not meeting the benchmark on the IPE:

- Evaluating the appropriateness of the benchmarks and possibly modification of the benchmarks (this would require an amendment to the IPE).
- Withdrawal of IDVR support of the business and assess other VR options.
- Proceeding with case closure.

III. Closure of Supported Self-Employment Case

1. Successful Closure

Successful closure can be completed when the following has been established:

- Identified benchmarks have been achieved.
- At least 90 days of stable employment and at least six (6) months of business operation.
- Verification of necessary long term supports.

Equipment provided for the supported self-employment plan may be released or returned, consistent with Section 13 of the policy.

2. Unsuccessful Closure

If adequate progress towards meeting the identified benchmarks is not made, the VRC proceeds with case closure unless the customer expresses interest in developing a new IPE goal. "All Other Reasons" would be the reason selected for case closure.

The customer is expected to return equipment provided for the self-employment plan, consistent with Section 13 of the policy.

C. Continued Self-Employment:

I. Writing IPE

1. Prior to completing the IPE, a comprehensive assessment must be completed.
2. Identify specific VR services, cost, and vendors need to implement the self-employment plan. It is important that the financial responsibility for each party is identified on the IPE.
3. Identify necessary training and technical assistance needed to implement the plan.
4. Identify post start-up support services that may be needed.

5. Identify the benchmarks for successful closure. At minimum, one benchmark must identify acceptable wage level for the customer (not less than Federal minimum wage standards). Additional benchmarks should be identified that are critical to the success of self-employment and how to proceed if the benchmarks are not met. It is important that these benchmarks be clearly written, and the consequences for not meeting the benchmarks are clearly explained to the customer and stated on the IPE. Examples of consequences for not meeting the benchmark on the IPE:

   - Evaluating the appropriateness of the benchmarks and possibly modification of the benchmarks (this would require an amendment to the IPE).
   - Withdrawal of IDVR support of the business and assess other VR options.
   - Proceeding with case closure.

II. Closure of Continued Self-Employment Case

1. Successful Closure

Successful closure can be completed when the following has been established:

- Identified benchmarks have been achieved.
- At least 90 days of stable employment.

Equipment provided for the continued self-employment plan may be released or returned, consistent with Section 13 of the policy.

2. Unsuccessful Closure

If adequate progress towards meeting the identified benchmarks is not made, the VRC proceeds with case closure unless the customer expresses interest in developing a new IPE goal. “All Other Reasons” would be the reason selected for case closure.

The customer is expected to return equipment provided for the continued self-employment plan, consistent with Section 13 of the policy.

12.11 Effective Communication Services for Customers with Sensory Impairments

IDVR can provide interpreter services and note taking services for customers who are deaf, including tactile interpreting for customers who are deaf-blind; reader services, rehabilitation teaching services, note-taking services and orientation and mobility services for customers who are blind; telecommunications, sensory and other technological aids and devices.

NOTE~~ote~~: *If the customer is enrolled in an academic/technical training program at an institution that receives Federal financial support, the institution will be responsible for the provision of interpreter services within the classroom or formal training environment i.e., outside the classroom, but mandated or supported by the class curriculum. (A regional exception has been made at the Eastern Idaho Technical College – EITC as per the agreement between IDVR and EITC).*

12.12 Occupational Licenses, Tools, Equipment Initial Stocks and Supplies necessary in order to enter an Occupation

Occupational licenses, tools, equipment, initial stocks, and supplies may be purchased in order to adequately prepare the customer for a vocational outcome. *Private pilot's license will not be secured through the financial support of IDVR.*

IDVR will not purchase land or buildings for customers with disabilities. IDVR retains the right to reclaim occupational tools and equipment purchased by IDVR when:

- Customer's IPE is not completed.
- The tools and equipment are no longer necessary or appropriate for the existing or new employment goal.
- Case is closed other than rehabilitated.

12.13 Supported Employment Services

Supported employment services may be provided to customers with the most severe disabilities who require ongoing training on-the-job and support services.

12.13.1 Supported employment is defined as follows:

A. Competitive work (defined as payment of an hourly rate not less than minimum wage or less than the employer usually pays individuals who are not disabled) in an integrated work setting (defined as an environment in which the customer engages in as much contact with co-workers or the non-disabled general public as any other non-disabled person working in that job would experience) with ongoing support services for customers with the most severe disabilities for whom competitive employment:

    1. Has not traditionally occurred: or
    2. Has been interrupted or intermittent as a result of severe disability; and

3. Who, because of the nature and severity of their disability(ies), need intensive supported employment services or extended services in order to be gainfully employed; or

B. Transitional employment for customers with chronic mental illness.

NOTE~~ote~~: Non-competitive, non-integrated employment (sometimes referred to as Sheltered Work, Facility Based Work, Work Services, or Workshop Services) is not part of VR services. If a customer requests these services, IDVR will provide information about competitive, integrated employment to assist in informed choice. If the customer still request non-competitive, non-integrated employment they will be referred to the Extended Employment Services Program through the Extended Employment Services Referral Form.

12.13.2 Supported Employment Process:

A. Through an assessment (internally provided or through a review of external documentation) or through the provision of VR services, supported employment is identified as a necessary strategy for successful employment.

B. The VRC and customer will identify the level of ongoing job support necessary to maintain successful employment.

C. The VRC and customer will identify the availability of long term support strategies for the level of supported employment services identified.

D. If long term support strategies are available then an IPE may be written.

E. If long term support strategies are not available the case will be closed "Extended services not available."

12.13.3 Supported Employment Strategies

Natural Supports: Support from supervisors and co-workers occurring in the workplace to assist employees with disabilities to perform their jobs, including supports already provided by an employer for all employees. These natural supports may be both formal and/or informal, and include mentoring, supervision (ongoing feedback on job performance), training (learning a new job skill with a co-worker), and co-workers socializing with employees with disabilities at breaks or after work. Support provided by family, friends, or significant others are also included within this definition.

Extended Employment Services: (IDAPA 47.01.02) Funds Managed by IDVR/EES. There are four eligibility categories:

A. Developmental Disabilities (as defined in section 66-402, Idaho Code).

B. Mental Health: (Typically Schizophrenia, Major Mood Disorders, Borderline Personality Disorder, Delusional Disorder, Schizoaffective Disorder).

C. Specific Learning Disability.

D. Traumatic Brain Injury.

Medicaid Funded Employment Supports:

Developmental Disabilities – Adult DD Home and Community Based Services Medicaid Waiver (IDAPA 16.03.10.703.03). Eligibility for this waiver is determined by the Independent Assessment Providers (IAP) at the Idaho Center on Disability Evaluation. The Self-Directed option falls under this waiver.

Aged or Disabled Waiver – Supported Employment is a component included in this Home and Community Based Services Medicaid Waiver (IDAPA 16.03.10.326.17).

12.14 Post-Employment Services (PES)

A customer with a disability who had been previously rehabilitated may require additional services in order to maintain, advance in, or regain suitable employment. In order to qualify for this service strategy, the need must be based upon a disability previously documented in the eligibility determination section. Post-employment services require an amendment to the IPE. *In order to qualify for these services, the customer's vocational needs must be minor in scope ($1,000 or less) and duration (6 months or less). This means the customer only needs relatively short-term services with minimal cost associated.* Customers requiring multiple services over an extended period of time and/or a comprehensive/complex rehabilitation plan should be encouraged to reapply for the full-spectrum of VR services since their needs exceed the intent of post-employment services. PES can be initiated within three (3) years of successful closure. Once the record is destroyed, a new case must be opened.

NOTE~~ote~~: The intent of PES is to ensure that the employment outcome remains consistent with the customer's strengths, resources, priorities, concerns, abilities, capabilities, interests and informed choice.

12.15 Rehabilitation Technology

Rehabilitation technology services (rehabilitation engineering, assistive technology devices and services) may be provided as compensatory strategies to increase, maintain, or improve functional capabilities of customers with disabilities. Rehabilitation technology services may be provided at any time in the rehabilitation process, including the assessment for determining eligibility and vocational rehabilitation needs, ~~extended evaluation,~~ trial work, services provided under an IPE, and post-employment services. Rehabilitation technology, including telecommunications, sensory, and other technological aids and devices are exempt from a determination of the availability of comparable services or benefits exist under any other program. IDVR may request the use of comparable services and benefits. Personally prescribed devices, such as eye glasses, hearing aids, or wheelchairs are the exception, they not exempt from the consideration of comparable benefits. (For further information, please review the series of comprehensive fact sheets provided by Idaho Assistive Technology Project located on the IDVR intranet web site. There are also direct links to the Idaho Assistive Technology Project web site at that location).

12.15.1 "Assistive technology service" means any service that directly assists a customer with a disability in the selection, acquisition, or use of an assistive technology device, including:

A. The evaluation of the needs of a customer;
B. Purchasing, leasing, or otherwise providing for the acquisition by a customer with a disability of an assistive technology device;
C. Selecting, designing, fitting, customizing, adapting, applying, maintaining, repairing, or replacing assistive technology devices;
D. Coordinating and using other therapies, interventions, or services with assistive technology devices, such as those associated with existing education and rehabilitation plans and programs;
E. Training or technical assistance for a customer with a disability.

12.15.2 An assistive technology device means any item, piece of equipment, or product system, whether acquired commercially off-the-shelf, modified, or customized that is used to increase, maintain, or improve the functional capabilities of a customer with a disability.

12.15.3 Vehicle modification may be provided as an assistive technology device only when the applicant/customer is otherwise precluded from achieving a vocational objective.

1. In the event that a vehicle requires modification. e.g., hand controls, lift installation, or structural revision, may be provided on vehicles with an expected life of five (5) years or longer after modification, as evaluated by a certified mechanic (paid for by IDVR). The customer must agree to maintain insurance on the vehicle for replacement costs of the modified equipment.

2. Any vehicle modification over $3,000 must include a minimum of two bids from approved vendors.

3. Adaptive equipment items that are not documented as medically and/or vocationally necessary will be the responsibility of the customer.

4. When a customer purchases a new vehicle requiring modifications they should check with the dealership to see if the vehicle modification assistance is available. The VRC will check with the customer to see if the customer is willing to access and apply the rebate to the cost of vehicle modification.

12.15.4 Housing modifications may be provided as a supportive service so the customer can benefit from a core vocational rehabilitation service. Typically these services are provided under an IPE.

12.16 Supportive Services

A. <u>Maintenance</u> is a funding provision designed to offset *identified additional costs incurred as a result of participating in a rehabilitation service* (expenses incurred by the customer while engaged in assessments required for determining eligibility or while receiving services under an IPE).

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

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

Maintenance intended to cover shelter related expenses will not exceed four (4) months per case without the Chief of Field Service's approval.

Maintenance intended to cover food expenses will not exceed four (4) weeks per case without the Chief of Field Service's approval.

Maximum per diem food rates for the state of Idaho can be found at: http://www.sco.idaho.gov/.

Maximum per diem food rates for out of state can be found at: www.gsa.gov.

VRCs should be aware and make their customers aware, that any maintenance payments for food, shelter, or clothing may impact SSI benefits.

B. Transportation is a service for identified travel and related expenses for customers to participate in a vocational rehabilitation services or assessment.

1. Actual costs may be paid for taxi, buses, airplanes, etc.

2. When using a privately owned vehicle, fuel assistance will be negotiated. This depends upon actual transportation expenses for participation in rehabilitation services. Routine vehicle maintenance is not covered by IDVR.

3. The VRC must take into account the following issues when confronted with a request from a customer to repair a privately owned vehicle:

   a. The overall condition and value of vehicle.

   b. The extent of the repairs.
   c. The availability of other appropriate transportation.

   d. The necessity that the vehicle be used for IDVR participation or work.

12.17 School Transition

IDVR participates in student transition planning as outlined at 34 CFR 361.22 of the Rehabilitation Act ~~Regulation~~. The Regulations require plans, policies, and procedures that provide for the development and approval on an individualized plan for employment as early as possible during the transition planning process but, at the latest, by the time each student who is determined to be eligible for vocational rehabilitation services leaves the school setting. The Act also provides for:

1. Consultation and technical assistance to educational agencies in planning for transition of students with disabilities from school to post-school activities, including vocational rehabilitation;

2. Transition planning by personnel of IDVR and the educational agency for students with disabilities that facilitates the development and completion of their Individualized Education Programs (IEP~~E~~'s) under section 614 (d) of the Individuals with Disabilities Education Act (IDEA);

3. The roles and responsibilities including financial responsibilities, of each agency; and

4. Procedures for outreach to and identification of students with disabilities who are in need of transition services. Outreach to these students should occur as early as possible during the transition planning process and must include, at a minimum, a description of the purpose of the vocational rehabilitation programs, eligibility requirements; application procedures, and scope of services that may be provided to eligible customers.

    - Referrals should be made to the VRC as early as possible following the completion of the student's sophomore year. Earlier referrals can be made based on individual student need. All students with disabilities should be referred, not just those students in special education.

    - The VRC may participate and/or consult during the development of Individualized Educational~~al~~ Programs~~Plans~~ (IEPs), Individual Transition Plans (ITPs) and Child Study Teams (CSTs) at the invitation of the school and agreement between the VRC and CST members. VRC will determine the appropriate time to take an application when the focus is on the final vocational objective or formal planning for continued employment preparation after the student exits from high school.

    - The school district's responsibility is to provide a free and appropriate education to all students. This includes instructional aides, devices, and necessary services to achieve educational goals.

    - IDVR's responsibility is to facilitate the accomplishment of long-term vocational rehabilitation goals and intermediate rehabilitation objectives identified in the student's IPE. Only services that are required for achievement of the employment goal will be provided or coordinated.

12.18 Services to Family Members

The definition of "Family Member" is a relative or guardian of the customer or someone who lives in the same household as the customer and has a substantial interest in the well-being of the customer.

Conditions and Criteria:

A. Service may be provided only to individuals that meet the definition of family member.

B. The services to be provided are those which are deemed to be necessary to the successful completion of the customer's rehabilitation plan (IPE~~, Extended Evaluation, or~~ or Trial Work Period). The customer and VRC will make the determination as to whether a service to a family member is necessary to the vocational rehabilitation of the individual customer.

C. Comparable services and benefits are to be explored and if available, utilized prior to expenditure of agency funds.

D. IDVR funds can only be utilized if economic need is established on Financial Participation Assessment (FPA).

E. Family members may not have access to the customer's record of service without a release of information. Family members may have access to information pertaining to the services they received.

Procedures:

A. The category of Services to Family Members requires prior approval from the RM.

B. The IPE must set forth the services to be provided to the family member.

C. In developing the IPE the VRC must ensure that the customer and family member(s) understand the basis for the provision of services in order to avoid any misunderstanding as to the scope, nature, and duration of services.

D. Services under this section must comply with all other portions of the manual relating to the provision of IDVR services.

E. Services to family members must be terminated whenever one of the following conditions prevails:

   1. When a service(s) is no longer necessary to the customer's plan; or

2. When the customer's plan is terminated in accordance with case closure procedures; or

3. When Post-Employment Services are terminated.

F. When services are provided to family members, the record of service must include:

1. A rationale that services are required to support the customer's success in completing objectives of the IPE;

2. Data, including medical information, to support the decision to provide services (the least amount necessary to verify the need);

3. Identification of family member(s) receiving those services;

4. The cost of such services; and

5. Documentation of the time limited nature of these services.

12.19 Personal Care Assistant Services

A personal care assistant (PCA) assists a customer with a significant disability by performing personal activities of daily living requiring hands-on help, which cannot be performed by the customer because of the significance of the disability. PCA services including personal care related tasks such as:

1. Eating
2. Drinking
3. Toileting
4. Bathing
5. Transfers
6. Dressing
7. Grooming
8. Medications

PCA services do not include chore services, respite, cueing, or household tasks. In most cases, tasks performed by the PCA are customer directed. The PCA is not responsible for any tasks that the customer with a disability can perform independently.

PCA services have been developed to enhance the ability of a customer with a significant disability to live and work independently. The need for PCA services is normally identified through an independent living (IL) evaluation.

A PCA must have completed a State approved training program or have substantial knowledge and experience in providing PCA services.

It is the policy of the IDVR to provide PCA services to customers with significant disabilities, when PCA services over and above those required for normal daily living are required to assist the customer to complete the IDVR process. IDVR does not provide PCA services in lieu of existing PCA programs and providers. If the VRC determines that PCA services are necessary for the customer to complete the objectives of the IPE, the VRC will need to conduct or obtain a personal care assistant evaluation to determine the number of hours of PCA services that are required for participation in the IPE over and above the customer's normal daily living needs.

It is the responsibility of the customer and the VRC to identify, apply for and utilize any and all similar benefits for PCA services. PCA recruitment and management is the responsibility of the customer. Payment for PCA services is made through an authorization to the customer for PCA services. The customer then pays the chosen provider. IDVR will not exceed the current rate established by Medicaid. IDVR does not pay for standby time; only for direct service time related to the VR service that the PCA service is addressing. The customer is required to submit verification of services received from the provider to IDVR on a monthly basis to continue to receive PCA funded services.

IDVR PCA services are time limited in nature and are provided during the vocational rehabilitation process, if required, to assist in determining eligibility, for participation in vocational evaluation and assessment, and during implementation of an IPE with a goal leading to competitive employment. The provision of PCA services must be linked directly to the objective of the IPE. PCA services funded by IDVR must be for those tasks over and above PCA services normally required for tasks of daily living. No more than 40 hours per week will be authorized for PCA services.

When the IPE objectives have been successfully completed and the goal of competitive employment has been achieved, provision of PCA services required to maintain employment becomes the responsibility of the customer.

12.20 Services to a Group of Individuals

The Rehabilitation Act of 1973 as amended authorizes the provision of rehabilitation services to groups of individuals.

Guidelines~~:~~

Services for a group of individuals with disabilities must be expected to substantially contribute to the vocational rehabilitation of a group of individuals, but does not relate directly to the individualized rehabilitation program of any one individual with disability. The decision to provide services to groups will be made based on the need for the services as well as the available resources of the agency.

Establishment

Under the authority of 34 CFR 361.49(a)(1), IDVR may pursue the establishment, development, or improvement of a public or non-profit community rehabilitation program that is used to provide vocational rehabilitation services that promote integration and competitive employment, including, under special circumstances, the construction of a facility for a public or non-profit community rehabilitation program. Examples of "special circumstances" include the destruction or natural disaster of the only available center serving an area or a State determination that construction is necessary in a rural area because no other public agencies or private non-profit organizations are currently able to provide vocational rehabilitation services to individuals.

Any CRP establishment activities undertaken by IDVR will be supported by the pre-planning requirements under 34 CFR 361.49(b)(1) & (2) and 34 CFR 361.29.

In order for IDVR to engage in activities to establish, develop or improve a public or non-profit CRP, pursuant to 34 CFR 361.49(a)(1), and use of non-Federal expenditures incurred by those activities to satisfy match requirement under the VR Program, IDVR must first satisfy several pre-planning requirements:

1. IDVR must have written policies that set forth the nature and scope of services that will be provided to groups of customers with disabilities, and the criteria that will be used to determine the provision of those services (34 CFR 361.49(b)(1)); and

2. Establishment activities must have been identified as a need in IDVR's most recent statewide comprehensive needs assessment and IDVR must have included in its State plan a discussion of the strategies it would use to meet that need (34 CFR 361.29).

If IDVR has satisfied the above pre-planning requirements for activities related to establishing, developing, or improving a CRP, then the following requirements must be satisfied in order for IDVR to use non-Federal expenditures incurred for these activities towards its match requirements under the VR program pursuant to 34 CFR 361.60(b)(3)(i):

1. The activities proposed must fit within the definition of establishment, development, or improvement of a CRP at 34 CFR 361.5(b)(17);

2. The establishment, development, or improvement of a facility for a CRP at 34 CFR 361.5(b)(18), or

3. The construction of facility for a CRP at 34 CFR 361.5(b)(12); and

4. The activities must be designed to provide services to IDVR customers and applicants.

Based on 34 CFR 361.5(b)(17), IDVR may:

1. The establishment of a facility for a public or non-profit community rehabilitation program.

2. Staffing, if necessary to establish, develop, or improve a community rehabilitation program for the purpose of providing vocational rehabilitation services to applicants or eligible customers.

3. Other expenditures related to the establishment, development, or improvement of a community rehabilitation program that are necessary to make the program functional or

increase its effectiveness in providing vocational rehabilitation services to applicants or eligible customers, but are not ongoing operating expenditures of the program.

Employment Related Services to Customers with Disabilities

Under the authority of 34 CFR 361.49(a)(6), IDVR may pursue services that promise to contribute substantially to the rehabilitation of a group of customers but that are not related directly to the individualized plan for employment of any one customer.

The nature and scope of the services provided include:

1. Increase access to employment and educational opportunities for persons who are deaf or hard of hearing.
2. Increase awareness of the needs of persons who are deaf and hard of hearing through educational informational programs.
3. Encourage consultation and cooperation among departments, agencies, and institutions serving the deaf and hard of hearing.

SECTION 13.0 - CLOSURE

13.1 Closure During Application Status

A. No disabling condition

The VRC is unable to verify the existence of a disabling condition. The decision requires IDVR staff to:

1. Provide an opportunity for the customer or his/her representative to receive full consultation regarding the closure decision.
2. Provide written notification, or other appropriate mode of communication of:
    a. Ineligibility closure determination, explaining in clear and concise language the reason(s) for the ineligibility determination.
    b.Appeal rights (Rights and Responsibilities)
    c. Information regarding the Client Assistance Program (CAP)
3. Referral to other agency (ies), including Idaho Department of Labor.

B. No impediment to employment

The VRC cannot establish that there is a substantial barrier to employment based on disability. The decision requires IDVR staff to:

1. Provide an opportunity for the customer or his/her representative to receive full consultation regarding the closure decision.

2. Provide written notification, or other appropriate mode of communication of:

    a. Ineligibility closure determination, explaining in clear and concise language the reason(s) for the ineligibility determination.
    b. Appeal rights (Rights and Responsibilities)
    c. Information regarding the Client Assistance Program (CAP)

3. Referral to other agency (ies), including Idaho Department of Labor.

C. Does not require VR services to achieve an employment outcome

The VRC has been unable to identify substantial VR services necessary to secure, retain or regain employment. The decision requires IDVR staff to:

1. Provide an opportunity for the customer or his/her representative to receive full consultation regarding the closure decision.

2. Provide written notification, or other appropriate mode of communication of:

    a. Ineligibility closure determination, explaining in clear and concise language the reason(s) for the ineligibility determination.
    b. Appeal rights (Rights and Responsibilities).
    c. Information regarding the Client Assistance Program (CAP).

3. Referral to other agency (ies), including Idaho Department of Labor.

D. Unable to benefit from VR services

The VRC, through trial work ~~or extended evaluation~~ has established that the applicant is unable to benefit in terms of an employment outcome. The decision requires IDVR staff to:

1. Provide an opportunity for the customer or his/her representative to receive full consultation regarding the closure decision.

2. Provide written notification, or other appropriate mode of communication of:

    a. Ineligibility closure determination, explaining in clear and concise language the reason(s) for the ineligibility determination.
    b. Appeal rights (Rights and Responsibilities).
    c. Information regarding the Client Assistance Program (CAP).

3. Referral to other agencies as appropriate.

4. Conduct a review of the ineligibility determination following the closure of the record within 12 months and annually thereafter, up to two (2) years, or longer if requested. The customer with a disability, or, if appropriate, the customer's

representative, may have input into the review and re-evaluation. Signed documentation should be included of the review and re-evaluation if the review and re-evaluation is able to be completed.

E. Extended services unavailable

The VRC has determined that extended services are required and the VRC and customer have determined that the extended services are not available at this time. The decision requires IDVR staff to:

1. Provide opportunity for the customer or his/her representative to receive full consultation regarding the closure decision.

2. Provide written notification, or other appropriate mode of communication of:

    a. Closure determination, explaining in clear and concise language the reason(s) for the determination.
    b. Appeal rights (Rights and Responsibilities).
    c. Information regarding the Client Assistance Program (CAP).

3. Referral to other agencies as appropriate.

F. No longer interested in receiving services, unable to locate/contact or moved, death, institutionalized or incarcerated, transportation not feasible or available, transferred to another agency, and all other reasons.

These are closures without eligibility determination. The decision requires IDVR staff to:

1. Provide an opportunity for the customer or his/her representative to receive full consultation regarding the closure decision.

2. Provide written notification, or other appropriate mode of communication of (when death is a reason for case closure do not send any written documentation):

    a. Closure determination.
    b. Appeal rights (Rights and Responsibilities).
    c. Information regarding the Client Assistance Program (CAP).

13.2 Closure During Eligibility Status

A. Unable to benefit from VR services, disability too severe for services

The VRC, through clear and convincing evidence has established that the customer is unable to benefit in terms of an employment outcome. An ineligibility determination, based on inability to benefit from VR services or disability too severe for services, may be completed after an initial eligibility determination. The decision requires IDVR -staff to:

1. Provide an opportunity for the customer or his/her representative to receive full consultation regarding the closure decision.

2. Provide written notification, or other appropriate mode of communication of:

   a. Ineligibility closure determination, explaining in clear and concise language the reason(s) for the ineligibility determination.
   b. Appeal rights (Rights and Responsibilities).
   c. Information regarding the Client Assistance Program (CAP).

3. Referral to other agencies or the Extended Employment Program, as appropriate.

4. Conduct a review of the ineligibility determination following the closure of the record within 12 months and annually thereafter, up to two (2) years, or longer if requested. The customer with a disability, or, if appropriate, the customer's representative, may have input into the review and re-evaluation. Signed documentation should be included of the review and re-evaluation if the review and re-evaluation is able to be completed.

B. Extended services unavailable

The VRC has determined that extended services are required and the VRC and customer have determined that the extended services are not available at this time. The decision requires IDVR staff to:

1. Provide an opportunity for the customer or his/her representative to receive full consultation regarding the closure decision.

2. Provide written notification, or other appropriate mode of communication of:

   a. Closure determination, explaining in clear and concise language the reason(s) for the determination.
   b. Appeal rights (Rights and Responsibilities).
   c. Information regarding the Client Assistance Program (CAP).

3. Referral to other agenc~~y~~ies, as appropriate.

C. No longer interested in receiving services, unable to locate/contact or moved, death, institutionalized or incarcerated, transportation not feasible or available, transferred to another agency, and all other reasons.

The decision requires IDVR staff to:

1. Provide an opportunity for the customer or his/her representative to receive full consultation regarding the closure decision.

2. Provide written notification, or other appropriate mode of communication of (when death is a reason for case closure do not send any written documentation):

   a. Closure determination.
   b. Appeal rights (Rights and Responsibilities)
   c. Information regarding the Client Assistance Program (CAP)

D. **Closure from the Order of Selection Wait L~~l~~ist**

When the VRC is unable to contact (the VRC uses the closure reason – unable to locate/contact or moved) or the customer has declined VR participation (the VRC uses the closure reason – **No longer interested in receiving services**).

The decision requires IDVR staff to:

1. Provide an opportunity for the customer or his/her representative to receive full consultation regarding the closure decision.

2. Provide written notification, or other appropriate mode of communication of (when death is a reason for case closure do not send any written documentation):

   a. Closure determination.
   b. Appeal rights (Rights and Responsibilities).
   c. Information regarding the Client Assistance Program (CAP).

13.3 Unsuccessful Closure After Implementation of IPE

A. Unable to benefit from VR services, disability too severe for services

The VRC, through clear and convincing evidence has established that the customer is unable to benefit in terms of an employment outcome. A closure determination, based on inability to benefit from VR services or disability too severe for services, may be completed after an initial eligibility determination. The decision requires IDVR staff to:

1. Provide an opportunity for the customer or his/her representative to receive full consultation regarding the closure decision.

2. Provide written notification, or other appropriate mode of communication of:

a. Closure determination, explaining in clear and concise language the reason(s) for the determination.
b. Appeal rights (Rights and Responsibilities).
c. Information regarding the Client Assistance Program (CAP)

3. Referral to other agencies or the Extended Employment Program, as appropriate.

4. Customer must return tools and equipment to the agency at the time of unsuccessful closure, in accordance to the tool agreement. Exceptions must be approved by the RM.

B. Extended services unavailable

The VRC has determined that extended services are required and the VRC and customer have determined that the extended services are not available at this time. The decision requires IDVR staff to:

1. Provide an opportunity for the customer or his/her representative to receive full consultation regarding the closure decision.

2. Provide written notification, or other appropriate mode of communication of:

   a. Closure determination, explaining in clear and concise language the reason(s) for the determination.
   b. Appeal rights (Rights and Responsibilities)
   c. Information regarding the Client Assistance Program (CAP)

C. No longer interested in receiving services, unable to locate/contact or moved, death, institutionalized or incarcerated, transportation not feasible or available, transferred to another agency, and all other reasons.

The decision requires IDVR staff to:

1. Provide an opportunity for the customer or his/her representative to receive full consultation regarding the closure decision.

2. Provide written notification, or other appropriate mode of communication of (when death is a reason for case closure do not send any written documentation);

   a. Closure determination.
   b. Appeal rights (Rights and Responsibilities)
   c. Information regarding the Client Assistance Program (CAP)

13.4 Successful Competitive Closure After Implementation of IPE

A. Rehabilitated with supports

Customers in supported employment are determined rehabilitated when the objectives of the IPE for supported employment training are achieved and a plan for extended support services is verified through the activation of services related to the long-term source of support.

In order to determine that a customer has achieved an employment outcome, the case record must document:

1. That services provided under the IPE contributed to the achievement of the employment outcome.

2. That the employment outcome is consistent with the customer's strengths, resources, priorities, concerns, abilities, capabilities, interests, and informed choice.

3. That the employment is in the most integrated setting possible, consistent with the customer's informed choice, that the customer is compensated at or above the minimum wage and his/her wages and benefits are not less than that customarily paid by the employer for same or similar work performed by non-disabled individual.
4. That the employment outcome has been maintained for a minimum of 90 days.

5. The customer and the VRC consider the employment outcome to be satisfactory and agree that the customer is performing well on the job. Whenever possible, confirm that the employer is satisfied with the work performance of the customer as well as IDVR services.

6. That an assessment occurred regarding whether a need exists for Post-Employment services and that the customer was informed regarding the purpose and availability of post-employment services, should the need arise.

7. Ownership of tools and equipment may be transferred to the customer at the time of closure if the tools and equipment are necessary for on-going employment purposes.

Case closure requires IDVR staff to:

1. Provide an opportunity for the customer or his/her representative to receive full consultation regarding the closure decision.

2. Provide written notification or other appropriate mode of communication.

B. Rehabilitated without supports

In order to determine that a customer has achieved an employment outcome, the case record must document:

1. That services provided under the IPE contributed to the achievement of the employment outcome.

2. That the employment outcome is consistent with the customer's strengths, resources, priorities, concerns, abilities, capabilities, interests, and informed choice.

3. That the employment is in the most integrated setting possible, consistent with the customer's informed choice, that the customer is compensated at or above the minimum wage and his/her wages and benefits are not less than that customarily paid by the employer for same or similar work performed by non-disabled individual.

4. That the employment outcome has been maintained for a minimum of 90 days.

5. The customer and the VRC consider the employment outcome to be satisfactory and agree that the customer is performing well on the job. Whenever possible, confirm that the employer is satisfied with the work performance of the customer as well as IDVR services.

6. That an assessment occurred regarding whether a need exists for Post-Employment Services and that the customer was informed regarding the purpose and availability of post-employment services, should the need arise.

7. Ownership of tools and equipment may be transferred to the customer at the time of closure if the tools and equipment are necessary for on-going employment purposes.

Case closure requires IDVR staff to:

1. Provide an opportunity for the customer or his/her representative to receive full consultation regarding the closure decision.

2. Provide written notification or other appropriate mode of communication.

13.5 Closure After Post Employment Services (PES)

A. Closed unemployed; opening a new VR case

The VRC has made a determination that the scope of services is inappropriate for PES and the customer has agreed to apply for a new VR case.

1. PES is closed.
2. Customer applies for services.

B. Employment maintained or regained

The customer and VRC are in agreement the job is or has been maintained, regained or advanced in.

1. PES case is closed
2. Customer agreement with case closure is documented in the case record.

C. Lost job; no further services at this time

The customer's employment was not maintained, regained, or advanced in and no VR services are appropriate at this time.

1. PES case is closed
2. Customer has been informed of case closure is documented in the case record.

SECTION 14.0 ORDER OF SELECTION

14.1 Authority

Rehabilitation Act of 1973, as amended. ~~by the Rehabilitation Act of 1998, Sections 101 and 102.~~ 34 CFR ~~Part 361~~ §361.36~~, §361.3~~.

~~*14.2 Policy*~~

In the event that the projected fiscal and personnel resources of IDVR become inadequate to provide the full range of VR services, as appropriate, to all eligible customers, the Administrator will implement the Division's Order of Selection (OOS). ~~procedure. By law,~~ Federal regulations require the Division ensure ~~this procedure must insure~~ that customers with the most significant disabilities are served first. The criteria used for determining the OOS~~Order of Selection for services~~ is the severity~~category~~ of ~~significance of the~~ disability ~~as~~priority category defined in the Field Services Policy Manual Section 6.2.~~ and the application date for IDVR services.~~

14.2 Factors Prohibited in Order of Selection Consideration

Factors that will not be ~~considered in determining~~ used as criteria for establishing an ~~an~~ O~~o~~rder of S~~s~~election priority~~ category~~ include:

A. Type of d~~D~~isability;
B. Duration of residency, provided the customer is present in the state;
C. Age, gender, race, color or national origin;
D. Source of referral or cooperative agreements with other agencies;
E. Type of expected employment outcome;
F. The need for specific services or anticipated cost of such services; or
G. The income level of the customer or customer's family.

14.3 Administrative Requirements

Under Order of Selection the Division must:

- Continue to accept applications and make determinations of eligibility. This includes the continued provision of diagnostic services necessary to determine eligibility and the individual's priority under the Order of Selection.
- Continue to provide pre-employment transition services to students with disabilities who were receiving such services prior to determination of eligibility and assignment to a priority category.
- Continue to provide services to all individuals under an IPE who has begun to receive services prior to the effective date of the Order of Selection, regardless of the severity of the individual's disability.
- Implement the Order of Selection on a statewide basis.
- Notify all eligible individuals of the priority categories and their assignment to a particular category.
- Notify eligible individuals of their right to appeal their category assignment.
- Ensure all funding arrangements, including third-party cooperative arrangements and awards under the establishment authority, are consistent with the Order of Selection or renegotiate the funding arrangements to be consistent with the Order of Selection.
- Provide adequate referral assistance (including the documentation of a point of contact for the referral agency) to individuals with disabilities who are:
    1. not eligible for services or
    ~~1.~~ 2. are eligible, but are currently on a wait list.~~IDVR must ensure that it is funding arrangements for providing services under the State Plan, including third-party arrangements and awards, such as cooperative funding agreements with school districts, other State agencies or contractual arrangements, are consistent with the Order of Selection. If any funding arrangements are inconsistent, the Agency must renegotiate these funding arrangements so that they are consistent with the Order of Selection.~~

14.4 Procedures

Determination of Severity of~~ignificant~~ Disability

When a VRC ~~determines a customer is eligible, the VRC also~~makes an eligibility determination, they also ~~establishes~~determine the ~~level of significance~~ severity of disability based upon the criteria established in the Field Services Policy Manual Section 6.0. The ~~level of significance~~ severity of the customer's disability is ~~identified~~ categorized into one~~with one~~ of the following three priority categories:

Priority 1 – Eligible individuals with the Most Significant disabilities (MSD).

Priority 2 – Eligible individuals with Significant Disabilities (SD).

Priority 3 – All other eligible individuals with Disabilities (D).

Individuals will be released from the statewide wait list based first on priority category and second by earliest date of application. Prior to any change to priority categories being served, the field and impacted customers, will be notified of the change and the effective date.

Reassessment of Severity of Disability

A request for priority category reclassification is allowable in cases where it would be necessary and appropriate for IDVR to authorize a reassessment of the significance of a disability when existing records and/or other evidence do not accurately describe the individual's current level of functioning. Regional Manager approval is required prior to a reevaluation of severity of disability. A Customer will make a request for reclassification of severity of disability by submitting a written request to the Regional Manager within 21 calendar days of notification of their priority category.~~Customers with disabilities~~

~~A. Customers with significant disabilities~~
~~B. Customers with the most significant disabilities~~

Maintenance of Statewide Order of Selection Wait~~ing~~ List
After priority category assignment, an individual will be served or placed on a wait list if their category is restricted.~~When a VRC completes the eligibility process and the determination of the significance of the disability determination, the customer is added to the statewide Order of Selection waiting list in the appropriate category by date of application. The date of application process is completed (see section 5.3). The case is transferred from the VRC caseload to the office Order of Selection waiting list.~~

Written notification will be provided to the customer informing them of:

- Their eligibility determination.
- ~~Their placement on the waiting list.~~
- The priority categories of IDVR's Order of Selection.
- Their assignment to a particular category.
- Their placement on the wait list (if applicable).
- Their right to appeal their category assignment.
- Their requirement to respond to agency contact within 30 days to avoid case closure and removal from the wait list.
- The availability of the Client Assistance Program (CAP).

Individuals ~~When resources are available, the Chief of Field Services notifies the RMs of the number of customers to take from the waiting list by priority category, application date(s) and office locations. RMs coordinate with the VRCs to transfer the corresponding cases from the Order of Selection waiting list in respective offices to VRC's caseloads.~~

~~A customer~~ on the ~~statewide Order of Selection waiting list may request that his/her case be transferred from one office to another by contacting the local IDVR office. The request for transfer will be processed by the RM where the case resides~~OOS wait list will be contacted at least once in the first 90 days ~~.~~

~~**Transferring a New Case to the Order of Selection Waiting List**~~

~~The RM is responsible for ensuring appropriate priority categories are being served, for maintaining the office Order of Selection waiting list and for verifying Information and Referral (I&R) is occurring. Cases will be transferred from a VRC's caseload to the office Order of Selection waiting list within ten (10) business days of the~~ after an eligibility determination is made. Subsequent contact shall be made at least every 180 days while the customer is~~date.~~

~~The RM will verify Information and Referral sources have been documented prior to transferring the case to the office Order of Selection waitlist.~~

~~**Transferring a Case from the Order of Selection Waiting List to a VRC**~~

~~Upon notification to initiate services for case~~ on the ~~Order of Selection waiting list for the specified priority category and application dates, the RM or designee must transfer cases from the Order of Selection office waiting list to a VRC within five (5) business days. The VRC is notified of the case transferred and is authorized to initiate services~~wait list.

The Division will conduct periodic projections of fiscal resources and its ability to serve customers in all priority categories.~~If a case is closed from the office Order of Selection waiting list, the case is automatically removed from the statewide Order of Selection list.~~

Initiating Services for Customers ~~Referred from the Order of Selection~~ on the Wait~~ing~~ List

Based upon current and projected fiscal resources, IDVR will determine when it is appropriate to ~~implement procedures to re-establish or maintain contact with customers while they are on the Order~~open a priority category and begin serving eligible individuals on OOS ~~of Selection~~ wait~~ing~~ list and notify field staff of ~~. Factors to consider are the length of time a customer has been on the list and the anticipated time before the customer's category will open~~this change.

Upon receipt of the case ~~transferred~~ from the Order of Selection wait ~~ling l~~ist, ~~the ID~~VR staff will initiate~~takes~~ the following steps:

1. Engage ~~To contact~~ the customer to determine if services are still needed and schedule an appointment.
2. ~~If telephone contacts are unsuccessful a letter will be sent to initiate contact.~~If initial contact attempts (e.g., phone or e-mail) are unsuccessful, a letter will be sent to notify the customer of their change in status and their need to contact IDVR to verify their continued interest in VR services.

3. ~~Reas~~Make reasonable ~~and timely~~ efforts to ~~find~~locate updated phone numbers and/or addresses for the customer.
4. If the customer has not responded within 30~~forty (40)~~ days from the date the letter was sent, IDVR staff will proceed with case closure.

VR staff~~Cs~~ need to consider the communication needs of the customer, including the need for information in alternate formats when initiating contact by telephone or letter.

Steps to contact each customer will be ~~are~~ documented in ~~the~~ case notes ~~management system narrative~~ and filed in the case service record.

~~Exceptions for Reopening Closed Cases~~

~~A VRC may request the RM to obtain permission from the Chief of Field Services to reopen a case on an exception to policy basis if a customer contacts IDVR after his/her case is closed. If the customer's lack of response was a result of exceptional circumstances that prevented the customer from responding, the VRC should consult with his/her supervisor about an exception to policy to reopen the case.~~

~~Customers Not Ready to Proceed with IPE Development upon Referral from the Order of Selection Waiting List~~

~~If a VRC contacts a customer to initiate services and she/he is not ready to begin working with IDVR, the VRC needs to help the customer make an informed decision about how to proceed. If a customer does not wish to, or is unable to proceed with IPE development, IDVR will close the case and the customer must reapply. IDVR cannot 'hold' a spot on the waiting list nor can a customer be put back at the top of the list. The VRC needs to discuss the reasons the customer is not ready to proceed and whether a reasonable time frame can be agreed upon to resolve the issues.~~

14.5 Information and Referral (I&R)

When operating under Order of Selection, IDVR is required to offer Information and Referral (I&R) services to customers who cannot be served and must wait for services because of the Order of Selection.

IDVR must document and retain information about referrals to other Federal and State programs that provide employment-related services.

Information and Referral Requirements

Federal regulations establish minimum requirements under I&R as follows. IDVR must:

A. Provide customers with accurate vocational rehabilitation information and guidance (which may include counseling and referral for job placement) to prepare for, get, or keep a job.
B. Refer customers with disabilities to other Federal or State programs that are best suited to address their specific employment needs, including partners in the w~~W~~orkforce development s~~investment s~~ystem.
~~C. Initiate a notice of referral identifying:~~
    ~~a. The name of the program to which the customer is referred;~~

~~**b. A contact person in that program; and**~~
~~**c. Information about the most suitable services to assist the customer prepare for, get or keep a job.**~~

~~**14.6 Counseling and Guidance**~~

~~**To provide customers with accurate VR information and guidance, which may include counseling and referral for job placement, an IDVR counseling staff member talks to the customer about his/her need to prepare for, get or keep a job. The IDVR counseling staff member provides advice and guidance about how the customer might proceed, explains referral sources available, and offers to initiate a referral to another program, if appropriate. These interactions occur in the course of other activities, such as completing the application, intake, and eligibility determination.**~~

~~**For customers who choose not to apply for IDVR services because of the Order of Selection, a general guideline is to limit I&R services to one appointment. The VRC will NOT establish an on-going counseling relationship nor perform follow-up services regarding I&R.**~~

~~**Counseling and Guidance – Referrals**~~

~~**Each office will maintain a list of Federal and State programs with which IDVR has established a formal referral relationship. It is expected that the Idaho Department of Labor One-Stop Centers will be used extensively, but not exclusively, for the referral of customers who either choose not to apply or are on a waiting list to receive IDVR services. Other programs to be used in this capacity, as appropriate, include Tribal VR programs and other community programs. Because of limited resources in some areas and the unique needs of some customers with disabilities, there may not be an appropriate program available to every person.**~~

~~**Counseling and Guidance – Job Placement**~~

~~**IDVR counseling staff may provide brief counseling for job placement. If the customer intends to engage in independent, self-directed job search or related activities, the IDVR counseling staff member may provide brief counseling to assist the customer in this effort. Examples of counseling and referral for job placement may include, but are not limited to:**~~

~~**A. A counseling session with the customer to discuss what efforts to find a job the customer has already tried and offering other job search strategies and suggestions.**~~
~~**B. Reviewing and giving advice on a customer's resume.**~~
~~**C. Discussing reasonable accommodation issues and strategies for approaching an employer.**~~
~~**D. Discussing and providing the customer with access to the Internet or another resource.**~~
~~**E. Sharing information about the local labor market.**~~

~~14.7~~ Documenting a Formal Referral

~~All referrals to employment-related programs must be documented, including referrals for customers who have applied and are waiting for services. Each RM, or designee, will identify and maintain the list of regional referral sources that require a formal referral. Each time a~~

~~customer is referred to one of the listed organizations, the IDVR staff member documents the referral in the case management system. Every case will have an entry in the case management system prior to transferring the case to the Order of Selection waiting list, or the case service record will document efforts to locate referral sources and the reason(s) a referral was not provided.~~

If a customer requests a referral, the IDVR staff member prepares and sends a written referral to the organization best suited to meet the specific employment needs of the customer. The VR counselor is required to document this referral in casenotes. In addition, the ~~ID~~VRC ~~counseling staff member~~ provides the customer ~~being referred~~ with the following:

A. A copy of the written referral notifying the other F~~f~~ederal or S~~s~~tate program about the referral.
B. The name of the person in that organization to be contacted by the customer being referred.
C. Information about the most suitable services to prepare for, secure, retain, or regain employment.

Informal Referrals

VRCs routinely provide information to applicants and eligible customers about ~~a wide array of~~ community assistance programs that may offer services or benefits to assist the customer ~~meet a variety of needs (food or clothing banks, medical programs, counseling services, etc.). These types of referrals are considered informal referrals. IDVR staff are encouraged to continue providing customers with information about other programs that offer services to assist them~~ in meeting a variety of needs. Formal documentation requirements that apply to workforce development system partners do not apply to informal referrals.

14.6~~8~~ Post Employment Services

Order of Selection does not impact or alter the provision of post-employment services. Post-employment services are considered an amendment of the IPE, and therefore, a customer who needs post-employment services is not required to meet the highest priority category currently being served~~iced~~ under an Order of Selection nor is the customer~~s~~ required to wait for services.

If substantial services are needed, PES is not appropriate. A new application should be taken and would be subject~~ed~~ to Order of Selection.

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SUBJECT

Proposed Rule IDAPA 47.01.02, Rules and Minimum Standards Governing Extended Employment Services.

REFERENCE

August 2006	Board approved the Temporary and Proposed Rules and Minimum Standards Governing Extended Employment Services.
November 2006	Board approved pending rule amendments to IDAPA 47.01.02.

APPLICABLE STATUTE, RULE, OR POLICY

Sections 33-2211 and 33-2303, Idaho Code

BACKGROUND/DISCUSSION

The Idaho Division of Vocational Rehabilitation (IDVR) is an agency of the Idaho State Board of Education. In July of 2004 Governor Kempthorne transferred the administration of the long term vocational support services in Idaho from the Department of Health and Welfare to Idaho Division of Vocational Rehabilitation. Legal authority to promulgate rules for the Extended Employment Services were established under House Bill 547 (2006). Rules promulgated at that time created IDAPA 47.01.02 establishing provider qualifications, defining eligible clients, and the services to be provided. There have been no updates to this section of Administrative Code since 2006.

IMPACT

IDVR does not anticipate any fiscal impact from the approval of these rules. The rules will provide guidance for community rehabilitation programs in the delivery of Extended Employment Services, information that will assist others in making appropriate referrals, and the authority for IDVR to intervene should providers fail to meet the standards set forth in the rules.

ATTACHMENTS

Attachment 1 – Proposed Rule changes to IDAPA 47.01.02 Page 3

STAFF COMMENTS AND RECOMMENDATIONS

Proposed rules have a 21 day comment period prior to becoming pending rules. Based on received comments and Board direction, changes may be made to proposed rules prior to entering the pending stage. All pending rules will be brought back to the board for approval prior to submittal to the Department of Administration for publication in the Idaho Administrative Rules Bulletin as a pending rule. Pending rules become effective at the end of the legislative session in which they are submitted.

Staff recommends approval.

BOARD ACTION

I move to approve changes to proposed rule IDAPA 47.01.02, Rules and Minimum Standards Governing Extended Employment Services, as submitted in Attachment 1.

Moved by __________ Seconded by __________ Carried Yes _____ No _____

**IDAPA 47
TITLE 01
CHAPTER 02**

47.01.02 - RULES AND MINIMUM STANDARDS GOVERNING EXTENDED EMPLOYMENT SERVICES

000. LEGAL AUTHORITY.
The following rules and minimum standards for E~~e~~xtended E~~e~~mployment S~~s~~ervices are made under sections 33-2211 and 33-2303, Idaho Code. (3-14-07)

001. TITLE AND SCOPE.

01. Title. These rules govern the Extended Employment Services (EES) p~~P~~rogram ~~–~~of the Idaho Division of Vocation Rehabilitation (IDVR) and are to be cited as IDAPA 47.01.02, Idaho Division of Vocational Rehabilitation, "Rules and Minimum Standards Governing Extended Employment Services." (3-14-07)

02. Scope. In accordance with section 33-2203, Idaho Code, the EES~~Extended Employment Services~~ p~~P~~rogram of IDVR provides to eligible customer~~Client~~s services that are intended to increase opportunities for such customer~~Client~~s to work in their communities. ~~IDVR~~ The EES program ~~–~~will contract with providers that have been approved~~certified by IDVR~~ to provide such services, as provided herein. (3-14-07)

002. WRITTEN INTERPRETATIONS.
There are no written interpretations of these rules. (3-14-07)

003. ADMINISTRATIVE APPEALS.
Hearings and appeals shall be governed according to the provisions of IDAPA 04.11.01, "Idaho Rules of Administrative Procedure of the Attorney General." (3-14-07)

004. INCORPORATION BY REFERENCE.
No documents are incorporated by reference. (3-14-07)

005. OFFICE INFORMATION.

01. Office Hours. The EES ~~IDVR administrative~~ office is open from 8:00 am until 5:00 pm Monday through Friday. (3-14-07)

02. Mailing Address. PO Box 83720, Boise, ID 83720-0096 (3-14-07)

03. Street Address. Len B. Jordan Building, 650 W State Street, Room 150, Boise, Idaho. (3-14-07)

04. Telephone. (208) 334-3390, Fax: (208) 334-5305 TDD: (208) 327-7040. (3-14-07)

05. Internet website at http://www.vr.idaho.gov/. (3-14-07)

006. PUBLIC RECORDS ACT COMPLIANCE.
These rules are subject to the provisions of the Idaho Public Records Act, Title 74, Chapter 1, Idaho Code. (3-14-07)

007. -- 009. (RESERVED)

010. DEFINITIONS.
For the purpose of the rules contained in this chapter, the following terms and abbreviations are used as herein defined.

(3-14-07)

01. CARF. The Rehabilitation Accreditation Commission, an international accrediting body of employment services providers.~~ The internet website for CARF is http://www.carf.org.~~ (3-14-07)

02. Customer~~Client~~. An individual residing in the state of Idaho who has applied for~~,~~ and who is eligible to receive~~,~~ EES~~Extended Employment Services~~. ~~from IDVR.~~ A customer~~Client~~ must be at least ~~eighteen~~sixteen (16~~8~~) years of age. ~~, unless such person is participating as part of a school work transition program, in which case such person must be at least sixteen (16) years of age. (3-14-07)~~

03. ~~Certified~~ Extended Employment Services (EES) Provider. A community rehabilitation program services ~~provider,~~provider sometimes referred to in these rules as a provider, that has been ~~certified~~approved by EES~~IDVR~~ program to provide e~~E~~xtended e~~E~~mployment s~~S~~ervices. (3-14-07)

04. Extended Employment Services. Long term maintenance services that assist customer~~Client~~s in maintaining employment, or in gaining employment skills in preparation for community employment, or which provide assistance to adult customer~~Client~~s with disabilities within an industry~~ial~~/business community setting or a community rehabilitation program, intended to maintain paid employment. Such services include individual supported employment, group community-based non-integrated supported employment, and work services. (3-14-07)

05. Individual Program Plan. The plan of EES~~Extended Employment Services~~ to be provided to individual customer~~Client~~s. (3-14-07)

06. IDVR. The Idaho Division of Vocational Rehabilitation, a state agency under the Idaho State Board of Education, with administrative oversight of the EES~~Extended Employment Services~~ p~~P~~rogram. (3-14-07)

07. RSAS. Rehabilitation Services Accreditation Systems, a national accrediting body of vocational services providers.~~ The internet website for RSAS is http://www.rsasnet.org.~~ (3-14-07)

011. -- 099. (RESERVED)

100. PROGRAM YEAR.~~CERTIFICATION OF PROVIDERS.~~

~~**01. Certification Required**. A provider must apply for and receive certification from IDVR, as provided herein, to provide Extended Employment Services to Clients. Such certification shall be for only the Extended Employment Services Program region in which such provider intends to provide services, and for which approval is granted by IDVR. (3-14-07)~~

01~~2~~. Program Year~~Time~~ and Application Submission Date~~line~~. For purposes of these rules, the EES~~Extended Employment Services~~ p~~P~~rogram fiscal year is July 1 ~~June 1~~ of a given year through June 30~~May 31~~ of the next succeeding year. ~~An~~ An EES Provider Agreement ~~application for certification~~ for a fiscal year must be submitted on or before the first business day of May~~April~~ preceding the fiscal year for which approval~~certification~~ is sought.

~~A written decision on certification status in regard to such application will be issued by IDVR on or before the first business day of May preceding such fiscal year. If approved by IDVR, certification status for a provider becomes effective on June 1, the first day of such fiscal year. An application that is denied may be reconsidered during the course of a fiscal year if there have been significant developments in a region that require IDVR to add a new or additional provider after June 1. In such event, IDVR will give preference to denied applications based on date of application. (3-14-07)~~

~~**03. Criteria**. IDVR will determine to grant or deny certification based on the following criteria: (3-14-07)~~

~~**a.** The provider must be accredited by CARF or RSAS; (3-14-07)~~

~~**b.** The provider must meet and maintain all the requirements for provider qualifications, specified in~~

~~Section 300 of these rules;~~ ~~(3-14-07)~~

~~**04. Grandfather Provision for Current Providers**. Upon the effective date of adoption of these rules, providers that have been paid by IDVR for Extended Employment Services that were provided to Clients during the month of May, 2006, and which comply in all respects with Section 300 of these rules, shall be grandfathered and deemed to be certified to provide Extended Employment Services in the region(s) in which they have provided services during such month.~~ ~~(3-14-07)~~

~~**05. Duration**. Once certified, an Extended Employment Service Provider (including a provider that is grandfathered under subsection 100.04.05 of these rules) retains certified status unless or until the certification is terminated or revoked by IDVR.~~ ~~(3-14-07)~~

101. -- 199. (RESERVED)

200. EXTENDED EMPLOYMENT SERVICES PROVIDER AGREEMENT.

01. Standard Form. Prior to providing ~~Extended Employment S~~services, a ~~Certified Extended Employment Services P~~provider shall enter into an annual EES~~Extended Employment Services~~ Provider Agreement with EES~~IDVR~~ program which will specify the terms and conditions of the approval~~appointment~~. Such agreement shall be on a standard form approved by ~~IDVR,~~ the EES program after consultation with the~~Certified~~ EES~~Extended Employment Services~~ p~~P~~rovider~~s~~s. Such EES Provider A~~a~~greement shall detail the provider requirements, services, scope of work, other special provisions, and fees. EES program will make the EES Provider Agreement available the first business day of April.

Approval to provide EES will be provided by EES program on or before the first business day of June preceding such fiscal year. If approved by EES program, a provider is eligible to deliver EES effective July 1, the first day of such fiscal year. An agreement that is denied may be reconsidered during the course of a fiscal year. The EES program has the discretion to add a new or additional providers after July 1 if there have been significant developments in a region that justify the need for new or additional providers. In such event, EES program will give preference to denied applications based on date of application. (3-14-07)

02. Annual Agreement. This agreement must be signed prior to the beginning of the EES~~Extended Employment Services~~ fiscal year by an authorized representative of the ~~Certified Extended Employment Services P~~provider and the IDVR ~~s~~State ~~A~~Administrator or a designee. (3-14-07)

03. Agreement ~~Subject to~~ Revision. Th~~is~~e agreement shall be entered ~~-~~into annually, and is subject to revision, as may be required by the EES program~~IDVR~~. EES program will provide providers notification of any changes to the agreement, with as much notification as possible. (3-14-07)

201. -- 299. (RESERVED)

300. PROVIDER QUALIFICATIONS.

An approved EES~~Certified Extended Employment Services~~ p~~P~~rovider shall meet all of the following requirements: (3-14-07)

01. A new provider must have a minimum of three (3) full years of experience working with customers who are receiving Medicaid Waiver and/or have worked with IDVR customers in employment services.

02~~1~~. Accreditation. Receive and maintain accreditation by CARF or RSAS. (3-14-07)

03~~2~~. All Staff Will: ~~. Assure that all its employees and subcontractors hired after August 10, 2006 who are providing Extended Employment Services:~~ (3-14-07)

a. Satisfactorily complete a criminal history background check, to be obtained by the provider; (3-14-07)

b. Are not less than eighteen (18) years of age and, if less than twenty-one (21) years of age, have not less than six (6) months experience with people with disabilities; (3-14-07)

c. Demonstrate the ability to deliver services as specified in the Individual Program Plan for each customer~~Client~~; and (3-14-07)

d. Document completion of not less than forty (40) hours of training directly related to vocational support for people with disabilities. Training must be documented no later than six (6) months from the date of hire and include all of the following topics: (3-14-07)

i. Behavior technology, especially positive behavioral support; (3-14-07)

ii. Instructional techniques; (3-14-07)

iii. Strategies for dealing with aberrant or maladaptive behavior; (3-14-07)

iv. Integration/normalization; (3-14-07)

v. Functional impact of disabilities, particularly developmental disabilities and mental illness; ~~and~~ (3-14-07)

vi. Strategies for remediation and accommodation;~~.~~ (3-14-07)

vii. Ethics and confidentiality;

viii. The development and use of measureable objectives; and

ix. Overview of assistive technology.

301. -- 399. (RESERVED)

400. TERMINATION OR REVOCATION OF PROVIDER STATUS.

EES program ~~IDVR~~ may terminate or revoke the approval ~~the certified s~~status ~~of,~~ and discontinue authorizing or purchasing services from~~,~~ a ~~Certified Extended Employment Services P~~provider~~s~~ for actions including, but not limited to the following: (3-14-07)

01. Loss of Accreditation. Failure to maintain accreditation from either CARF or RSAS; (3-14-07)

02. Out of Compliance. The provider is determined by EES~~IDVR~~ program to be out of compliance with these rules, or the EES~~Extended Employment Services~~ Provider Agreement. (3-14-07)

03. Business Practices. The provider is determined to be engaged in business practices that are inconsistent with sound fiscal practice; or (3-14-07)

04. ~~Client~~Customer Rights. The provider is determined to be in violation of customer~~Client~~ rights. (3-14-07)

401. -- 499. (RESERVED)

500. EXTENDED EMPLOYMENT SERVICES ~~CLIENT~~CUSTOMERS ~~-~~ – REFERRAL, ~~AND~~ ELIGIBILITY, AND CASE CLOSURE.

01. Referral. Each applicant to be a customer~~Client~~ for EES~~Extended Employment Services~~ under these rules will be referred by a Vocational Rehabilitation Counselor, employed by IDVR, who will provide the applicant with information on the services available from ~~Certified~~ EES~~Extended Employment Services~~ p~~P~~roviders. (3-14-07)

02. Eligibility. EES~~Extended Employment Services~~ program~~Specialists at IDVR~~ will assess the eligibility of each applicant for services~~Extended Eligibility Services.~~. Applicants who are eligible for and have access to other public funding sources for long term support services are not eligible for EES services. Eligible applicants must have a disability that falls into one of four categories described below, and such disability must constitute a barrier to such person maintaining paid employment without long term vocational support: (3-14-07)

a. Developmental Disabilities. Pursuant to Section 66-402, Idaho Code, a chronic disability of a person which appears before the age of twenty-two (22) years; and (3-14-07)

i. Is attributable to impairment, such as intellectual disability~~mental retardation~~, cerebral palsy, epilepsy, autism, or other condition found to be closely related to or similar to one of those impairments that requires similar treatment or services, or is attributable to dyslexia resulting from such impairments; (3-14-07)

ii. Results in substantial functional limitations in three (3) or more of the following areas of major life activity: self-care, receptive and expressive language, learning, mobility, self-direction, capacity for independent living, or economic self-sufficiency; and (3-14-07)

iii. Reflects the need for a combination and sequence of special, interdisciplinary or generic care, treatment or other services which are of life-long or extended duration and individually planned and coordinated. (3-14-07)

b. Mental Illness. A person has been assessed by a qualified professional and been diagnosed under DSM-IV or later editions with schizophrenia, schizoaffective disorder, major affective disorder, delusional disorder or a borderline personality disorder, in which ~~and~~ this psychiatric disorder must be of sufficient severity to cause a disturbance in role performance or coping skills in at least two of these areas on either a continuous or an intermittent (at least once per year) basis: vocational/academic, financial, social/interpersonal, family, basic living skills, housing, community, or health. (3-14-07)

c. Specific Learning Disability. A disorder in one or more of the psychological processes involved in understanding, perceiving, or using language or concepts (spoken or written). A disorder which may manifest itself in problems related to speaking, reading, spelling, or mathematical calculations (or to a lesser extent, listening, thinking, or writing), and seriously limit two or more functional capacities (mobility, communication, self-care, self-direction, work tolerance or work skills). (3-14-07)

d. Traumatic Brain Injury. A traumatically acquired insult to the brain that may cause physical, intellectual, emotional, social, and vocational changes. A closed head injury may be caused by a rapid acceleration/deceleration, as in a motor vehicle accident. An open head injury is visible insult and may be the result of an accident, gun~~-~~shot wound, or other physical injuries. Immediate effects are loss of consciousness, loss of memory, or change in vision, strength, coordination, or sensory function. Anatomical abnormalities may be present, such as cerebral hemorrhage or skull fracture. Long term effects may include physical, cognitive, and psycho-social-behavioral-emotional impairments. (3-14-07)

03. Case Closure. Cases will be closed from the EES program for the following reasons and will include documentation in the case record which supports such reason:

i. Unable to locate or contact;

ii. Customer is utilizing Medicaid Waiver services for CSE;

iii. Disability too significant to benefit from services;
iv. Customer is non-compliant or has not followed through with EES services;
v. Customer retired from employment;
vi. No longer interested in employment or receiving EES services;
vii. No longer needs EES services;
viii. Moved out of state;
ix. All other reasons.

501. -- 599. (RESERVED)

600. COVERED SERVICES.
The EES~~Extended Employment Services~~ that may be provided to customer~~Client~~s by ~~Certified Extended Employment Services P~~providers are described below. EES~~These services~~ typically follow the completion of other vocational rehabilitation services, such as vocational evaluation, job site development, and initial training at the job site. (3-14-07)

01. Individual Community Supported Employment. Self-~~-~~employment or paid employment which is: (3-14-07)

a. For a customer~~Client~~ paid not less than minimum wage and who, because of his or her disability(ies), needs ongoing support to maintain that employment; (3-14-07)

b. Conducted in a community or industry setting where persons without known paid work supports are employed; and (3-14-07)

c. Supported by authorized activities needed to sustain paid work by persons with disabilities, including but not limited to supervision, training, and transportation. (3-14-07)

02. Group Community-Based Non-Integrated Supported Employment. Self-~~-~~employment or paid employment which is: (3-14-07)

a. For a group of no more than eight (8) customer~~Client~~s who are paid not less than minimum wage and who, because of their disability(ies), need ongoing support to maintain that employment; (3-14-07)

b. Conducted in a variety of community and industry settings where the customer~~Client~~s have opportunities to interact with co-workers or others without known paid work supports at least to the extent that those opportunities typically exist in that work setting; (3-14-07)

c. Supported by training and supervision needed to maintain that employment; and (3-14-07)

d. Not conducted in the work services area of an EES~~Extended Employment Services~~ p~~P~~rovider. (3-14-07)

03. Work Services. The work services program utilizes individual and group work to assist individuals in understanding the value and demands of work, enhancing positive work attitudes, and developing functional capacities that will enhance the ability to achieve and maintain an employment outcome. Limited non-paid work related activities and transportation may be billed only when authorized on an Individual Program Plan. Work services are typically conducted on ~~Certified~~ EES~~Extended Employment Services~~ p~~P~~rovider premises. (3-14-07)

601. -- 699. (RESERVED)

700. EXCLUDED SERVICES.
Any other services provided by IDVR that are not described in subsection 600 of these rules shall not constitute

Extended Employment S~~S~~ervices. Such excluded services include, but are not limited to, the following: (3-14-07)

01. Vocational Evaluation; (3-14-07)

02. Work Adjustment; (3-14-07)

03. Job Site Development; or (3-14-07)

04. Initial Training at the Job Site. (3-14-07)

701. -- 799. (RESERVED)

800. SERVICE PROVISION.

01. Services on Individual Program Plan. EES~~Extended Employment Services~~ for each individual ~~Client~~customer must be based on the Individual Program Plan developed for such c~~Client~~ustomer. (3-14-07)

02. Development of Individual Program Plan. Those involved in developing the Individual Program Plan must include, but are not limited to, the following: (3-14-07)

a. The customer~~Client~~. Efforts must be made to maximize the customer~~Client~~'s involvement in the planning process by providing him or her with information and education regarding rights, and available options; and (3-14-07)

b. The customer~~Client~~'s legal guardian, if one has been appointed by the court; and (3-14-07)

c. ~~Certified~~ EES~~Extended Employment Services~~ p~~P~~rovider program staff, responsible for the implementation of the Individual Program Plan. (3-14-07)

03. Submission of the Individual Program Plan. The ~~Certified~~ EES~~Extended Employment Services~~ p~~P~~rovider must submit the Individual Program Plan to the ~~an~~ EES~~Extended Employment Services~~ p~~P~~rogram ~~Specialist~~ using the standard format provided or approved by the~~IDVR~~ EES program. The EES~~Extended Employment Services~~ p~~P~~rogram ~~Specialist~~ will either accept the Individual Program Plan as submitted, or may require revisions to the Individual Program Plan before acceptance. (3-14-07)

04. Timeline for Submission. The Individual Program Plan must be submitted to ~~an~~ EES~~Extended Employment Services~~ p~~P~~rogram ~~Specialist~~ within thirty (30) days from the beginning of the provision of EES~~Extended Employment Services~~. No payment will be made for EES~~Extended Employment Services~~ without receipt of the Individual Program Plan covering those Extended Employment Services. (3-14-07)

05. Revision. The ~~certified~~ EES~~Extended Employment Services~~ p~~P~~rovider must submit an updated Individual Program Plan for each customer~~Client~~ to the~~an~~ EES~~Extended Employment Services~~ p~~P~~rogram ~~Specialist~~ at least annually.

(3-14-07)

06. Progress Reports. The ~~Certified~~ EES~~Extended Employment Services~~ p~~P~~rovider must submit a progress report on each customer~~Client~~ to the~~an~~ EES~~Extended Employment Services~~ ~~P~~program ~~Specialist~~ at six (6) month intervals. A standardized format provided or approved by ~~IDVR~~ the EES program must be used. (3-14-07)

801. RECORDS.

01. ~~Client~~Customer Files. ~~Certified~~ EES~~Extended Employment Services~~ p~~P~~roviders shall maintain individual customer~~Client~~ files, which must include the following: (3-14-07)

a. Referral information; (3-14-07)

b. Eligibility; (3-14-07)

c. Authorization for services; (3-14-07)

d. Contact information; (3-14-07)

e. Legal guardianship information; (3-14-07)

f. Individual Program Plan; (3-14-07)

g. Progress Reports; (3-14-07)

h. Documentation of service; (3-14-07)

i. Satisfaction measures; (3-14-07)

j. Releases of information; and (3-14-07)

k. Documentation that updates to customer~~Client~~ information ~~were~~was provided to IDVR. (3-14-07)

02. **Storage**. Files must be maintained for five (5) years from the date of service~~discharge~~ of the customer~~Client~~ to whom the file pertains. (3-14-07)

802. -- 899. (RESERVED)

900. PAYMENT FOR SERVICES.

01. **Fee for Service**. The IDVR State Administrator shall set the fees for covered services, after discussion with ~~Certified~~ EES~~Extended Employment Services~~ p~~P~~roviders. Such fees shall be set forth in the annual EES~~Extended Employment Services~~ Provider Agreement. Such fees shall be reviewed annually, and may be adjusted by the IDVR State Administrator~~IDVR~~ to take effect at the beginning of the fiscal year. (3-14-07)

02. **Pre-Authorization**. All EES~~Extended Employment Services~~ must be pre-authorized by the ~~an~~ EES~~Extended Employment Services~~ p~~P~~rogram ~~specialist,~~ and shall be set forth in the Individual Program Plan for each customer~~Client~~.
(3-14-07)

03. **Billing Procedures**. (3-14-07)

a. ~~Certified~~ EES~~Extended Employment Services~~ p~~P~~roviders must submit a monthly billing statement for each customer~~Client~~ served, in a format approved by an EES~~Extended Employment Services~~ p~~P~~rogram ~~Specialist~~ and within timelines set forth in the annual EES~~Employment Services~~ Provider Agreement. (3-14-07)

b. Bills may only be submitted for EES~~Extended Employment Services~~ that have been identified and accepted by the~~IDVR~~ EES program, as stipulated~~set out~~ in an Individual Program Plan. (3-14-07)

c. All bills submitted by ~~Certified Extended Employment Services~~ p~~P~~roviders are subject to prepayment and post payment review. Documentation sufficient to support each payment item shall be available for review, and must be maintained for five (5) years from the date of service. The ~~Certified Extended Employment Services~~ ~~P~~providers must submit copies of the documentation regarding the provision of such services upon written request from an EES~~Extended Employment Services~~ program~~Specialist~~. (3-14-07)

04. **Audits**. EES program ~~IDVR~~ may perform audits of billing records and other documentation submitted by ~~Certified Extended Employment Services~~ ~~P~~providers in order to verify the accuracy of such records.(3-14-07)

05. Denial/Revocation of Payment. ~~IDVR~~ EES program may deny payment, or seek reimbursement or set-off for payments previously made, if the provider is not in compliance with these rules, the signed Employment Services Provider Agreement, or if the provider does not provide the services as set forth in a customer~~Client~~'s Individual Program Plan. (3-14-07)

901. -- 999. (RESERVED)

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CAREER TECHNICAL EDUCATION

SUBJECT

Proposed Rule IDAPA 55.01.03, Career Technical Education Secondary Programs – Career Technical Schools

APPLICABLE STATUTE, RULE, OR POLICY

Section 33-2202 through 33-2212, Idaho Code
Idaho Administrative code, IDAPA 55.01.03, Rules of Career Technical Schools

BACKGROUND/DISCUSSION

Career Technical Schools are designed to provide high end career and technical programs at the secondary level. These programs help prepare students for high-skill and in-demand careers; schools are closely linked to postsecondary education and business and industry.

In order to be approved as a school, Career Technical Schools are required to meet a number of criteria, including specific attendance zone requirements, the offering of advanced opportunities for enrolled students, and be located at a separate site than a non-Career Technical Secondary or be approved as a cooperative service agency.

Operationally, Career Technical Schools are required to meet specific programmatic requirements, including programs that are based on industry standards, demonstrate a responsiveness to labor market skills, and promote the development of leadership, interpersonal and other workplace skills through career and technical student organizations.

IMPACT

The impact of these changes will align Administrative Code to existing practices, will help ensure consistency in how funds for career technical schools are calculated, and will update the language regarding advanced opportunities to align with the language in Board Policy Section III.Y.

ATTACHMENTS

Attachment 1 – Proposed Rule changes to IDAPA 55.01.03 Page 3

STAFF COMMENTS AND RECOMMENDATIONS

Proposed rules have a 21 day comment period prior to becoming pending rules. Based on received comments and Board direction, changes may be made to proposed rules prior to entering the pending stage. All pending rules will be brought back to the board for approval prior to submittal to the Department of Administration for publication in the Idaho Administrative Rules Bulletin as a pending rule. Pending rules become effective at the end of the legislative session in which they are submitted.

Staff recommends approval.

BOARD ACTION

I move to approve the changes to proposed rule IDAPA 55.01.03 as submitted in Attachment 1.

Moved by __________ Seconded by __________ Carried Yes _____ No _____

IDAPA 55
TITLE 01
CHAPTER 03

55.01.03 - RULES OF CAREER TECHNICAL SCHOOLS

000. LEGAL AUTHORITY.
The State Board of Education is designated as the State Board for Career Technical Education and is responsible to execute the laws of the state of Idaho relative to Career Technical education, administer state and federal funds, and through the administrator of the State Division of Career Technical Education, coordinate all efforts in Career Technical education (Section 33-2202 through 33-2212, Idaho Code). (3-30-01)

001. TITLE AND SCOPE.

01. Title. The rules shall be cited as IDAPA 55.01.03, "Rules of Career Technical Schools." (3-30-01)

02. Scope. These rules serve the administration of Career Technical Education in Idaho and define the duties of the State Division of Career Technical Education. (3-30-01)

002. WRITTEN INTERPRETATIONS.
Written interpretations of these rules, if any, are on file at the office of the State Division of Career Technical Education. (3-30-01)

003. ADMINISTRATIVE APPEALS.
All appeals under these rules shall be conducted pursuant to the procedures set forth by the State Board of Career Technical Education. (3-30-01)

004. (RESERVED)

005. DEFINITIONS.

01. **Administrator**. An on-site school administrator, holding the appropriate career technical education administrator endorsement.

~~01~~02. Attendance Zones. For purposes of Section 33-1002G, Idaho Code, each high school is classified as an attendance zone. The attendance zone requirement can be met by having students enrolled in approved career technical school courses from at least two (2) high school zones within a district or at least two (2) high school zones in different districts participate in the career technical school. A minimum of fifteen percent (15%) of the total student body enrolled in an approved career technical school intermediate or capstone course must reside in attendance zones apart from the attendance zone of the majority of students. Cooperative Service Agencies must meet the fifteen percent (15%) attendance criteria on a program-by-program basis. (3-30-01)

0~~2~~3. ~~Dual Credit~~Advanced Opportunities. ~~Pursuant to~~Additional educational opportunities offered to students enrolled in career technical school programs, pursuant to state board of education governing policies and procedures. ~~Section 33-5109, Idaho Code, dual credit may be granted for Advanced Placement, College Level Examination Program, or Tech Prep class offerings that are approved through an accredited institution of higher education. This does not have to be a one (1) credit for one (1) credit articulation. Competencies from multiple classes can count toward postsecondary credit/credits.~~ (3-30-01)

~~03~~04. Field Experience. Paid or unpaid work experience such as business/industry internship, clinical experience, supervised occupational experience, job placement, school-based enterprise, or similar work experience setting. The field experience must be of sufficient duration and depth to add to the technical competencies of the student. (3-30-01)

~~04~~05. Career Technical~~Career Technical~~ Schools. Schools designed to provide high-end, state-of-the-art technical programs that foster quality technical education at the secondary level. Programs and services are directly related to the preparation of high school students for employment in current or emerging occupations that require other than a baccalaureate or advanced degree. These schools are closely linked to postsecondary education, thereby avoiding redundancy and maintaining rigor. They are also closely linked to current business and industry standards to ensure relevance and quality. (3-30-01)

006. -- 099. (RESERVED)

100. STATEMENT OF PURPOSE.

The purpose of this rule is to clearly define general implementation criteria, the criteria for approval for funding, the added cost unit calculation, the procedure to follow in calculating average daily attendance (ADA), the process to follow for fund distribution, and program accountability for Idaho Career Technical Schools. (3-30-01)

101. CAREER TECHNICAL SCHOOL GENERAL APPROVAL CRITERIA.

For approval, applying districts/~~consortiums~~ Cooperative Service Agencies must meet at least four (4) of the five (5) criteria listed in Section 33-1002G, Idaho Code. Approval criteria: (3-30-01)

01. High School Attendance Zones. Two (2) or more high school attendance zones. (3-30-01)

02. ~~Dual Credit~~Advanced Opportunities. (3-30-01)

03. Field Experience. (3-30-01)

04. Funded as a Separate School. (3-30-01)

05. Separate Site or Cooperative Service Agency. Located at a separate site or approved by the State Board of Education as a cooperative service agency. (3-30-01)

102. CAREER TECHNICAL COMPONENT CRITERIA.

01. Program Criteria. Career Technical schools are intended to deliver high-end technical education programs that go beyond the scope of traditional Career Technical education. The lab should be appropriately designed for the type of program and the number of students enrolled. The program should have state-of-the-art equipment, current technology and strong links to business and industry. (3-30-01)

02. Career Technical School Program. Each program of a Career Technical school shall: (3-30-01)

a. Be based on industry standards that are measurable using a competency-based evaluation system. (3-30-01)

b. Demonstrate a responsiveness to students' needs and to labor market needs. (3-30-01)

c. Contain a sequence of instruction that follows a set of industry competencies. (3-30-01)

d. Reinforce basic and advanced academic skills. (3-30-01)

e. ~~Have at least one (1) dual credit technical course or be approved for postsecondary credit as part of a Tech Prep agreement.~~Meet the all of required standards defined through Technical Competency Credits, as outlined in State Board of Education Governing Policies and Procedures Section III.Y. and as aligned among participating postsecondary institutions. (3-30-01)

f. Promote access and equity for all students and school personnel. (3-30-01)

g. Incorporate active input from an appropriately qualified business/industry technical advisory committee. (3-30-01)

h. Ensure that all programs implement instructional delivery methods that use current teaching and industry technologies. (3-30-01)

i. Employ instructors who hold Career Technical certification to teach the occupation and who also hold a related industry-based credential or equivalent as approved by the Division of Career Technical Education. (3-30-01)

j. Promote the development of leadership, interpersonal and other cross-functional workplace skills through Career Technical student organizations ~~or other appropriate means~~. (3-30-01)

k. Ensure that the instructional setting is appropriate and effective regarding: (3-30-01)

i. Student-teacher ratios. (3-30-01)

ii. Number of lab work stations. (3-30-01)

iii. Number of quality work-experience sites. (3-30-01)

iv. Safety. (3-30-01)

v. Work-experience agreements. (3-30-01)

vi. Facility maintenance. (3-30-01)

103. APPLICATION PROCESS.
Applications for Career Technical school funding must be received by the Division of Career Technical Education on or before ~~the first Friday in July~~ April 15 for the following fiscal year. In the case of application renewals, failure to meet the application deadline will result in a 25 percent reduction in CTS funding. In the event of a new school application, failure to meet the application deadline will result in a denial of the application. (3-30-01)

104. CAREER TECHNICAL SCHOOL ADDED COST UNIT FUNDING.
Section 33-1002G, Idaho Code, provides school districts an opportunity to establish Career Technical schools that qualify for funding appropriated for the specific purpose of supporting the added cost of Career Technical schools. The funds are appropriated to the State Board for Career Technical Education to be expended by the Division of Career Technical Education. Funding is based on the average daily attendance (ADA) of students enrolled in the career technical school. (3-30-01)

105. CAREER TECHNICAL SCHOOL AVERAGE DAILY ATTENDANCE.
The Division of Career Technical Education shall use the enrollment reports sent to the State Department of Education to calculate Career Technical school average daily attendance (ADA) in accordance with applicable laws and rules (Section 33-1002, Idaho Code). Students in attendance at a qualifying Career Technical school shall be reported as aggregate hours and/or aggregate attendance. The aggregate hours and aggregate attendance will be combined to calculate the ADA for the career technical school. (3-30-01)

01. Aggregate Hours. The daily hours of all students enrolled in career technical school approved intermediate and capstone courses who attend less than two and one-half (2.5) hours per day shall be added together and reported as weekly aggregate hours. (3-30-01)

02. Aggregate Attendance. Students enrolled in career technical school approved intermediate and capstone courses who attend ~~attending~~ more than two and one-half (2.5) hours per day are to be reported as aggregate attendance. (3-30-01)

106. CAREER TECHNICAL SCHOOL ADDED COST UNIT CALCULATION.
The Division of Career Technical Education shall use the Career Technical school average daily attendance (ADA) as the basis for added cost unit funding. (3-30-01)

01. State Support Unit Value. The added cost support unit value shall be based on state salary-based apportionment, state paid employee benefits (less state unemployment), base support, and safe environment distribution factors found in the Public School Support Program. (3-30-01)

02. Support Unit Divisor. Added cost support units for Career Technical schools shall be calculated by using the secondary support unit attendance divisor of eighteen and one-half (18.5) as shown in Section 33-1002(6), Idaho Code. (3-30-01)

03. Added Cost Support Factor. The added cost support factor for Career Technical schools shall be calculated by multiplying point thirty-three (.33) times the added cost support units generated in the Career Technical school. (3-30-01)

04. Estimated Reimbursement. The estimated reimbursement shall be calculated by multiplying the state support unit value by the added cost support factor. (3-30-01)

107. CAREER TECHNICAL SCHOOL ADDED COST UNIT FUND DISTRIBUTION.
Once the Career Technical appropriation is made, the per unit value will be determined by dividing the total units into the appropriation. (3-30-01)

01. Payment Distribution. Added cost support unit funds shall be distributed by the Division of Career Technical Education in two (2) payments: (3-30-01)

a. Seventy percent (70%) of the total estimated funds for which a Career Technical school is eligible shall be distributed each year following receipt of first-period enrollment data from the Department of Education. (3-30-01)

b. Based on actual support units generated during the year, the balance shall be distributed each year by July 15th. (3-30-01)

02. Reduced Funding. In the event that the legislature does not appropriate enough funds to cover at least ninety percent (90%) of the calculated per unit value, preference will be given to existing schools and funding will not be reduced to less than ninety percent (90%) of the previous year's level. (3-30-01)

03. Adjusted Distribution. In the event that program growth exceeds the amount of the requested appropriation on a given year, the distribution of funds to each Career Technical school will be based on the projected ADA from the Annual Application or the actual ADA from the enrollment reports, whichever is smallest. (3-30-01)

108. ACCOUNTABILITY.

01. Assessment Process. The Division of Career Technical Education shall develop an assessment process that includes measures and standards for Career Technical school programs. (3-30-01)

02. Administrator Responsibility. The administrator of each career technical school shall be responsible to provide onsite administration of the career technical school and submit all required career technical school documentation, as outlined by the Division of Career Technical Education.~~a complete report for each program on the measures and standards at the end of each fiscal year.~~ (3-30-01)

03. Accreditation. Each Career Technical school shall be accredited following Department of

Education guidelines. This accreditation shall be appropriate for the individual type of Career Technical school that is developed. (3-30-01)

04. School Improvement Plan. The administration, faculty and staff at each Career Technical school shall be responsible to develop and implement a local school improvement plan based on the assessment process. (3-30-01)

109. -- 999. (RESERVED)

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TAB	DESCRIPTION	ACTION
1	**BOARD POLICY III.O. COURSE PLACEMENT– FIRST READING**	Motion to Approve
2	**FIVE-YEAR PROGRAM PLAN**	Motion to Approve
3	**ANNUAL PROGRAM PRIORITIZATION REPORT**	Motion to Approve
4	**BOISE STATE UNIVERSITY – ONLINE GRADUATE CERTIFICATE IN EDUCATIONAL GAMING AND SIMULATION**	Motion to Approve
5	**EPSCOR ANNUAL REPORT**	Information Item
6	**CHAIRMAN'S UPDATE**	Information Item

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SUBJECT

Board Policy III.O.—Course Placement—First Reading

REFERENCE

June 2015	Board approved Repeal of Board Policy III.O. Equivalency Schedules.
October 2015	Board approved waiver of Board Policy III.Q.4.c, Admissions Placement Scores.

APPLICABLE STATUTES, RULE OR POLICY

Idaho State Board of Education Governing Policies & Procedures, Section III.Q.4.c

BACKGROUND / DISCUSSION

At its October 2015 meeting, the State Board of Education (Board) waived for a third and final time the placement section of Board policy III.Q.4.c. This section of policy covers placement in entry-level college courses and was waived until the end of the 2016 calendar year to allow for the creation and adoption of new placement mechanisms, especially in the wake of the news that ACT would be discontinuing the widely used COMPASS test at the end of CY2016.

The new placement mechanisms and processes currently under development by the institutions will be reviewed by the Chief Academic Officer and the Council on Academic Affairs and Programs (CAAP) prior to implementation.

The adoption of this policy will serve two primary purposes. First, it will allow the institutions to design and implement placement processes and mechanisms that allow them to properly place their students. Second, it will serve the Board's desire to ensure each institution's placement processes and expectations are found in a single location (much like the graph in Board Policy III.Q.4.c).

IMPACT

Approval of the proposed amendments would create a separate section of Board Policy regarding course placement and replace the current statewide placement policy.

ATTACHMENTS

Attachment 1 – Section III.O. "Course Placement" – First Reading. Page 3

STAFF COMMENTS AND RECOMMENDATIONS

Given that course placement and college admissions are sufficiently separate areas of operation, CAAP recommends giving placement its own section of Board Policy. The proposed policy would create a new section of policy. CAAP recommends extracting Board Policy III.Q.4.c (currently under waiver) from III.Q and placing it in III.O. Board Policy III.Q is also in the early stage of being revised.

Currently, Board Policy III.Q.4.c provides one location where current placement related cut scores can be identified. While cut scores are currently waived, CAAP believes it still remains important for all critical placement related information to be located in one place.

This proposed policy was recommended for approval by CAAP at its May 26 meeting and recommended for approval by the Instruction, Research and Student Affairs (IRSA) at its July 21, 2016 meeting.

Staff recommends approval.

BOARD ACTION

I move to approve the first reading of the new section of Board policy III.O. Course Placement, as presented in Attachment 1.

Moved by____________ Seconded by_____________ Carried Yes____ No____

Idaho State Board of Education

GOVERNING POLICIES AND PROCEDURES

SECTION: III. POSTSECONDARY AFFAIRS

SUBSECTION: O. Course Placement **October 2016**

1. Coverage

   Boise State University, College of Western Idaho, College of Southern Idaho, Eastern Idaho Technical College, Idaho State University, Lewis-Clark State College, North Idaho College and University of Idaho are included in this subsection, herein referenced as "institution."

2. Academic College and University Course Placement

   a. Each institution shall submit their academic course placement policies to the Office of the State Board of Education for publication in a single online location.

   b. Any amendments made to an institution's academic course placement policy must immediately be submitted to the Office of the State Board of Education for updating the published policy.

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SUBJECT

Five-Year Program Plan

REFERENCE

August 2012	The Board approved the first iteration of the Five-Year Program Plan.
August 2013	The Board approved the Five-Year Program Plan update.
August 2015	The Board approved the Five-Year Program Plan update.

APPLICABLE STATUTE, RULE, OR POLICY

Board Policy Section III.Z. Planning and Delivery of Postsecondary Programs and Courses, Section 33-113, Idaho Code.

BACKGROUND/DISCUSSION

Section 33-113, Idaho Code requires the Board, in the interest of efficiency, to define the limits of instruction at all publicly funded institutions, and to limit wasteful duplication to the extent practicable. Board Policy III.Z. sets the method by which the Board limits duplication or evaluates the need for duplication as well as assigns responsibility for assessing the educational and workforce needs around the state.

Board Policy III.Z.2.a.ii. requires institutions to create program plans in alignment with their Statewide and Service Region Program responsibilities that describe proposed programs to be offered over a five year period and all programs currently offered. Board staff reviews institution plans for alignment with statutory and policy requirements, program responsibilities, and duplication.

On April 12, 2016, Board staff coordinated a work session with the provosts to review draft institution plans, statewide needs, and to identify and discuss programs that could potentially be viewed as duplicative or in conflict with Statewide Program responsibilities. This year, Board staff worked with the Division of Career and Technical Education (CTE) to coordinate the work session that would include a section for CTE programs, separate from academic programs.

The Five-Year Program Plan represents proposed programs for Academic Years 2016-17, 2017-18, 2018-19, 2019-20, and 2020-21.

IMPACT

The Five-Year Plan will provide a comprehensive picture of anticipated institutional academic program development. The Five-Year Plan is intended to serve as the foundation for advising and informing the Board in its efforts to coordinate educational programs throughout the state. Approval of the Five-Year Plan will provide the institutions with the ability to proceed to a program proposal development stage.

ATTACHMENTS

Attachment 1 – The Five-Year Plan Page 3

STAFF COMMENTS AND RECOMMENDATIONS

Institutions met on April 12, 2016 to review proposed programs, discuss areas of concern, and potential collaboration opportunities. Last year, staff reported that the College of Western Idaho (CWI) is proposing an Associate of Applied Science in Radiologic Technology for the 2019-20 academic year. Boise State University had at that time expressed concerns about the likely competitiveness of clinical sites for its existing B.S., Diagnostic Radiology program if CWI were to offer a Radiologic Technology program in the Treasure Valley. Both institutions reiterated that ongoing discussion is necessary as CWI continues to explore the viability of the proposed program. There were no other programs identified for future discussion.

The following represents a number of partnerships between institutions that are in progress or in the discussion stages.

UI	Computer Science, BS with NIC (Fall 2016)
ISU and CWI	Pharmacy Technology with NIC
BSU	-Joint Master of Public Administration & JD program – with UI (Fall 2018) -Criminal Justice, BS – with CWI (Fall 2017)
LCSC	Athletic Training, MS with UI (3+2) (in progress)
EITC	Medical Technician with ISU (discussion)
NIC	-Cybersecurity, AAS with UI (Fall 2017) -Medical Laboratory Technology, AAS w/5 technical colleges (Fall 2017)

IRSA reviewed the five-year plan at their July 21, 2016 meeting and will be prepared to discuss at the Board's meeting.

Staff recommends approval of the Five-Year Plans as submitted in Attachment 1.

BOARD ACTION

I move to approve the Five-Year Plan as submitted in Attachment 1.

Moved by __________ Seconded by __________ Carried Yes _____ No _____

State of Idaho

Board of Education

Five-Year Program Plan

Delivery of Postsecondary Programs and Courses

Prepared by
The Office of the State Board of Education

Table of Contents

Five-Year Plan
Delivery of Postsecondary Programs

The State Board of Education established in alignment with Board Policy III.Z., a comprehensive process for the planning and delivery of postsecondary education. Consistent with this policy, institutions create an institution plan that describes all current programs and proposed programs to be offered in alignment with each institution's Statewide and Service Region Program Responsibilities. The process requires that institutions provide a level of programmatic information for each current program being offered and for each proposed program as part of the five-year plan development.

Statewide Program Responsibility
In accordance with Board Policy III.Z.1.g, "Statewide Program Responsibility shall mean an institution's responsibility to offer and deliver a Statewide Program in all regions of the state. Statewide Program Responsibilities are assigned to a specific institution by the Board, taking into account the degree to which such program is uniquely provided by the institution."

Service Region Program Responsibility
In accordance with Board Policy III.Z.1.e, "Service Region Program Responsibility shall mean an institution's responsibility to offer and deliver a Service Region Program to meet regional educational and workforce needs in its service region as defined in subsection 2.b.ii (1) and (2). Service Region Program Responsibilities are assigned to the Designated Institution in each service region, but may be offered and delivered by Partnering Institutions in accordance with the procedures outlined in this policy."

The Five-Year Plan specifically consists of proposed programs institutions have identified they will pursue over a five-year period. As proposed programs are developed, institutions must follow the program review process and procedures provided in Board Policy III.G, Postsecondary Program Approval and Discontinuance to acquire appropriate approvals prior to implementation of programs. If the program is to be delivered outside the institution's service region, a Memorandum of Understanding must be developed and agreed upon in cooperation with the Board's Chief Academic Officer prior to implementation.

The Plan also consists of a complete program inventory of programs currently being offered by Idaho's public postsecondary institutions. Programs are listed by CIP code and then alphabetically by institution. The list includes programs, options, and degrees offered through various departments and colleges.

Consistent with Board Policy III.Z., the Plan is updated on an annual basis. It is intended that the Five-Year Plan will provide guidance to the State Board of Education in its planning and coordination of educational programs.

Delivery of Programs

Consistent with Board Policy III.Z., “Statewide Program Responsibilities are assigned to a specific institution by the Board, taking into account the degree to which such program is uniquely provided by the institution.” The statewide program list is reviewed for alignment by the Board every two years.

Boise State University
Boise State University shall have responsibility to assess and ensure the statewide delivery of all educational programs in the following degree program areas:

Program Name	Degrees
Public Policy	M.S., Ph.D.
Public Administration	Ph.D.
Community & Regional Planning	M.C.R.P., Ph.D.
Social Work (Region V-VI —shared with ISU)	M.S.W.
Social Work	Ph.D.

Board approved December 18, 2013

Idaho State University
Idaho State University shall have responsibility to assess and ensure the statewide delivery of all educational programs in the following degree program areas:

Program Name	Degrees
Audiology	Au.D., Ph.D.
Physical Therapy	D.P.T., Ph.D.
Occupational Therapy	M.O.T.
Pharmaceutical Science	M.S., Ph.D.
Pharmacy Practice	Pharm.D.
Nursing (Region III shared w/ BSU)	M.S., D.N.P.
Nursing	Ph.D.
Physician Assistant	M.P.A.S.
Speech Pathology	M.S.
Deaf Education	M.S.
Educational Interpreting	B.S.
Health Education	M.H.E.
Public Health	M.P.H.
Health Physics	B.S., M.S., Ph.D.
Dental Hygiene	B.S., M.S.
Medical Lab Science	B.S., M.S.
Clinical Psychology	Ph.D.

Board approved December 18, 2013

University of Idaho
University of Idaho shall have responsibility to assess and ensure the statewide delivery of all educational programs in the following degree program areas:

Program Name	Degrees
Law	J.D.
Architecture	B.S. Arch., M. Arch.
Integrated Architecture & Design	M.S.
Landscape Architecture	B.S.L.A., M.L.A.
Interior Design	B.I.D., M.S.
Animal & Veterinary Science	B.S.A.V.S.
Animal Science	M.S.
Veterinary Science	D.V.M.
Plant Science	M.S., Ph.D.
Agricultural Economics	B.S.Ag.Econ
Applied Economics (Agricultural)	M.S.
Food Science	B.S.F.S., M.S., Ph.D.
Forest Resources	B.S.For.Res.
Renewable Materials	B.S.Renew.Mat..
Wildlife Resources	B.S.Wildl.Res.
Fishery Resources	B.S.Fish.Res.
Natural Resource Conservation	B.S.Nat.Resc.Consv.
Rangeland Ecology & Management	B.S.Rangeland.Ecol.Mgmt.
Fire Ecology & Management	B.S.Fire.Ecol.Mgt.
Natural Resource concentrations in: • Forest Resources • Renewable Materials • Wildlife Resources • Fishery Resources • Natural Resource Conservation • Rangeland Ecology & Management • Fire Ecology & Management	M.S., M.N.R., Ph.D.

Board approved December 18, 2013

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FIVE-YEAR PLAN
Proposed Regional and Statewide Programs

Institution Name: University of Idaho

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
Program offerings commencing 2017-2018								
Master of Business for Veterans	master's level	Region II	Regional	Summer 2017	Distance (Blackboard) modality: Development of a new online Master Degree targeted to the unique skills and experiences of U.S. Veterans is being discussed in the college and the college expects to submit a detailed program proposal.	Internal reallocation for program startup		
Chinese Language	B.A.	Region II	Regional	Summer 2017	Hybrid/combination modality: A degree program that will provide students with the necessary language skills to meet the needs of developing global markets. Demand for Chinese language skills in the fields of agriculture, engineering, business, education, architecture, and the sciences are growing. U.S. and Idaho companies are actively seeking out bilingual staff who can help them expand and develop markets within China and in the U.S. The UI Confucius Institute offers Chinese langauge courses through the department of modern languages and cultures. Expanding to Region III furthers the mission in accordance with Confucius Institute Headquarters in Hanban. MOU with Hanban signed in 2012.	Reallocation		
Film Studies	B.A./B.S.	Region II	Regional	Summer 2017	Hybrid: New joint B.A. and B.S. degrees in film studies builds upon existing faculty strengths and courses already offered. Taught on the film school model, students will learn how to think critically and historically about film and culture while learning the fundamentals of film writing and film making.	Reallocation		
1st year curriculum for Juris Doctor	J.D.	Region III	State-wide	Summer 2017	Traditional/hybrid combination modality: 1st year curriculum to be delivered in Boise (phased in), with the existing 3rd and 2nd years.	Reallocation		

Institution Name: University of Idaho

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
Law	BS/BA	Region II	Regional	Summer 2017	Hybrid: The BS/BA in law would be among only two or three in the country and would give students the opportunity to study law in the context of an undergraduate liberal arts curriculum. The course of study will introduce students to core skills and concepts related to legal reasoning and the operation of legal institutions in their domestic and global context.	Reallocation		
Medical Science	B.S.	Region II	Regional	Summer 2017	Traditional Modality: This new degree program would serve to provide better advising opportunities and focus for students interested in preparation for medical school. It will not be a requirement for students with that career focus to enroll in this major, as we already have students from majors all across campus who successfully prepare for entrance to medical school -- this would simply provide another possible major for these students, and would consolidate the most appropriate coursework for their preparation in a single curriculum.	Reallocation		
Program offerings commencing 2018-2019								
Mathematics Education	Ph.D.	Region II	Regional	Summer 2018	Traditional modality: The PhD in Mathematics Education Degree prepares students to pursue a career as a College Professor specializing in pre-service and in-service education of Mathematics teachers as well as the furthering of research in Mathematics Education.	Reallocation		

Institution Name: University of Idaho

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
Master's of Science in Nutrition	M.S.	Region I and Region II and Region III	Regional	Summer 2018	Online & Hybrid/combination modality: The Master's of Science in Nutrition will provide courses related to the science and behavior of nutrition, feeding, eating, and food preparation. This meets the mandate of the Accreditation Council for the Education of Nutrition and Dietetics requiring all registered dietitian nutritionists to hold an MS degree. The program is offered in Region II with faculty and clinical placements occurring in both Region I and Region III. There will be two options, one for current registered dietitans and an option for undergraduates pursuing the career.	Reallocation		
Industrial Technology (INDT)	B.S.Tech.	Region I	Regional	Summer 2018	Traditional modality & Distance via Engineering Outreach: Industrial Technology provides students the ability to lead industry operations that are becoming more technical in nature and supervise direct labor. This degree bridges the gap between engineering degrees and technology degrees. There have been numerous requests to extend the program to CdA center campus.	Reallocation		
Statistics	B.S.	Region II	Regional	Summer 2018	Traditional Modality: The BS in Statistics meets a growing need for students able to understand the science of collecting, analyzing, and interpreting information. With the explosion of data available in most fields, this degree meets a growing need. This degree will result from essentially taking the Applied Statistics and Actuarial Science options in the BS degree in Mathematics and converting them into this new degree. (That is, we would move responsibility for these majors from options within the current Mathematics B.S. to a new major administered by the Department of Statistical Science.) Only minor changes would need to be made to those options to conform with national standards for a BS in Statistics. Nationally, the BS in Statistics is a fast-growing degree.	Reallocation		

Institution Name: University of Idaho

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
German	B.A.	Region II	Regional	Summer 2018	Traditional/hybrid/study abroad modality: A degree program that provides students with the linguistic and cultural competencies to meet the needs of the global market. US companies seeking to operate in the EU, and German companies with a presence in North American and worldwide, recruit students who can work in a multicultural, German-and English-speaking environment. German is a high-value qualification in engineering and other STEM fields, music, architecture, arts management, archaeology, psychology, banking, business, and education.	Reallocation		
Emerging Digital Media	M.A./M.S.	Region II	Regional	Summer 2018	Distance modality: Emerging media technologies are continually transforming media industries and media communication. The M.A./M.S. degrees allows media professionals and others seeking advanced credentials to develop skills in the effective use of emerging media forms. Potential students will include JAMM students seeking advanced media instruction as well as regional media and business professionals.	Reallocation		
Women's and Gender Studies	B.A./B.S.	Region II	Regonal	Summer 2018	Hybrid modality: The B.A./B.S. program would provide students with a solid foundation in Women's and Gender Studies through course work that covers historical, sociological, political science, psychological, and cultural perspectives related to the study of women and men in society. The delivery method of the program would comprise a hybrid format of traditional and online modules for life-long learning opportunities that include courses addressing diversity and cultural competencies crucial for employment in many sectors today. These employment sectors include but are not limited to professions for both, women and men, in education, business, law, human resources, social services, media and communication, government, non-profit, and international organizations.	Reallocation		

Institution Name: University of Idaho

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
Program offerings commencing 2019-2020								
American Indian Studies	B.A./B.S.	Region II	Regional	Summer 2019	Hybrid/combination modality: B.A./B.S. In collaboration with Washington State University and the ten MOU Tribes, offer a rigorous curriculum that introduces the student to the academic field of American Indian Studies, as well as provides the necessary skills and ethical responsibilities to professionally engage with and work in American Indian communities.	Reallocation		
Jazz Studies	B.M.	Region II	Regional	Summer 2019	Traditional modality: A B.M. degree program focusing on instrumental jazz performance, arranging/composing and pedagogy, in preparation for careers as professional performers, composer/arrangers and educators.	Reallocation		
Sociology	M.A./M.S.	Region II	Regional	Summer 2019	Hybrid/combination modality: M.A/M.S.; Focused on applied social science research/analysis. Applicable to non-profits, government agencies, and private industry. Research design, methods, evaluation, policy analysis, statistics, theory, internships, and reporting. Emphasis on human communities, attention toward addressing nationally significant questions at a community level. Program contributes research on social dimensions of any problem.	Reallocation		
Communication	B.A./B.S.	Region II	Regional	Summer 2019	Hybrid: A degree in Communication focuses on how people verbally and nonverbally communicate at the individual, societal, and cultural levels. Students with degrees in Communication pursue careers as communication specialists and managers in a range of industries. This major was previously offered at the University of Idaho and had healthy enrollments and major count (100 to 150 majors), but was discontinued during the last recession in an effort to cut costs.	Reallocation		

Institution Name: University of Idaho

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
Program offerings commencing 2020-2021								
Music Education	Ph.D.	Region II	Regional	Summer 2020	Hybrid/combination modality: The Ph.D. Program is designed to meet the needs of an experienced music educator who wishes to pursue a terminal degree in music education. It is appropriate for those wishing to meet high professional standards in secondary schools, those wishing to prepare themselves for college teaching, or those wishing to become lead administrators in education.	Reallocation		
Anthropology	Ph.D.	Region II	Regional	Summer 2020	Hybrid/combination modality: The Ph.D. program offers a four-field background in anthropology and offers particular specialization in archaeology and applied collaborative anthropology. In archaeology, the area of expertise is in historical archaeology and Plateau archaeology.	Reallocation		

FIVE-YEAR PLAN
Proposed Regional and Statewide Programs

Institution Name: **Idaho State University**

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
Program offerings commencing 2016-2017								
Master of Arts in Teaching (MAT) and/or Secondary Education Teacher Certification	Certificate/ Master degree	Region V	Regional	2016-2017	The Master of Arts in Teaching (MAT) Program is designed for students who are just finishing undergraduate studies or working professionals making a career change. The MAT program requires students to possess an undergraduate degree. The program results in secondary (6-12) certification and the ability to conduct action research in the classroom to improve teaching and learning. The secondary certification can also be pursued without the MAT. To be offered On-line w/distance learning site seminars	New budget request		
Program offerings commencing 2017-2018								
Animal Assisted Therapy in Counseling Certificate	Certificate	Regions IV, V, VI	Regional	2017-2018	Conceptual coursework and applied experience relevant to Animal Assisted Therapy in Counseling. When implemented with the appropriate education and training, this approach has the potential to impact the therapeutic experience of a diverse range of clients across a wide variety of settings. To provide this intervention ethically and effectively, specialized knowledge and training are necessary. The Certificate in Animal Assisted Therapy will consist of three, 3-credit courses – Introduction to Animal Assisted Therapy, Best Practices in Animal Assisted Therapy, and Applied Practice. Method of Delivery: Face-to-face	Existing Resources		

Institution Name: **Idaho State University**

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
Applied Linguistics	MA	Region V	Regional	2017-2108	This interdisciplinary program will provide foundational knowledge in general linguistics with advanced knowledge and training in two main applied areas: teaching of English to speakers of other languages and language revitalization and maintenance. Method of Delivery: Face-to-face	Reallocation of teaching assignments within existing faculty.		
Bachelor of Business Administration	BBA	Regions IV, V, VI	Regional	2017-2018	The objective of ISU's BBA program is to assist students to take their places in business & society, domestic & worldwide. The program develops in students inquiring minds and critical thinking so they can analyze problems, implement courses of action, and function within an organization. Method of Delivery: Traditional/Hybrid/ Online	Reallocation of resources, new budget requests		
Master of Business Administration	MBA	Regions IV, V, VI	Regional	2017-2018	The traditional MBA provides a broad general degree particularly suited to those pursuing a managerial focus in their careers. The Accounting, Informatics, Finance, Health Care Administration, Project Management, & Marketing options provide specialized knowledge relating to their respective fields. The Accounting emphasis meets the needs of students who wish to satisfy requirements for certification as public accountants (CPA) or certification as management accountants (CMA). Method of Delivery: Traditional/Hybrid/Online	Reallocation of resources, new budget requests		

Institution Name: **Idaho State University**

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
Community College Education	EdD	Region V	Regional	2017-2018	Ed.D. in Educational Leadership with an emphasis in Community College Leadership. The emphasis would share the current EdD Core classes, most of the Higher Education Concentration courses, and five “specialty” courses, two of which would be concentrated residential summer classes with a close relationship with instate community colleges. Method of Delivery: Traditional/ Hybrid	Reallocation of vacant position		
Computer Science	MS	Region V	Regional	2017-2018	The computer science program helps students gain the following abilities: An awareness and commitment to one's ethical and social responsibilities, an understanding that life-long learning is an integral part of personal, professional, and social interaction, the requisite qualifications for obtaining employment as a Computer Scientist, and the requisite qualifications for pursuing an advanced degree in Computer Science or a related field, particularly when the curriculum is augmented with additional selected math courses. Method of Delivery: Traditional	Reallocation of Resources		
Master of Science in Data Analytics	MS	Regions V	Regional	2017-2018	The MS in Data Analytics immerses students in a comprehensive and applied curriculum exploring the underlying data science, information technology, and business of analytics. The degree provides students with advanced analytical training to develop their ability to draw insights from big data, including: data collection, preparation and integration; statistical methods and modeling; and other sophisticated techniques for analyzing complex data. The program is highly applied in nature, integrating business strategy, project-based learning, simulations, case studies, and specific	Reallocation of resources, new budget requests		

Institution Name: **Idaho State University**

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
					electives addressing the analytical needs of various industry sectors. Supplemented by an internship placement and industry supplied projects, graduates will be exceptionally well-equipped to harness and communicate the full value of data to the organizations they serve. Method of Delivery: Hybrid/Online			
Advanced Dental Hygiene Education	PhD	Regions III, V	Statewide	2017-2018	The PhD program in dental hygiene is designed to create a cadre of dental hygiene researchers, scholars and educators, to provide advanced education for those oral health professionals who seek careers in research and academia, and to expand the body of knowledge in the dental hygiene discipline. This doctoral level program will be delivered online and open to the international community of dental hygienists. This program meets the vision of the department to be the premier global dental hygiene center of education, practice, leadership, and scholarship. Method of Delivery: Online	Student Professional Fees		
Entrepreneurship	Certificate	Region IV, V, VI	Regional	2017-2018	The Certificate in Entrepreneurship provides a strong foundation for launching and successfully operating a small business venture. The curriculum spans all stages of small business development, from defining an idea to finding and managing your finances to building marketing strategies and managing your operation. The capstone course teaches you how to finalize your business plan and put into practice the next steps to executing and managing a successful business. Method of Delivery: face-to-face	Reallocation of resources		

Institution Name: **Idaho State University**

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
Masters in Healthcare Administration	MHA	Region V	Regional	2017-2018	The online MHA would be an innovative, student-centered program that uses a cohort model where students progress through the program together as members of a learning team. The program will be designed for both full-time students and working professionals who prefer learning anytime and anywhere. To reduce program costs and maximize the deployment of faculty talent and resources across the University, the online MHA program would be jointly delivered between the KSHP/Division of Health Sciences and the College of Business (COB). Method of Delivery: On-line	New and reallocation of resources.		
Health and Wellness Coaching Certificate	Undergraduate Certificate	Regions IV, V	Regional	2017-2018	Health and Wellness Coaching will be an undergraduate certificate which prepares students to work with individuals who want to make changes to their lifestyle in order to improve health. The certificate will focus on behavior change theories and application, dimensions of wellness, and application of wellness coaching skills. Students will be required to complete a practicum. Method of Delivery: Hybrid	Reallocation of resources		
Certificate of Instructional Technology & Design	Graduate Certificate	Regions IV, V, VI	Regional	2017-2018	The Certificate of Instructional Technology and Design would be 15 credits, sharing 5 current M.Ed. in Instructional Technology courses taught by current M.Ed. IT faculty. The five “specialty” courses are central or core to delivering technology-based instructional solutions in academe, healthcare, government, and business. Method of Delivery: Online	No new resources required for the certificate. The certificate will increase enrollment in existing courses.		

Institution Name: **Idaho State University**

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
Interprofessional Certificate in Mindful Practice	Certificate	Region V	Regional	2017-2018	Interprofessional program in Mindful Practice to prepare students for work that utilizes mindful practices in profession-specific treatment protocols. This program will be offered through traditional classroom presentation as well as an experiential component. Students can complete the 6 credit certificate in the course of their graduate or undergraduate studies, or it can be completed following graduation. Outcomes of this program will be a workforce more prepared to meet the physical and psychological needs of their clinical population, as well as a workforce that is more resilient and less prone to professional burnout. Method of Delivery: Face-to-face	Reallocation of multiple departmental resources		
Nondestructive Testing Technology	BTC, ITC, ATC	Region V	Regional	2017-2018	Nondestructive Testing (NDT) technology provides instruction in a type of quality control inspection that does not harm the part being tested. NDT inspectors use sophisticated technology to look through steel and concrete to identify and diagnose flaws without disrupting the integrity of the structure. Certified NDT Technicians perform inspections in power plants, pipelines, refineries, as well as on airplanes, ships, bridges, oil rigs, pressure vessels and other critical structures. Method of Delivery: Face-to-face	Reallocation of Resources		
Paramedic Science Academic Certificate	Certificate	Regions III, IV, V, and VI	Regional	2017-2018	The objective of the Paramedic Science Program is to prepare Emergency Medical Technicians to become Paramedics and provide them the opportunity to attain an Academic Certificate. This certificate will provide employment and additional education opportunities for students to become registered, certified paramedics and work in the paramedic field in Idaho as well as other states. The Academic Certificate provides a pathway for students to earn an Associate's degree or Bachelor's degree in the future. Method of Delivery Distance Learning/ On-line	Professional fees		

Institution Name: **Idaho State University**

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
Physical Therapy	Doctor of Physical Therapy (DPT)	Region III	Statewide	2017-2018	The Doctor of Physical Therapy (DPT) program in Meridian will be a "mirror" program expansion of the existing, fully accredited ISU DPT program. The DPT degree will be offered to a cohort of students at the ISU Meridian Center in addition to the cohort at ISU main campus in Pocatello. Method of Delivery: Hybrid	New budget requests, grants, and student professional fees will be used to support the expansion of the DPT Program to the Meridian campus.		
Polytechnic Institute	Not Applicable as the Polytechnic Institute is not a degree program	Regions V and VI	Regional	2017-2018	A Polytechnic Institute as proposed by ISU is an overarching structure that will allow Idaho's higher education institutions, which are members of CAES (Center for Advanced Energy Studies), to locate faculty in Idaho Falls and offer certificate and degree programs either as a single institution or jointly with other member institutions. The institute is responsive to the recommendations of the LINE (Leadership In Nuclear Energy) Commission where a polytechnic institution is recommended for Idaho Falls as part of a strategy to insure that INL (Idaho National Laboratory) maintains its status as DOE's (Department of Energy) lead laboratory for nuclear energy in the United States.	Resource neutral	ISU will be the managing institution for the Polytechnic Institute consistent with its current role for University Place, which includes CAES. An academic governance structure that handles the intricacies of multiple institutions offering degrees, both independently and collaboratively, will be developed as institutions identify programs to deliver through the overarching structure of the Polytechnic Institute. It is expected that each institution will have representation commensurate with their role, in a fashion that ensures a winning relationship for all involved. Input from INL and potentially other relevant industry partners will shape the governance structure.	
Public Health Graduate Certificate	Graduate Certificate	Regions IV, V	Regional	2017-2018	The Public Health Graduate Certificate will focus on the key disciplines in public health – epidemiology, biostatistics, health behavior, occupational/environmental health, and health policy and planning. The certificate is designed for those interested in learning more about public health or who are considering entrance in to the MPH Program at ISU. Method of Delivery: On-line	Reallocation of resources		

Institution Name: **Idaho State University**

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
Social Work	MSW	Region V, VI	Statewide shared with BSU for Regions V & VI	2017-2018	The master's degree in Social Work will build upon a highly successful undergraduate Social Work program that currently prepares students to work as professionals in entry-level social work generalist practice. Will prepare graduates for advanced professional practice in an area of concentration within the field of social work through mastery of a core set of competencies as set forth by the Council on Social Work Education (CSWE), our national accrediting body. Two options for the MSW degree would be offered: 1) a one-year, advanced standing MSW program which would be an efficient graduate education option for those students who complete their BA degrees in social work at ISU or another CSWE accredited programs; 2) a traditional two-year program for students who have completed non-social work BA degrees. The master's degree will provide an in-depth, specialized approach to Social Work practice and theory, with an emphasis on ISU program strengths in gerontology, child welfare, social work and health, and rural social problems. Method of Delivery: Hybrid/ combination	Professional fees, new operating funds		
Master of Taxation	MTax	Regions IV, V, VI	Regional	2017-2018	The Master of Taxation degree that will complement ISU's undergraduate and graduate accounting programs. This program will meet the needs of accounting graduates in gaining an in-depth knowledge of federal tax matters and related accounting and business issues. Tax accountants must be able to identify tax-related issues faced by taxpayers and apply statutes and regulations to resolve such issues. Tax accountants must also know how to research particular tax issues and how to communicate and work effectively with lawyers and business people. Method of Delivery: Traditional/Hybrid/Online	Reallocation of resources, new budget requests		

Institution Name: **Idaho State University**

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
Program offerings commencing 2018-2019								
Audiology Assistant Program	Associate of Sciences	Region V	Regional	2018-2019	Two year Associate Degree Program to prepare students to be employed in hearing aid dispensing practices, assisting Audiologists in client care. This will be a hybrid program of online and onsite classes with supervised clinical observations and experiences in local hearing aid practices. Method of Delivery: Hybrid	Reallocation of departmental resources and re-purposing of current AuD curriculum content to be appropriate for the AS level of instruction		
Biomedical Ethics	Undergraduate Certificate Graduate Certificate	Regions V	Regional	2018-2019	Certificate program of 15 credits would address the ethical issues raised by technological advances and cultural changes. It would involve relevant courses already offered in philosophy, medical anthropology, and sociology. Only two new courses will need to be created. Method of Delivery: classroom, DL and online	Reallocation		
Degree Completion Program -Dental Hygiene	Bachelor of Sciences	Region III, V	Statewide	2018-2019	The degree completion program is designed for licensed dental hygienists who have completed professional education, earned an associate's degree and are currently licensed. The degree awarded through this proposed completion program will a baccalaureate degree in dental hygiene. The ISU dental hygiene undergraduate program is the only program in the state that awards a Bachelor of Science degree in Dental Hygiene. Method of Delivery: Online and video conferencing	Student Professional Fees		

Institution Name: **Idaho State University**

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
Dental Hygiene (expansion of Bachelor of Science degree to Meridian)	Bachelor of Sciences	Region III	Statewide	2018-2019	The BS in Dental Hygiene program in Meridian will be a program expansion of the existing, fully accredited ISU Dental Hygiene program. This request is for the expansion of Idaho State University's Dental Hygiene (DH) program, including clinic and laboratory education to the ISU-Meridian campus in Meridian, Idaho. Space (4,800 square feet) has been allocated for the Dental Hygiene Program adjacent to the Idaho Advanced Education in General Dentistry Residency. Method of Delivery: DL and classroom	New Budget Request		
Dietetic Internship with Combined Master's Program and/or Health Education	Masters	Region III	Regional	2018-2019	Dietetic Internship is open to graduates nationwide who have completed a prescribed course of study in foods and nutrition, called the Didactic Program in Dietetics (DPD), accredited by the Academy of Nutrition and Dietetics. The Dietetic Internship would partner with an existing graduate program (e.g. Master of Public Health or Master of Health Education) to offer a combined internship/master's program. Existing graduate programs could possibly have a nutrition track or emphasis in addition to already offered emphasis areas for dietetic interns to choose from. Method of Delivery: Online or classroom	Professional fees from the dietetic internship along with reallocation of funds will be used to pay for this program. No new money requests are expected at this time.		
Esthetics	BTC, ITC	Region V	Regional	2018-2019	This program will train skincare specialist to evaluate clients' skin condition and appearance, discuss treatments and products for skin quality improvement, remove hair through wax or laser treatment, apply makeup, and other cosmetic procedures related to esthetics. Graduates of the program must pass a state exam for licensure. Method of Delivery: Face-to-face	Reallocation of Resources		

Institution Name: **Idaho State University**

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
Certificate in Healthcare Management	Certificate	Regions IV, V, VI	Regional	2018-2019	Three course, 9 credit, interdisciplinary certificate directed to clinical (non-administrative) students in the Division of Health Sciences. The healthcare management certificate will include coursework covering such areas as healthcare leadership, operations and quality, informatics, planning and marketing, personnel management, health law and ethics, and population health. This certificate will prepare health professions students to step into supervisory roles within the healthcare system. A graduate and an undergraduate certificate will be available. Method of Delivery: Hybrid	Reallocation of existing resources		
Health Care Quality Improvement Certificate	Certificate	Regions IV, V and VI	Regional	2018-2019	Program will be an 8-credit certificate program in quality improvement science with two courses and an inter-professional internship for completion of a project. The two didactic courses will be delivered with online instruction. In addition, a similar continuing education program will be marketed to the wider health care community. Method of Delivery: Online, plus an interprofessional internship	Existing faculty members have committed to teach the program. The program will generate a modest amount of revenue and will be self-sufficient.		

Institution Name: **Idaho State University**

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
Graduate Program in Nuclear Medicine	Ph.D.	Regions IV, V, VI	Regional	2018-2019	The Ph.D. program in nuclear medicine at ISU will prepare students for careers in the fields of diagnostic imaging, radiologic science, nuclear medicine therapy or university level research. The ISU program will draw on established strengths at ISU in the disciplines of Physics, Health Physics, Nuclear Engineering, Electrical Engineering, Chemistry, Biomedical and Pharmaceutical Sciences, and Biological Sciences to develop a curriculum that will be unique and market-directed. Students in medical degree programs may also pursue the PhD program as a supplement to their medical education, after which they will be well prepared to enter residency programs and practice as a physician specializing in medical imaging, diagnostics and/or radiation therapy/oncology. Doctoral candidates will study – among other related disciplines – radiation biology, medical diagnostics, ultrasound technology, magnetic resonance imaging (MRI) and radiation safety. A strong emphasis in this dissertation-based program will be the development of research skills and the promotion of cutting-edge scholarship. Method of Delivery: Mixed didactic, research and dissertation	Re-allocation of existing resources as well as new resources in a few areas identified as required but not currently existing.		
Master of Occupational Therapy (Expansion to Meridian)	Master of Occupational Therapy (MOT)	Region III	Statewide	2018-2019	The Master of Occupational Therapy (MOT) program in Meridian will be an extension program of the existing, fully accredited ISU MOT program. The MOT degree will be offered to a cohort of students at the ISU Meridian Center in addition to the cohort at ISU main campus in Pocatello. Method of Delivery: Hybrid	New budget requests, grants, and student professional fees will be used to support the expansion.		

Institution Name: **Idaho State University**

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
Rehabilitation and Communication Sciences	Ph.D.	Region III & V	Regional	2018-2019	This proposed doctoral program would provide an interdisciplinary academic and research experience designed to build the skills and abilities to enter and succeed in academic faculty positions in the rehabilitation and communication sciences fields. Currently there is a shortage of rehabilitation and communication sciences professionals and a critical shortage of qualified faculty members to teach in entry-level clinical programs and conduct research. This PhD program would be ideally suited for current physical therapists, occupational therapists, speech-language pathologists, and audiologists to advance their knowledge, pursue a line of research, and develop their teaching abilities within an interprofessional context. Method of Delivery: Hybrid traditional and online	Reallocation of existing resources and grant funds will be sought to support this degree program.		
Respiratory Therapy	transition from AAS to BS	Region V	Regional	2018-2019	This program provides instruction for respiratory therapy students to administer respiratory care and life support to patients with deficiencies and abnormalities of the cardiopulmonary system. Graduates of the program will have the ability to accurately assess patients, determine appropriate methods of therapies, set up and operate respiratory equipment, monitor patient response to various treatment modalities, perform pulmonary function testing, and assist patients with breathing maneuvers. Method of Delivery: Hybrid/ Combination	Reallocation		
Degree Completion for Sign Language Interpreting	BS	Region III	Statewide	2018-2019	Completion program would give appropriate experiential credit to individuals already working as sign language interpreters. Didactic and skill courses will allow earned B.S. degree in about 2 years. We anticipate interpreters will be licensed in Idaho by the fall of 2018, and demand for this program will be high. Method of Delivery: Face-to-face	Existing resources and professional fee		

Institution Name: **Idaho State University**

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
Speech Language Pathology MS Program - expansion to Magic Valley	MS	Region IV	Statewide	2018-2019	This is an expansion of the MS in Speech Pathology to Region IV. It will be a hybrid program, using live instruction, online courses, and directed clinical teaching designed to provide access to students living in the Magic Valley region. The leveling pre-requisite courses plus the 60-credit Master's degree program would be offered. Method of Delivery: Hybrid - online and face-to-face	Existing resources		
Program offerings commencing 2019-2020								
Biochemistry	MS	Region V	Regional	2019-2020	The degree awarded will be a MS in Biochemistry, which is the study of chemical processes within living organisms. ISU's program will be housed in Chemistry. As a discipline, Biochemistry provides the basis for practical advances in medicine and health technology. Method of Delivery: Traditional Classroom	Reallocation of Resources and grant funding		
Computer Engineering	BS	Region V	Regional	2019-2020	Faculty within the Department of Electrical Engineering believes that there is an unsatiated demand for a BS program in Computer Engineering. It is believed that a BS program in Computer Engineering could be developed using existing courses with an optimized program structure without any additional expense. Method of Delivery: hybrid	Reallocation of Resources		
Integrative Neuroscience	MS, Ph.D.	Region V	Regional	2019-2020	This degree program will be a MS, Ph.D. in Integrative Neuroscience combining the academic resources of the three colleges and eight departments. The program will have a solid grounding in neurobiology and emphases developed within the students own department. Method of Delivery: Traditional Classroom	Grant Funding		

Institution Name: **Idaho State University**

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
Mathematics	MS	Region V	Regional	2019-2020	Regionally there is a unsatiated demand for graduate students trained in statistics. Students of statistics programs are finding very high paying jobs immediately upon graduation. We believe developing a graduate MS in statistics will serve the region well. Method of Delivery: Hybrid	Reallocation of Resources		
Doctor of Nursing Practice (DNP)/Doctor of Philosophy (PhD) in a Nursing dual degree	DNP/PHD	Region V	Statewide	2019-2020	The dual degree of DNP/Ph.D. will encompass an integrated curriculum of existing DNP and Ph.D. programs for an advanced clinical and research program of study. The graduate will be prepared as an expert and leader in primary care practice, and to contribute to the development of scientific knowledge for advancing the discipline. The dual degree program will be delivered online; students could enroll from across the U.S (KN 05-22-15) Method of Delivery: Online	No additional resources requested. Professional fees would be assessed as currently established for graduate programs each semester the student is enrolled.		
Radiographic Science Sonography Certificate	Certificate	Region V	Regional	2019-2020	This certificate program will be targeted to ISU radiographic science graduates who want to stay in the local area while seeking education in sonography, a sought-after skill. The program would last 3 consecutive semesters starting with the fall semester and would be approximately 35 credits. Didactic courses would cover topics such as sonographic physics and instrumentation, sectional anatomy, clinical safety, quality assurance, and alternate/new technologies and modalities. Students would complete approximately 1050 hours of clinical experience. This certificate program would meet the ARMDS requirements for registration. Method of Delivery: Hybrid (face-to-face and online)	New Budget Request Professional Fees		

Institution Name: **Idaho State University**

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
Rehabilitation Counseling	Masters (MCOUN)	Regions IV, V, VI	Regional	2019-2020	Rehabilitation counseling is a systematic process which assists persons with physical, mental, developmental, cognitive, and emotional disabilities to achieve their personal, career, and independent living goals through the application of the counseling process involving communication, goal setting, and beneficial growth or change through self-advocacy, psychological, vocational, social, and behavioral interventions. Method of Delivery: face-to-face	New Budget Request Professional Fees		
Program offerings commencing 2020-2021								
Physician Assistant Residency, Psychiatry	MPAS-Psychiatry	Region V	Statewide	2020-2021	This request is to initiate a new post-graduate residency culminating in a graduate degree within the existing Department of Physician Assistant Studies. The degree will be the “Masters of Physician Assistant Studies with an emphasis in Psychiatry” (MPAS-Psychiatry). The P.A. program provides a quality graduate medical education that emphasizes critical thinking, problem solving, and service-learning in a curriculum that is technologically enhanced, research oriented, and evidence-based, with strength in both the basic and clinical medical sciences. Method of Delivery: classroom, DL and onsite clinical	Partnerships		
Radiographic Science AS to BS Completion Program	Bachelor of Sciences	Region V	Regional	2020-2021	This program would be a bridge to allow working technologists with an AS degree to complete a BS degree online. Currently the standard for radiographers is an AS degree, so having a BS degree would make a radiographer more valuable and poised to step into leadership positions in a clinical environment. Online course delivery would allow technologists from anywhere in the world to work while pursuing this degree. Delivery: On-line	New Budget Request and Professional Fees		

FIVE-YEAR PLAN
Proposed Regional Programs

Institution Name: Boise State University

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
Program offerings commencing 2016-2017								
Bachelor of Applied Science	BAS	Boise/Region III	Regional	Fall 2016	Expansion of existing program to online degree option. The Bachelor of Applied Science gives students the opportunity to apply 40 credits of technical education to a bachelor's degree and allows you to build a degree plan that focuses on a student's academic goals. Online Method of Delivery.	Self-support; part of existing program.		Board approved June 2016
Biomolecular Sciences	MS	Boise/Region III	Regional	Fall 2016	A Master's in Science program that offers students the opportunity to combine studies from traditional areas of science to solve important problems that transcend boundaries between the single disciplines of biology, chemistry, physics, and computer science. The program will offer students training to conduct basic research in biotechnology and biomolecular sciences. Additionally, there will be a 4+1 option to accompany the preexisting undergraduate degree in Biophysics. Traditional Method of Delivery.	Reallocation if resources are necessary		Board approved June 2016

Institution Name: Boise State University

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
Computing	PhD	Boise/Region III	Regional	Fall 2016	This program will have three tracks: Computer Science, Cybersecurity, and Computational Science and Engineering. The program will contribute to Idaho's and Boise State's goals for education, research, and economic growth. It will: • Transform Boise State's Computer Science and related disciplines into one of the reputable research programs in the northwest. • Build research and education capacity for solving complex interdisciplinary problems in the areas of cyber security and computational science & engineering, as well as other research areas involving computer science, such as artificial intelligence, data analytics, social media, computer interface design, graphics, and others. • Provide a research and development base for high-tech companies in the state, as well as professional advancement opportunities for government laboratories and agencies, non-government organizations, and educational institutions. Traditional Method of Delivery	Line Item Request; reallocation as necessary		Board approved June 2016
Educational Games and Simulation	Graduate Certificate	Boise/Region III	Regional	Fall 2016	• Analyze recent research and best practices for effective teaching and learning with educational games and with simulations in virtual worlds. • Design, teach, and evaluate teaching and learning activities in virtual worlds. • Identify entertaining elements in games, cartoons, and other venues, and synthesize them into educational games and activities to improve student engagement in • Design 2-D and 3-D games for learning and test them for educational effectiveness. Online Method of Delivery	Self support; part of existing program.		In progress-August 2016

Institution Name: Boise State University

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
Educational Technology	EdS	Boise/Region III	Regional	Fall 2016	Students in the program of Educational Technology will explore the use of current and emerging technologies for effective and efficient teaching in a dynamic global society. Areas of focus include but are not limited to online teaching and learning, technology integration, and innovative teaching in K-12 and higher education. Online Method of Delivery	Self-support		Board approved in April 2016
Program offerings commencing 2017-2018								
Accountancy	MS	Boise/Region III	Regional	Fall 2017	Existing program will add online degree option. The Master of Science in Accountancy is designed to prepare candidates for a career within the broader framework of business decision making. The primary role of the program is to prepare students for careers in public accounting as Certified Public Accountants (CPAs). Online Method of Delivery.	Likely will use online fee model		
Applied Anthropology	BA	Boise/Region III	Regional	Fall 2017	Applied anthropology applies anthropological theories and practices to the needs of private and public sector organizations. Current research initiatives in the field tend to be concentrated in (1) marketing and consumer behavior, (2) organizational theory and culture, and (3) international business, especially international marketing, intercultural management, and intercultural communication. We define business anthropology as a practical oriented scholastic field in which business anthropologists apply anthropological theories and methods to identify and solve real problems in everyday life. Online Method of Delivery	Likely will use online fee model		
Basque Studies	Graduate Certificate	Boise/Region III	Regional	Fall 2017	The Graduate Certificate in Basque Studies is designed for a student to advance their knowledge about the Basque people, culture, language, politics and homeland. Traditional Method of Delivery.	Reallocation if resources are necessary.		

Institution Name: Boise State University

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
Big Data Analytics	Graduate Certificate	Boise/Region III	Regional	Fall 2017	A program that focuses on the application of statistical modeling, data warehousing, data mining, programming, forecasting and operations research techniques to the analysis of problems of business organization and performance. Includes instruction in optimization theory and mathematical techniques, data mining, data warehousing, stochastic and dynamic modeling, operations analysis, and the design and testing of prototype systems and evaluation models. Traditional Method of Delivery	Reallocation if resources are necessary		
Big Data Analytics	MS	Boise/Region III	Regional	Fall 2017	A program that focuses on the application of statistical modeling, data warehousing, data mining, programming, forecasting and operations research techniques to the analysis of problems of business organization and performance. Includes instruction in optimization theory and mathematical techniques, data mining, data warehousing, stochastic and dynamic modeling, operations analysis, and the design and testing of prototype systems and evaluation models. Traditional Method of Delivery	Reallocation if resources are necessary		
Corrosion Engineering	Graduate Certificate	Boise/Region III	Regional	Fall 2017	A graduate certificate in Corrosion Engineering will assist engineers in doing research and developing new methods, structures and materials that will lower the environmental impact on roadways, bridges, windmills, and pipelines among others. Graduates will be able to address emerging needs in a variety of industries including energy, chemical processing and pharmaceuticals. Traditional Method of Delivery.	No additional cost to offer program		

Institution Name: Boise State University

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
Criminal Justice	BS	Nampa/Region III	Regional	Fall 2017	2+2 completion program w/CWI that prepares individuals to apply theories and practices of organization management and criminal justice to the administration of public law enforcement agencies and operations. This includes instruction in law enforcement history and theory, operational command leadership, administration of public police organizations, labor relations, incident response strategies, legal and regulatory responsibilities, budgeting, public relations, and organizational leadership. Traditional Method of Delivery	Reallocation if resources are necessary.		
Cyber Security	MS	Boise/Region III	Regional	Fall 2017	This program will prepare individuals to assess the security needs of computer and network systems, recommend safeguard solutions, and manage the implementation and maintenance of security devices, systems, and procedures. Includes instruction in computer architecture, programming, and systems analysis; networking; telecommunications; cryptography; security system design; applicable law and regulations; risk assessment and policy analysis; contingency planning; user access issues; investigation techniques; and troubleshooting. Traditional Method of Delivery	No additional cost to offer program		
Economics	MA	Boise/Region III	Regional	Fall 2017	This program will focus on developing quantitative and analytical skills increasingly sought by private and public sector employers as well as high quality PhD and MBA programs. Traditional Method of Delivery	Reallocation if resources are necessary.		

Institution Name: Boise State University

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
Economics	Master of Economics	Boise/Region III	Regional	Fall 2017	This program will focus on developing quantitative and analytical skills increasingly sought by private and public sector employers as well as high quality PhD and MBA programs. The program will include core courses in advanced theory and forecasting/econometrics as well as emphases in Regional Economic Development and Environmental & Resource Economics. Traditional Method of Delivery	Reallocation if resources are necessary.		
Education Studies	BA	Boise/Region III	Regional	Fall 2017	This program focuses on the general theory and practice of learning and teaching, the basic principles of educational psychology, the art of teaching, the planning and administration of educational activities, school safety and health issues, and the social foundations of education. Traditional Method of Delivery	No additional cost to offer program		
Electrical and Computer Engineering: In development, but potential foci include computer engineering, semiconductor processing, power systems, embedded systems	Graduate Certificate (multiple)	Boise/Region III	Regional	Fall 2017	This program will provide professionals with the ability to receive graduate coursework with a focus on electrical and computer engineering; potentially in computer engineering, semiconductor processing, power systems, embedded systems Traditional Method of Delivery	No additional cost to offer program		
Energy Analysis	Graduate Certificate	Boise/Region III	Regional	Fall 2017	This program will prepare individuals to apply basic engineering principles and technical skills in support of engineers and other professionals engaged in developing energy-efficient systems or monitoring energy use. Includes instruction in principles of energy conservation, instrumentation calibration, monitoring systems and test procedures, energy loss inspection procedures, energy conservation techniques, and report preparation. Traditional Method of Delivery	No additional cost to offer program		

Institution Name: Boise State University

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
Forensic Science	BS	Boise/Region III	Regional	Fall 2017	This is a transdisciplinary program with biology, chemistry, computer science, accounting. The focus is on the application of the physical, biomedical, and social sciences and includes the analysis and evaluation of physical evidence, human testimony and criminal suspects. Also included is instruction in forensic medicine, forensic dentistry, anthropology, psychology, entomology, pathology, forensic laboratory technology and autopsy procedures, DNA and blood pattern analysis, crime scene analysis, crime scene photography, fingerprint technology, document analysis, witness and suspect examination procedures, applicable law and regulations, and professional standards and ethics. Traditional Method of Delivery	Reallocation if additional resources are necessary.		
General Business	BBA	Boise/Region III	Regional	Fall 2017	Existing program will add online degree option. The BBA in General Business provides a broad-based curriculum and is designed for students who do not wish to specialize in any single area of business. Online Method of Delivery	Likely will use online fee model		
General Engineering	BS	Boise/Region III	Regional	Fall 2017	A broad degree covering all aspects of engineering. Traditional Method of Delivery	Reallocation if resources are necessary.		
Materials Characterization	Graduate Certificate	Boise/Region III	Regional	Fall 2017	A graduate certificate in Materials Characterization will help engineers and scientists expand their knowledge of characterization techniques, and introduce them to new methods for evaluation. Traditional Method of Delivery.	No additional cost to offer program		
Materials Science: In development, but potential foci include biomaterials, computational materials, nuclear materials, functional materials, nano-materials	Graduate Certificate (multiple)	Boise/Region III	Regional	Fall 2017	This program will provide professionals with the ability to receive graduate coursework with a focus on materials; potentially in biomaterials, computational materials, nuclear materials, functional materials, nano-materials Traditional Method of Delivery	No additional cost to offer program		

Institution Name: Boise State University

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
Musical Theatre	BA	Boise/Region III	Regional	Fall 2017	This program will focus on the principles and techniques for integrating theatre, music, and dance into a unified production. Includes instruction in acting, dance, voice, technical theater, musical genres, piano, and history of musical theater. Traditional Method of Delivery	Reallocation if resources are necessary.		
Nonprofit Management	BA	Boise/Region III	Regional	Fall 2017	This undergraduate program will prepare individuals to manage the business affairs of non-profit corporations, including foundations, educational institutions, associations, and other such organizations. Includes instruction in business management, principles of public administration, principles of accounting and financial management, human resources management, taxation of non-profit organizations, and business law as applied to non-profit organizations. Traditional Method of Delivery	Reallocation if resources are necessary.		
Nursing Simulation	MS	Boise/Region III	Regional	Fall 2017	The program will prepare healthcare educators to facilitate learning of health professions students and practitioners in a simulation lab environment. A health care simulation lab is a physical location that replicates the settings where health care may be provided such as a hospital, provider's office, or home. The lab is designed with features to mimic real health care settings, and includes functioning equipment. Both live actors and computerized mannequins offer opportunities for learners to provide patient care experiences. The advantage that simulation offers is that the student experience can be better directed, poses less risk to live patients, and includes a broader array of health care situations. Traditional Method of Delivery	Reallocation if resources are necessary.		

Institution Name: Boise State University

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
Urban Studies	BA/BS	Boise/Regional III	Regional	Fall 2017	This program will focus on conceptual and analytical frameworks and specialized skills needed for professions focused on urban change or development in public agencies or private business, or for graduate study in urban planning, law, social welfare, public affairs, or the social and environmental sciences. Traditional Method of Delivery.	Reallocation if resources are necessary.		
Program offerings commencing 2018-2019								
Applied Physics	MS	Boise/Region III	Regional	Fall 2018	This M.S. program provides the students with an opportunity to broaden and to intensify their knowledge in a number of interdisciplinary areas of Physics such as Computational Physics, Biophysics, and Materials Physics. The graduate program is intended to provide the sound scientific foundation for careers in research, teaching, and industry. Traditional Method of Delivery	Reallocation if resources are necessary		
Asian Studies	BA	Boise/Region III	Regional	Fall 2018	Will include intensive language study, a study abroad experience in Asia, and a comprehensive historical/economic understanding of Asian societies. Excellent preparation for a number of professional opportunities in the fields of business, law, and international relations. Professional schools and careers are focusing increasingly on interdisciplinary preparation of applicants. Traditional Method of Delivery	Reallocation if resources are necessary		
Bioinformatics (Joint Program between BSU and ISU)	BS/MS	Boise/Region III Pocatello/Region V	Regional	Fall 2018	This will be a 5-year program offered jointly by ISU & BSU, with participation from UI. Students will join the program as Juniors or Seniors, earn a B.S. in biology, computer science, mathematics, biochemistry, etc. The 5th (graduate) year will be devoted primarily to research experience and three program-specific courses. Traditional and Online Method of Delivery	Reallocation if resources are necessary.		

Institution Name: Boise State University

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
Biomedical Engineering	MS and MEng	Boise/Region III	Regional	Fall 2018	The proposed degree programs will prepare students for engineering careers in the biomedical and allied health fields or PhD programs in biomedical engineering. The degrees are interdisciplinary and build on Boise State's strengths in biomechanics, biomaterials and nanomaterials research, instrumentation, and sports medicine. Traditional Method of Delivery	Reallocation resources are necessary.		
Biomedical Sciences	BS	Boise/Region III	Regional	Fall 2018	The BS in Biomedical Sciences will prepare a student for: (i) most health professional schools, e.g., medical, dental, veterinary, physical therapy, physician assistant, and pharmacy, and (ii) research-based M.S. and Ph.D. degrees in cell biology, molecular biology, immunology, and other biomedical sciences, or (iii) careers in industry (e.g., pharmaceutical, biotech). Traditional Method of Delivery	No additional cost to offer program		
Chemistry	MA	Boise/Region III	Regional	Fall 2018	A master's program in chemistry focused on professionals and secondary teachers; a non-thesis alternative to existing MS in Chemistry. Traditional Method of Delivery	No additional cost to offer program		
Digital Literacy	MA	Boise/Region III	Regional	Fall 2018	This program will focus on the change in how information is processed, delivered, and received in today's highly connected world. Traditional Method of Delivery	Reallocation if resources are necessary		
GIS	Graduate Certificate	Boise/Regional III	Regional	Fall 2018	Existing program, will add online option. A graduate certificate in Geographic Information Systems provides students with the knowledge to pursue opportunities in the expanding field of spatial data and systems. The program will also provide professional certification. Online Method of Delivery.	Likely will use online fee model		

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Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
Global Studies	BA	Boise/Region III	Regional	Fall 2018	A program rooted in social sciences, economics, and humanities that would prepare students for careers with an international orientation including law, policy, nonprofit management and development, communications, and education. Traditional Method of Delivery	Reallocation if resources are necessary		
Legal Studies	BA	Boise/Region III	Regional	Fall 2018	The program will prepare individuals to perform research, drafting, investigatory, record-keeping and related administrative functions under the supervision of an attorney or court. Includes instruction in legal research, drafting legal documents, appraising, pleading, courthouse procedures, and legal specializations. Traditional Method of Delivery	Reallocation if resources are necessary.		
Radiologic Sciences	BS	Boise/Regional III	Regional	Fall 2018	Existing program, will add online degree option. Graduates will be awarded a Bachelor of Science degree and qualify for the American Registry of Radiologic Technologist credentialing exam. The online degree will be an option only for students in the Computed Tomography, Magnetic Resonance Imaging, and Diagnostic Medical Sonography emphases. Online Delivery Method.	Likely will use online fee model		
Secondary Education	BA	Boise/Region III	Regional	Fall 2018	This program will prepare individuals to teach students in the secondary grades, which may include grades seven through twelve, depending on the school system or state regulations. Students will also pursue a subject area major field. Traditional Method of Delivery	No additional cost to offer program		
Spanish	MA	Boise/Region III	Regional	Fall 2018	This program focuses on the Spanish language and related dialects. Includes instruction in philology; Modern Castillan; Latin American and regional Spanish dialects; and applications in business, science/technology, and other settings. Traditional Method of Delivery	Reallocation if resources are necessary.		

Institution Name: Boise State University

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
STEM Secondary Education	BA	Boise/Region III	Regional	Fall 2018	This program will prepare individuals to teach general science programs, or a combination of the biological and physical science subject matter areas, at various educational levels. Traditional Method of Delivery	No additional cost to offer program		
TESOL (Teachers of English to Speakers of Other Languages) and Applied Linguistics	MA	Boise/Region III	Regional	Fall 2018	The program will offer courses in applied linguistics, second language acquisition theory, and pedagogical strategies for teaching second language learners of English, primarily those who are not in U.S. K-12 educational settings (e.g., adult refugees and immigrants in Idaho and learners of English as an additional language in non-English-dominant countries). Traditional Method of Delivery	Reallocation if resources are necessary.		
Teaching Writing Online	Graduate Certificate	Boise/Region III	Regional	Fall 2018	The program will provide secondary and post-secondary instructors both theory and practice in course design, communication, and assessment in online writing instruction. Emphasis is on innovation and applied research through inquiry-based teaching and learning. It will be the first program nationally with this focus at the secondary and post-secondary levels. Online Method of Delivery	Self-support		
Victimology	MS	Boise/Region III	Regional	Fall 2018	The Master of Science in Victimology would provide students with a practice-oriented program that prepares them for entry into a wide variety of positions in law enforcement, criminal justice, the courts, corrections, and victim services programs, as well as professional settings involving work with victims of crime, their families, and the community at large. Online Method of Delivery.	Reallocation if resources are necessary.		

Institution Name: Boise State University

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
Accountancy Taxation	MS	Boise/Regional III	Regional	Fall 2018	Existing program will add online degree option. Graduates of the Master of Science in Accountancy Taxation will develop technical competence and the business knowledge and expertise in the functions and limitations of revenue laws, in communicating their knowledge, and in assuring the efficiency and fairness of the tax system. Online Method of Delivery.	Likely will use online fee model		
Civil Engineering	Ph.D.	Boise/Region III	Regional	Fall 2018	The PhD program will focus on advanced theory and research in various facets of the profession with an emphasis on environmental research. Traditional Method of Delivery	Reallocation if resources are necessary.		
Local Governance and Public Engagement	BA	Boise/Regional III	Regional	Fall 2018	The BA in Local Governance and Public Engagement is focused on applying collaborative governance theory and practice to real world, community-based problems. Study of inclusive planning, transparency, authentic intent, breadth of participation, informed participation, accessible participation, appropriate process and evaluation will be integral points of study. Traditional Method of Delivery.	Reallocation if resources are necessary.		
Dramatic Writing	MFA	Boise/Region III	Regional	Fall 2018	A studio-based, experiential program to develop playwrights and screenwriters. Focused on advanced technical skills in dramatic construction; integration of elements of theatrical production in the development of scripts; use of theories and methods of script analysis, criticism, and dramaturgy; understanding of how theatre history and theory influence the creative process. Traditional Method of Delivery	Reallocation if resources are necessary.		

Institution Name: Boise State University

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
Economic and Community Development	BA	Boise/Regional III	Regional	Fall 2018	A BA in Economic and Community Development will prepare students to works in the fields of economic development and community development. Students will learn about the democratic values of local empowerment for social change and the importance of community and economic development practitioners to facilitate and promote community empowerment through collaborative practices. Traditional Method of Delivery.	Reallocation if resources are necessary		
Engineering Management	MENGR	Boise/Region III	Regional	Fall 2018	The Master of Engineering Management will provide students with the skills and knowledge to lead technical organizations and projects effectively. Students will be more prepared to move into an engineering management position with an engineering company or more technically intensive role in a business environment. Online Method of Delivery.	Reallocation if resources are necessary		
General Business--Engineering Major	BBA	Boise/Region III	Regional	Fall 2018	The General Business--Engineering Major will be geared to engineering-related majors who need essential business background to more effectively operate in a business. Accounting, finance, human resources, marketing, and supply chain courses are among the key elements to this program. Traditional Method of Delivery	Reallocation if resources are necessary.		
Human-Environment Systems	MS	Boise/Region III	Regional	Fall 2018	The Masters in Science in Human-Environment Systems will provide students an opportunity to explore and study the systems in which natural and societal dynamics influence productivity and sustainability. Traditional Method of Delivery.	Reallocation if resources are necessary		

Institution Name: Boise State University

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
Joint Master of Public Administration and Juris Doctor (Joint program between BSU and UI)	MPA/JD	Boise/Region III Moscow/Region I	Regional	Fall 2018	The joint MPA/JD program would allow students to combine the study of law and the study of public affairs. The program will prepare students to substantively connect the law and government in our society and our world. Students will be well-equipped to assume positions of leadership not only in law and in government, but also in policy organizations, non-governmental organizations, and other organizations of influence. Traditional Method of Delivery.	No additional cost to offer program		
Liberal Arts	MLA	Boise/Regional III	Regional	Fall 2018	The Master in Liberal Arts will provide students with coursework and study in the fields of behavioral science, humanities, natural sciences and social sciences. The degree is designed to produce students who are able to explore issues both critically and contextually. Traditional Method of Delivery.	Reallocation if resources are necessary		
Master of Athletic Training	Master of Athletic Training	Boise/Region III	Regional	Summer 2018	This program will prepare individuals to apply business, coaching and physical education principles to the organization, administration and management of athletic programs and teams, fitness/rehabilitation facilities and health clubs, sport recreation services, and related services. Includes instruction in program planning and development; business and financial management principles; sales, marketing and recruitment; event promotion, scheduling and management; facilities management; public relations; legal aspects of sports; and applicable health and safety standards. Traditional Method of Delivery	Reallocation if resources are necessary.		

Institution Name: Boise State University

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
Master of Public Administration	MPA	Boise/Regional III	Regional	Fall 2018	Existing program will add online degree option. This degree is focused on public and nonprofit management, and is designed for pre-service students and in-service professionals for positions of leadership in public service. Online Method of Delivery.	Likely will use online fee model		
Nonprofit Administration	Master	Boise/Region III	Regional	Fall 2018	The Master of Nonprofit Administration provides students with the competencies to provide leadership, identify ethical considerations and effect positive change. These skills are suited for students looking to positions as executive directors, development directors, or program/service leaders at nonprofits ranging from the humanities, education, and religion to health, human services, and social change-oriented missions. Traditional Method of Delivery.	Reallocation if resources are necessary.		
Play Therapy	Graduate Certificate	Boise/Region III	Regional	Fall 2018	This program will provide current students and professionals in the community with the training and education needed to learn how to counsel children through developmentally-responsive and research-based play therapy methods. Coursework will help students gain hours toward earning their Registered Play Therapist (RPT) credential. Traditional Method of Delivery	Reallocation if resources are necessary		
Political Communication	BA	Boise/Regional III	Regional	Fall 2018	The BA in Political Communication will allow students to explore the rapidly growing media environment and how the political climate affects it and can shape it. The program will also focus on the constant evolution of the internet, mass media, and communication technologies and how they are changing the nature of politics both in the U.S. and abroad. Traditional Method of Delivery.	Reallocation if resources are necessary		

Institution Name: Boise State University

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
Public Policy	BA	Boise/Regional III	Regional	Fall 2018	The BA in Public Policy will provide students with a course of study that looks at the policy world through the lens of politics, analysis, and implementation. Traditional Method of Delivery.	Reallocation if resources are necessary.		
Sustainable Development	BA	Boise/Regional III	Regional	Fall 2018	The BA in Sustainable Development will provide students the skills to address complex social, environmental and economic issues, such as climate change, biodiversity loss, social inequities, water and food scarcity. Traditional Method of Delivery.	Reallocation if resources are necessary.		
Video and Film Production	BA	Boise/Region III	Regional	Fall 2018	The BA in Video and Film Production will provide students with a strong foundation in film production, including the conceptual development, pre-production planning, proposal writing, script writing, shooting on set and on location and editing. Traditional Method of Delivery.	Reallocation if resources are necessary.		
Program offerings commencing 2019-2020								
Health Informatics	BS degree completion	Boise/Region III	Regional	Fall 2019	A degree completion program that focuses on the application of computer science and software engineering to medical research and clinical information technology support, and the development of advanced imaging, database, and decision systems. Includes instruction in computer science, health information systems architecture, medical knowledge structures, medical language and image processing, quantitative medical decision modeling, imaging techniques, electronic medical records, medical research systems, clinical decision support, and informatics aspects of specific research and practice problems. Online Method of Delivery	Reallocation if resources are necessary.		

Institution Name: Boise State University

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
Public Sociology & Community Research	Graduate Certificate	Boise/Region III	Regional	Fall 2019	A program that focuses on the systematic study of human social institutions and social relationships with a focus on sociological research methods. Hybrid Method of Delivery	Reallocation if resources are necessary		
Public Sociology and Community Research	MA	Boise/Region III	Regional	Fall 2019	The program will provide training in the application of sociological theory and methodology to community research in the public interest. Students will complete the program prepared for careers in research, education and administration for the private, public and nonprofit sectors. Traditional Method of Delivery	Reallocation if resources are necessary		
STEM Education	PhD	Boise/Region III	Regional	Fall 2019	The PhD program will prepare those whose focus is on teaching and learning in the STEM disciplines. The program is interdisciplinary in nature but provides students with advanced study and research in teaching and learning methodologies targeted at education in the STEM fields. Traditional Method of Delivery	Reallocation if resources are necessary.		
Program offerings commencing 2020-2021								
Athletic Training Program Administration	PhD	Boise/Region III	Regional	Fall 2020	This program will prepare future leaders in athletic training education programs (ATP). All of the 350+ such programs in the US must have a designated Program Director with an academic affiliation and with board certification as an athletic trainer. Presently there are no known doctoral level programs of this type. Combination of online and traditional method of delivery	Reallocation if resources are necessary.		
Human-Environment Systems	BS	Boise/Region III	Regional	Fall 2020	The BS in Human-Environment Systems provides students with a strong foundation of knowledge and understanding of the complex interface between society and the natural environment. Students are engaged in an innovative education that encompasses the fields of biology, anthropology, geosciences, and public policy. Traditional Method of Delivery.	Reallocation if resources are necessary		

Institution Name: Boise State University

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
Respiratory Care	MS	Boise/Region III	Regional	Fall 2020	The Master of Science in Respiratory Care will advance practicing respiratory therapists clinical and technical knowledge and provide the ability for continued scholarly pursuit within the discipline of respiratory care. Traditional and Online Method of Delivery.	Reallocation if resources are necessary		
Program offerings commencing 2021-2022								
Environmental and Occupational Health	MS	Boise/Region III	Regional	Fall 2021	The Master of Science in Environmental and Occupational Health is a program designed for students seeking careers as environmental and/or occupational health professionals. The program will emphasize the recognition, evaluation and control of environmental and occupational factors affecting health and build student knowledge of economic, sociopolitical, and regulatory issues. Traditional Method of Delivery.	Reallocation if resources are necessary		
American Sign Language	BA	Boise/Region III	Regional	Fall 2021	The Bachelor of Arts in American Sign Language enables students to acquire competence in both expressive and receptive American Sign Language skills as well as familiarity with the literature and culture of the Deaf community. Traditional Method of Delivery.	Reallocation if resources are necessary		

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FIVE-YEAR PLAN
Proposed Regional Programs

Institution Name: Lewis-Clark State College

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
Program offerings commencing 2016-2017								
History	Bachelor of Arts (BA) or Bachelor of Science (BS)	Region II	Regional	Fall 2016	Renaming of existing degree which is currently titled: Social Sciences (with emphases in various areas, including History). The History degree would provide students the opportunity to examine and analyze change and continuity in human societies over time. The study of history tells us not only about the past, but provides important insights into the present and enhances our understanding of the world around us. [Hybrid delivery]	Adjunct instructor		
Instrument Mechanic	AAS	Region II	Regional	Spring 2017 or earlier if possible	This certificate prepares graduates to work in an industrial/manufacturing environment and support the mechanical processes of a plant. The classes will focus on the maintenance and troubleshooting of electronic, electrical, and pneumatic processes as it applies to manufacturing equipment.	None will be required as the courses will be drawn from existing program classes.	None	None
Maintenance Millwright	Intermediate Technical Certificate	Region II	Regional	Spring 2017 or earlier if possible	This certificate will allow student who wish to work in an industrial/manufacturing environment and support the mechanical processes of the plant. The classes will focus on the basics of fabrication, hydraulics, and blueprinting reading.	None will be required as the courses will be drawn from existing program classes.	None	None
Pharmacy Technician	Basic Certificate	Region II	Regional	Fall 2016	The Pharmacy Technician certificate is a collaborative project with North Idaho College. The new curriculum is designed to meet the accreditation requirements for the American Society of Health-System Pharmacists (ASHP). [Hybrid delivery]	No additional resources	NIC	

Institution Name: Lewis-Clark State College

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
Radiographic Science	Bachelor of Science	Region II	Regional	Fall 2016	The BS Radiographic Science degree is structured to provide Certified Radiologic Technologists the opportunity to develop additional skills required to demonstrate an advanced understanding in the healthcare profession; including but not limited to Leadership, Organization, Ethics, Community Health, Policy, Stress Management and Problem Solving. [Hybrid/ Online]	1.0 FTE Instructor		
Web Design & Development	Intermediate Technical Certificate (Web Authoring)	Region II	Regional	Fall 2016 or Spring 2017	This certificate provides a broad-based, 33-credit training program for web design. It will be piloted first in the Orofino Correctional Facility.	Cost of a server + 15 computers for the lab	Possibly with Orofino Correctional Facility and 2nd Chance PELL pilot	None
Program offerings commencing 2017-2018								
CS: Bioinformatics	BS/AS	Region II	Regional	Fall 2017	This major prepares graduates to work in the interdisciplinary field of Bioinformatics, which is focused on discovering new methods of using computers to understand the natural world. The content includes traditional biology and computer science coursework and also bioinformatics-specific content. Delivery is by lecture, laboratory sessions, on-line materials, and research	1.0 FTE Computer Science faculty	n/a	
Creative Writing	BFA	Region II	Regional	Fall 2017	This regionally unique undergraduate BFA program is a combination studio-arts & literary studies degree. It emphasizes a holistic, creative arts-centered curriculum alongside a foundation of traditional language/literary education. The BFA prepares students to be successful writers (in both creative and professional contexts) and for post-graduate studies in English, Creative Writing, and other fields. This degree will be offered in a face-to-face format.	No anticipated additional resources initially; additional adjunct depending on program growth		

Institution Name: Lewis-Clark State College

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
Dental Hygiene	Associate of Applied Science	Region II	Regional	TBD	This degree will allow local students the opportunity to enter into the Dental Health field without leaving the region for the required training. [Face-to-Face]	1.0 FTE Instructor; funds to support supervising dental hygienists and dentists {Current agreement with LCC = $55K/student]	NIC	
Graphic Communications	A.A.S. or Intermediate Technical Certificate in Packaging	Region II	Regional	Fall 2017	This degree /certificate option will allow a student to study and train in greater depth in the packaging industry. Degree requirements may come from courses in web design, electronic drafting, art, photography.	1.0 FTE faculty member who has industry experience and contacts	None	None
Interdisciplinary	A.A.S.	Region II	Regional	Fall 2017	An Interdisciplinary AAS lets the student customize a degree plan to help meet personal, academic, professional, and career goals. Two areas of concentration from CTE programs will allow the student to create a flexible pathway to degree completion. Each area of concentration will have a minimum of 20 credits.	No additional resources are anticipated as the course work for these emphasis areas will come from existing program curricula	None	None
Medical Assistant	Intermediate Technical Certificate (Medical Scribe)	Region II		Fall 2017	This certificate supplements the Medical Assistant AAS and requires an additional 25-30 credits in courses such as pathophysiology, anatomy & physiology, medical transcription II, advanced coding, word processing, clinical experience and others that will come from nursing.	TBD - possible internal reallocation		Agreement of Nursing Program to allow non-nursing students to take courses
Secondary Education: Psychology	Bachelor of Arts (BA) or Bachelor of Science (BS)	Region II	Regional	Fall 2017	The proposed program will prepare individuals to become certified teachers with an endorsement in Psychology. The program will be delivered jointly between the Social Sciences and Education and Kinesiology Divisions. [Hybrid delivery]	Adjunct instructor		

Institution Name: Lewis-Clark State College

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
Secondary Education: Communication Arts	Bachelor of Arts (BA) or Bachelor of Science (BS)	Region II	Regional	Fall 2017	The proposed program will prepare individuals to become certified teachers with an endorsement in the communication arts, specifically Journalism and Speech and Debate. The program will be delivered jointly between the Humanities and Education and Kinesiology Divisions. [Hybrid delivery]	No additional resources		
Spanish for the Professions	BA	Region II	Regional	Fall 2017	This innovative program will combine an existing core of Spanish language & culture courses with "tracks" of profession-specific coursework in either Business, Hospitality Management, or Health Sciences. Students will learn to be effective communicators in Spanish while simultaneously forming a foundation of marketable, discipline-specific professional skills. This degree will encourage internship and study abroad experiences, and will be offered in a combination of face-to-face and online coursework.	initially existing resources; with program growth anticipate increased use of adjunct instructors and eventually a 1.0 FTE Spanish faculty	N/A	None
Sport Media Studies	BS/BA	Region I, II	Regional	Fall 2017	The Sport Media Studies major prepares graduate to communicate about sports in a variety of formats, media, and contexts. This program integrates principles from kinesiology, communication arts, and media studies. It prepares students for careers in multimedia platform writing, media and public relations, promotion, and sports information. The major is offered jointly between the Education and Kinesiology and Humanities Divisions. Coursework will be offered in face-to-face and online formats.	No anticipated new resources needed.	NA	NA

Institution Name: Lewis-Clark State College

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
Web Design & Development	A.A.S. in Gaming	Region II		Fall 2017	An associate's degree that allows students to design, create, and release games for video game consoles, arcades, mobile devices, etc. Some degree requirements will come from Web Design & Development and Graphic Communications. The degree may possibly be offered online as well as live.	1.0 FTE faculty member who is well-versed in software development; Operating expenses	None	None
Program offerings commencing 2018-2019								
Bachelor of Social Work	BSW	Regions I and II	Regional	Fall 2018	This proposal is to deliver the existing Bachelor of Social Work in a hybrid format (partially online); it would co-exist with the on-campus BSW.	2.0 FTE Social Work faculty		
Sport Administration	BS/BA	Regions I and II	Regional	Fall 2018	This proposal is to deliver the existing Bachelor of Science in Sport Administration in an online format; it would co-exist with the on-campus program.	1.0 FTE Sport Administration faculty	NA	NA
English: Creative Writing	B.A.				Discontinue and replace with Creative Writing BFA			

FIVE-YEAR PLAN
Proposed Regional Programs

Institution Name: Eastern Idaho Technical College

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
Program offerings commencing 2016-2017								
Computer Security Technologies	AAS	Region VI	Regional	Fall 2016	The Computer Security Technologies Program at Eastern Idaho Technical College will prepare students for entry-level positions in Information Technology Security. The curriculum gives students an understanding of security technologies including computer fundamentals, security information, networking fundamentals and online security. Students will be trained for careers in information assurance, computer and network security. The delivery method will be lecture and laboratory.	This program will be from reallocation of existing funds and possible funding from sector grants from the Department of Labor.		Closure of existing programs will be assessed on a yearly basis to determine funds available
Computer Software Programing	AAS	Region VI	Regional	Fall 2016	The Computer Software Programing Program will prepare students for entry-level positions in computer software analysis and design. Students will gain an understanding of computer technology, computer programing, program analysis and design. The delivery method will be lecture and lab with an internship.	This program will be funded by reallocated funds or with a sector grant from the Department of Labor.		
Paramedic Program	ITC or AAS	Region VI	Regional	Spring 17	The paramedic program will prepare students to demonstrate competence in in many advanced emergency topics such as pathophysiology pharmacology, assessment, trauma, medical emergencies, cardiology, pediatrics, geriatrics and special operations and care. They will be prepared to pass certifications in ACLS, PALS and PHTLS.	This program would be funded by reallocated funds.		

Institution Name: Eastern Idaho Technical College

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
Light Duty Diesel Equipment Technician	AAS	Region VI	Regional	Spring 17	The Light Duty Diesel Equipment Technician program at EITC will prepare students to enter the work force as entry-level or apprentice technicians. This new program will include an in- depth study of equipment repair and maintenance needs. The program prerequisites will consist of the current first year diesel classes. The delivery method will be lecture and laboratory.	Reallocation of existing funds.		
Program offerings commencing 2017-2018								
Energy Systems Electrical Engineering Technology	AAS	Region VI	Regional	Fall 2017	Energy Systems Electrical Engineering Technology (EET) prepares students to pursue a career in the installation, operation, adjustment, routine maintenance, inspection, test and repair of power generation equipment. Graduates work in all fields of electrical generation with companies who design, build, operate, and maintain electrical generation systems. The delivery will be lecture and laboratory with some online instruction.	This program will require reallocation funds of $78,000.00 or a line-item request.	Eastern Idaho Technical College designated and ISU Partnering in the MOU. The first year of this program will be completed at EITC and the second year for the AAS will be at ISU. This MOU is currently in place and we would expand it to include a 2nd year at EITC.	Closure of existing programs will be assessed on a yearly basis to determine funds available
Medical Laboratory Technician	AAS	Region VI	Regional	Spring 18	The medical technician program will prepare students to work in the area of medical technician in a lab or doctor's office environment. They will perform diagnostic work on lab samples and help identify growth cultures. The will also be able to identify classifications of microbes and families they belong to. They will also be able to identify medications that can control growth of these organisms. This will be a lecture/laboratory program with some online instruction.	Funding for this program will be from new funds from a line item request.		

Institution Name: Eastern Idaho Technical College

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
Program offerings commencing 2018-2019								
Pharmacy Technology	AAS	Region VI	Regional	Fall 18	The Pharm Tech Program at Eastern Idaho Technical College will prepare students to be registered with the Board of Pharmacy and to work with a licensed pharmacist. They will perform all functions required such as preparing, compounding and distributing/ dispensing of medications. This new program will be taught on campus in a lecture/lab delivery with an on-line component. The delivery will be a hybrid between face to face lecture/lab and online.	This program will be possible by seeking new funding from a line item request.		

FIVE-YEAR PLAN
Proposed Regional Programs

Institution Name: College of Southern Idaho

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
Program offerings commencing 2016-2017								
Certified Nursing Assistant	BTC	Region IV	Regional	Fall 2016	This Basic Technical Certificate will allow students to work as certified nursing assistants and provides a route in addition to Workforce Development for such certification. Method of Delivery: Face-to-face	None	N/A	
Geospatial Technology	BTC	Region IV	Regional	Fall 2016	This program is designed to serve students and professionals who desire to gain a basic understanding of techniques and application potential of Geographical Information Systems (GIS), Global Positioning Systems (GPS), and remote sensing. The certification is intended for current students, recent graduates, and professionals interested in gaining or upgrading skills in these areas. The required courses provide students with solid understanding of the GIS interface, basic spatial analysis, and integration of remote sensing, and field data, into the GIS system. Method of Delivery: Face-to-face	Reallocation of existing funds and/or request for new funding where appropriate	NA	

Institution Name: College of Southern Idaho

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
Program offerings commencing 2017-2018								
Agricultural Diesel Technology	AAS & ITC	Region IV	Regional	Fall 2017	The program will deliver curriculum that is designed to focus on agricultural machinery and equipment, and their associated systems. Course material will cover electrical, electronic/controls, mechanical drive differences, engine, transmission and trans axle functions, emphasizing hydraulics, maintenance and trouble-shooting. Students completing this program will be prepared to enter the agricultural machinery maintenance and service industry. The program will be delivered in a composite format of lecture and hands-on, with the additional gen ed courses and a cooperative or internship component.	Reallocation of existing funds and/or request for new funding where appropriate	N/A	
Pharmacy Technician	Technical Certificate of Completion	Region IV	Regional	Fall 2017	This program will provide students with the opportunity to work as pharmacy technicians and provides a route in addition to Workforce Development for such certification. Method of Delivery: Face-to-face.	None	N/A	
Program offerings commencing 2018-2019								
Nutrition	AS	Region IV	Regional	Fall 2018	This degree covers basic concepts in nutrition and helps prepare students for entry level positions in the field. The program also prepares students to transfer into a bachelor's degree program	Reallocation of existing funds and/or request for new funding where appropriate	N/A	
Outdoor Recreational Leadership	BTC	Region IV	Regional	Fall 2018	This one year certificate will allow students to focus on meeting outdoor industry requirements by earning multiple industry endorsements. The certificate will give students the skills and industry related exposure to find work in their chosen field. Method of Delivery: Face-to-face	Program Director	N/A	

Institution Name: College of Southern Idaho

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
Program offerings commencing 2019-2020								
Dietetic Technology	AAS	Region IV	Regional	Fall 2019	Assist in the provision of food service and nutritional programs, under the supervision of a dietitian. May plan and produce meals based on established guidelines, teach principles of food and nutrition, or counsel individuals. This program will be delivered in a traditional setting with some option for gen ed components to be completed online.	Reallocation of existing funds and/or request for new funding where appropriate	NA	
Health Information Technology	AAS	Region IV	Regional	Fall 2019	Compile, process, and maintain medical records of hospital and clinic patients in a manner consistent with medical, administrative, ethical, legal, and regulatory requirements of the health care system. Process, maintain, compile, and report patient information for health requirements and standards in a manner consistent with the healthcare industry's numerical coding system. This program will be delivered in a traditional setting with some option for gen ed components to be completed online.	Reallocation of existing funds and/or request for new funding where appropriate	NA	
Home Health Aid	Technical Certificate of Completion	Region IV	Regional	Fall 2019	Home health aides help people with disabilities, chronic illness, or cognitive impairment with activities of daily living. They often help older adults who need assistance. In some states, home health aides may be able to give a client medication or check the client’s vital signs under the direction of a nurse or other healthcare practitioner. Method of Delivery: Face-to-face	Reallocation of existing funds and/or request for new funding where appropriate.	N/A	

Institution Name: College of Southern Idaho

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
Medical Lab Assistant	AAS	Region IV	Regional	Fall 2019	Perform complex medical laboratory tests for diagnosis, treatment, and prevention of disease. May train or supervise staff. This program will be delivered in a traditional setting with some option for gen ed components to be completed online.	Reallocation of existing funds and/or request for new funding where appropriate	NA	
Occupational Therapist Assistant	AAS	Region IV	Regional	Fall 2019	Occupational therapy assistants and aides help patients develop, recover, and improve the skills needed for daily living and working. Occupational therapy assistants are directly involved in providing therapy to patients; occupational therapy aides typically perform support activities. Both assistants and aides work under the direction of occupational therapists. Method of Delivery: Combination of face-to-face, hybrid and online	Reallocation of existing funds and/or request for new funding where appropriate.	N/A	
Viticulture	AAS, BTC	Region IV	Regional	Fall 2019	Duties of the viticulturist include: monitoring and controlling pests and diseases, fertilizing, irrigation, canopy management, monitoring fruit development and characteristics, deciding when to harvest and vine pruning during the winter months. Viticulturists are often intimately involved with winemakers, because vineyard management and the resulting grape characteristics provide the basis from which winemaking can begin. This training program will be designed to develop the requisite skills and knowledge to carry out the responsibilities required by the position. This program will be delivered in a traditional setting with some option for gen ed components to be completed online.	Reallocation of existing funds and/or request for new funding where appropriate	NA	

Institution Name: College of Southern Idaho

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
Program offerings commencing 2020-2021								
Diagnostic Sonography	BTC	Region IV	Regional	Fall 2020	A Sonogram Technician is a healthcare professional who conducts ultrasound examinations to help physicians diagnose and screen medical conditions. Sonogram technicians employ medical equipment using sound waves to capture images of internal tissues within the human body. These images are then used to diagnose such conditions such as cancer or to monitor fetal development in pregnancies. Method of delivery: traditional setting with some option for gen ed components to be completed online.	Reallocation of existing funds and/or request for new funding where appropriate	NA	
Structural Fire Science	AAS	Region IV	Regional	Fall 2020	This program will provide students with the foundation to find work in fire industry. It also provides continuing education opportunities for those currently working in the fire industry Method of Delivery: Combination of face-to-face, hybrid and online	Reallocation of existing funds and/or request for new funding where appropriate	N/A	

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FIVE-YEAR PLAN
Proposed Regional Programs

Institution Name: College of Western Idaho

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
Program offerings commencing 2017-2018								
Agriculture, Business, Leadership, & Education	AA	Region III	Regional	Fall 2017	This interdisciplinary program is intended to prepare students for transfer into University of Idaho's Boise-based baccalaureate program in Architecture, Communication and Leadership. Students will acquire skills to prepare them for careers in agriculture education and business. MOD: Traditional/ Hybrid	Undecided	N/A	N/A
American Sign Language	AA	Region III	Regional	Fall 2017	This program is intended to prepare students for transfer into a baccalaureate program in sign language or interpretation. This performance-based visual-gestural language sequence focuses on conversational competence of American Sign Language (ASL), receptive and expressive, in a developmental sequence via the direct interactive method, i.e. without translating to/from a first language. MOD: Traditional/Hybrid	Undecided	N/A	N/A
Animal Science	AS	Region III	Regional	Fall 2017	This program is intended to prepare students for transfer into baccalaureate programs in Animal and Veterinary Science, including veterinary medicine, animal nutrition, animal production, agricultural extension, feed and pharmaceutical sales. MOD: Traditional/ Hybrid	Undecided	N/A	N/A

Institution Name: College of Western Idaho

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
Biology-Microbiological, Molecular, and Biomedical Sciences	AS	Region III	Regional	Fall 2017	This program is intended to prepare students for transfer into baccalaureate programs in dietetics, food science, pharmacology, medicine, or programs related to biochemical research. MOD: Traditional/ Hybrid	Undecided	N/A	N/A
Chemistry	AS	Region III	Regional	Fall 2017	This program is intended to prepare students for transfer into a baccalaureate program in chemistry or a related field. Chemistry studies the composition of matter and the changes it undergoes. Chemistry majors can pursue careers in medicine, engineering, environmental science, forensic science, as well as traditional chemistry fields such as biochemistry, organic, analytical, inorganic and physical chemistry.MOD: Traditional/ Hybrid	No new resources needed	N/A	N/A
Construction/Carpentry	AAS, ATC, ITC	Region III	Regional	2017-2018	Professional delivery of the most current industry relevant training, including sustainable construction techniques and other green technologies, for our students to equip themselves with the necessary knowledge and skill sets to obtain, sustain, or advance in their chosen career paths. MOD: Face-to-Face	New State Funding	N/A	N/A
Education-Secondary STEM	AS	Region III	Regional	Fall 2017	This certificate is intended to prepare students for transfer for STEM teacher preparation. Students at CWI will complete the first two years of their STEM degree. The students will also complete related transferrable education courses to compliment the STEM discipline. Students then transfer with the intent of completing secondary teacher certification in their STEM content area. MOD: Traditional/Online	No new resources needed	N/A	N/A

Institution Name: College of Western Idaho

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
Food Processing	AAS, ATC, ITC	Region III	Regional	2017-2018	A specialization in Food and Process Technology focuses on industrial practices in modern food processing. Students learn how best to manage and supervise operations in the food processing industry as food processing technologists or managers. MOD: Face-to-Face	New State Funding	N/A	N/A
Health Science	AS	Region III	Regional	Fall 2017	This program is intended to prepare students for transfer into a baccalaureate program within surgical technician, nursing, respiratory therapy, medicine, clinical laboratory science, physical and occupational therapy. Students are provided foundational courses in biological sciences, humanities, and social sciences, as well as internship opportunities within their desired field.	Undecided	N/A	N/A
Media Arts	AA	Region III	Regional	Fall 2017	The Media Arts program provides a unique interdisciplinary approach to the converging fields of journalism, communication, and new media technology with a core foundation of media and visual literacy, a foundation of technical skills, principles of design and information hierarchy, as well as specialization skill development in: Information gathering and reporting journalistic and public relation formats, vision and photo journalism concepts and skills, and application of theory and skill. Students are prepared to transfer to a university and obtain a bachelor's degree in any of a broad range of media arts concentrations. MOD: Traditional/Hybrid.	Undecided	N/A	N/A

Institution Name: College of Western Idaho

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
Medical Lab Technician	AAS, ATC	Region III	Regional	2017-2018	Medical Laboratory Technicians help to support the work of medical technologists in identifying abnormalities in the samples such as malignancies, bacteria, parasites, or genetic abnormalities. Medical laboratory technicians also may assist in blood-typing, or other routine blood tests. Medical laboratory technicians do similar work but at a less complex level as medical technologists, as educational requirements for medical laboratory technicians are less than the requirements for medical technologists.MOD: Face-to-Face & Hybrid	New State Funding	N/A	N/A
Philosophy	AA	Region III	Regional	Fall 2017	The associate of arts degree in Philosophy is a two-year foundational program of study that prepares transfer students for a variety of majors at the baccalaureate level. The program emphasizes logical and ethical reasoning, critical thinking and problem-solving. MOD: Traditional, Online, and Hybrid.	Undecided	N/A	N/A
Public Health (emphasis in Public Health of Health Promotions)	AA	Region III	Regional	Fall 2017	This program is intended to prepare students for transfer into a baccalaureate program in public health, health promotion, or health education. It provides students with the foundation for nonclinical leadership and management positions in a range of private and public sector organizations related to health. Students will learn to plan, implement, and evaluate health promotion programs, interventions and strategies, serve as an advocate to support healthy behaviors and healthy environments, and lead in empowering individuals, groups and communities to achieve optimal health, well-being and quality of life. MOD Traditional/Hybrid	Undecided	N/A	N/A

Institution Name: College of Western Idaho

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
Spanish	AA	Region III	Region	Fall 2017	The associate of arts in Spanish is designed to provide foundational proficiency in speaking, reading, and writing. It is designed as a transfer degree to support further study in Spanish language, literature, or teaching. It also provides students the ability to capture a Spanish emphasis. MOD: Traditional/ Hybrid	No new resources needed	N/A	N/A
Studio Art--Design	AA	Region III	Regional	Fall 2017	This program is intended to prepare students for transfer into a baccalaureate program in studio art, virtual design, interior design, landscape design, architectural design, or other programs requiring a foundation in concepts of art and design. MOD: Traditional/Hybrid	No new resources needed	N/A	N/A
Program offerings commencing 2018-2019								
Computer Science	AS	Region III	Regional	Fall 2018	This program is an academic transfer program designed to prepare students to finish a Bachelor's degree in computer science and related fields. This is a general program that focuses on computers, computing problems and solutions, and the design of computer systems and user interfaces from a scientific perspective. Includes instruction in the principles of computational science, and computing theory; computer hardware design; computer development and programming; and applications to a variety of end-use situations. MOD: Traditional/Hybrid	Undecided	N/A	N/A

Institution Name: College of Western Idaho

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
Dental Hygiene	AAS	Region III	Regional	2018-2019	The Dental Hygienist is a member of the dental team and helps individuals maintain oral health and prevent oral diseases. Under the supervision of a dentist, the hygienist inspects the mouth, removes stains and deposits from teeth, applies preventative agents, prepares clinical and diagnostic tests, completes dental x-rays and performs many other services related to oral care. Dental Hygienists counsel patients about preventive measures such as nutrition, oral hygiene and dental care. MOD: Face-to-Face	New State Funding	N/A	N/A
Education - K12 Physical Education	AA	Region III	Regional	Fall 2018	This program is intended to prepare students for transfer into a baccalaureate program in Special Education. Students who complete this associate's degree are also prepared for employment in schools or other educational placements in need of paraprofessionals/teacher assistants. MOD: Traditional/Online	No new resources needed	N/A	N/A
Engineering	AS	Region III	Regional	Fall 2018	This academic program is intended to prepare students for transfer into a baccalaureate program in engineering at a four-year college. The course work emphasizes math, natural sciences, physics, engineering sciences and English. Students finish their general education core requirements at the transfer institution. MOD: Traditional/Hybrid	New Allocation	N/A	N/A
Education-Special	AA	Region III	Regional	Fall 2018	This program is intended to prepare students for transfer into a baccalaureate program in Special Education. Students who complete this associate's degree are also prepared for employment in schools or other educational placements in need of paraprofessionals/teacher assistants. MOD: Traditional/Online	New Budget Request	N/A	N/A

Institution Name: College of Western Idaho

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
Environmental and Occupational Health	AS	Region III	Regional	Fall 2018	This program is intended to prepare students for transfer into a baccalaureate program in environmental and occupational health. This interdisciplinary degree provides students the foundation that will enable them to think critically and apply scientific principles to preserve the global environment while enhancing their academic pursuits in environmental protection, occupational hygiene, and public health. MOD: Traditional/ Hybrid	Undecided	N/A	N/A
Financial Planning	AS	Region III	Regional	Fall 2018	Program prepares students for a rewarding career in the financial services industry and includes various strategies for accumulating and protecting personal wealth. Courses cover the fundamentals of management as well as introduce specific areas such as accounting, banking, credit management, insurance investments, marketing, retirement planning, and statistics. Graduates are equipped for a wide variety of entry-level positions in this rapidly growing business field. MOD: Traditional/Hybrid	Undecided	N/A	N/A
Information Technology Applications Management	AS	Region III	Regional	Fall 2018	This program is an academic transfer program designed to prepare students to finish a Bachelor's degree in information technology and related fields. This program includes coursework in computer programming, software development, mathematics, as well as management and business. MOD: Traditional/Hybrid	Undecided	N/A	N/A
Library Information Science	AA	Region III	Regional	Fall 2018	The Library and Information Science program prepares students for entering careers in library and information professions, promotes information literacy in a technological and knowledge-based environment, as well as offers opportunities for professionals, paraprofessionals and the wider community to update their skills and knowledge through continuing education courses, workshops, and seminars. MOD: Traditional/Hybrid	Undecided	N/A	N/A

Institution Name: College of Western Idaho

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
Web/Graphic Design	AAS, ATC	Region III	Regional	2018-2019	Graphic Design coursework includes study in graphic design, illustration, typography, web design and advertising. Great facilities such as Macintosh-equipped computer design studios, with the latest design and illustration software and color printers, allow students to develop professional quality portfolios MOD: Face to Face.	New State Funding	N/A	N/A
Program offerings commencing 2019-2020								
Education--Bilingual	AA	Region III	Regional	Fall 2019	This program is intended to prepare students for transfer into a baccalaureate program in Special Education. Students who complete this associate's degree are also prepared for employment in schools or other educational placements in need of paraprofessionals/teacher assistants. MOD: Traditional/Online	Undecided	N/A	N/A
Electrical Power Line Technical	AAS, ATC	Region III	Regional	2019-2020	Development of basic skills needed to be an electrical line worker. These skills include: overall safety considerations, power pole climbing skills, knowledge of the basic tools and materials involved with the electrical line crafts, general construction standards, basic rigging principles, and basic electrical theory that is specific to this trade. MOD: Face-to-Face	New State Funding	N/A	N/A
Health Policy and Leadership	AA	Region III	Regional	Fall 2019	This program is intended to prepare students for transfer into a baccalaureate program in health policy and leadership, health care administration or health information. This interdisciplinary degree provides students the foundation for nonclinical management and/or leadership positions in private and public sector organizations related to health. MOD: Traditional/Hybrid/Online	Undecided	N/A	N/A

Institution Name: College of Western Idaho

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
Hospitality Management	AAS, ATC	Region III	Regional	2019-2020	Hospitality management degree programs include the study of theoretical and practical management skills, hospitality business law and food and beverage management. Students develop skills in marketing, purchasing, budgeting and cost control. Although many entry-level management positions in the hospitality industry do not require a degree, post-secondary education is helpful for career advancement. MOD: Face-to-Face	New State Funding	N/A	N/A
Music	AA	Region III	Regional	Fall 2019	This program is intended to prepare students for transfer into a baccalaureate program in Music. Students completing a Bachelor's degree often enter the following professions: Music Performance, Music Education, Music Therapy and/or Music Business. In addition, students completing an Associate of Arts degree often work as studio teachers. MOD: Traditional/Hybrid	Undecided	N/A	N/A
Paralegal	AAS, ATC	Region III	Regional	2019-2020	Known as paralegals, legal assistants, or lawyers assistants, this program prepares graduates to assist in the effective delivery of legal services to both the public and private sector of our society. Graduates are prepared to work in law firms, banks, corporations and government agencies. MOD: Face-to-Face	New State Funding	N/A	N/A
Pharmacy Technician	AAS	Region III	Regional	2019-2020	This program provides both technical and practical training which will enable graduates, upon certification, licensure or registration, to function as a competent entry-level pharmacy technician to the licensed pharmacist. This program provides students with the basic knowledge of and practice in pharmacy calculations, drug distribution systems, and preparation of sterile dosage forms. MOD: Face-to-Face	New State Funding	N/A	N/A

Institution Name: College of Western Idaho

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
Radiology Technician	AAS	Region III	Regional	2019-2020	The program prepares student to become a radiologic technologist, serving a vital role as a highly skilled technical assistant to the radiologist. On campus, students practice their newly acquired diagnostic imaging skills in a modern radiographic laboratory and learning center under the direct supervision of qualified staff. MOD: Face-to-Face	New State Funding	N/A	N/A
Program offerings commencing 2020-2021								
Physics	AS	Region III	Regional	Fall 2020	This program is intended to prepare students for transfer into a baccalaureate program in physics or a related field. Basic courses give the student a solid foundation in the concepts of modern physics, and assist the students in developing their analytical reasoning and problem-solving skills. Laboratory courses complement this experience with an opportunity to develop experimental skills and a working knowledge of advanced technology. MOD: Traditional/ Hybrid	No new resources needed	N/A	N/A
STEM	AS	Region III	Regional	Fall 2020	This program is an academic transfer program designed to prepare students for transfer into baccalaureate programs in Science, Technology, Engineering and Mathematics in fields not represented by a more specific degree. Required STEM courses give students a solid foundation in the concepts of math, chemistry, biology, and physics, and assist the students in developing their analytical reasoning and problem-solving skills. Laboratory courses complement this experience with an opportunity to develop experimental skills and a working knowledge of advanced technology. MOD: Traditional/ Hybrid	No new resources needed	N/A	N/A

FIVE-YEAR PLAN
Proposed Regional Programs

Institution Name: North Idaho College

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
Program offerings commencing 2016-2017								
Entrepreneurship	Basic Technical Certificate	Coeur d'Alene/ Region I	Regional	Fall 2016	The Entrepreneurship program at North Idaho College prepares students to obtain employment by launching a business venture or to work in a variety of industries. The program uses an interdisciplinary instructional approach, including topics from many departments across campus. This basic technical certificate program has been added as an option in the Business Leadership AAS degree program.	No additional resources		
Pharmacy Technology	Intermediate Technical Certificate	Coeur d'Alene/Region 1; LCSC/Region II, CWI/Region III, CSI/Region IV, ISU/Region V, EITC/Region VI	Regional	Fall 2016	The Pharmacy Technician certificate is a collaborative project with ISU. The new curriculum is designed to meet the accreditation requirements for the American Society of Health-System Pharmacists (ASHP). [Hybrid delivery]	No additional resources	MOUs developed as/if requested by institutions	
Pre-Pharmacy	Associate of Science	LCSC/Region II, ISU/Region V	Regional	Fall 2016	The Pre-Pharmacy is a collaborative project with LCSC/ISU. Courses currently exist and are aligned with ISU's PharmD program.[Hybrid delivery]	No additional resources	MOUs developed pending SBOE approval	
Child Development	Academic Certificate	Coeur d'Alene/ Region I	Regional	Spring 2017	The certificate will prepare students to work in the child care field with a set of skills consistent with the growing demand for providers and in alignment with regulatory requirements for employees that do not require a degree. Method of delivery will be primarily face-to-face with some instruction on-line.	No additional resources		
Electronic Medical Records IT Support	Basic Certificate							Discontinue immediately

Institution Name: North Idaho College

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
Electronic Medical Records Adoption	Basic Technical Certificate							Discontinue immediately
Program offerings commencing 2017-2018								
Aviation Flight, Airplane	Associate of Applied Science/Advanced Technical Certificate	Coeur d'Alene/ Region I	Regional	Fall 2017	For students who wish to prepare for a career as a commercial airplane pilot. Students will work toward a college degree and commercial instrument pilot certificates at the same time. Additional ratings for flight instructor, instrument flight instructor, and multi engine may be earned. Method of delivery: face-to-face, internet, and hybrid.	Self-Sustaining	Enter into contract with Granite Aviation. MOU currently while in development. Anticipate first students Fall 2017.	
Commercial Contracting	Advanced Technical Certificate and Associate of Applied Science Degree	Coeur d'Alene/ Region I	Regional	Fall 2017	Need program description	Will seek funding for 1 FTE for one position as well as M & O	N/A	
Cybersecurity	Associate of Applied Science/Advanced Technical Certificate	Coeur d'Alene/ Region I	Regional	Fall 2017	This AAS/transfer program prepares students for entry level employment in cybersecurity or to transfer to four-year degree programs at certain colleges and universities in a variety of high-demand security-related fields including cybersecurity, computer information systems security, computer forensics, information assurance, information security engineering, information security analysis.	Will seek state funding 1.0 FTE	Pending State Board approval of degree; Need for and scope of MOU indeterminate at this time, dependent on outcomes of discussion with U of I and other partners in delivery of such a program. MOU with Whatcom Community College.	
Dental Hygiene	Associate of Applied Science	Region II	Regional	Fall 2017	This degree will allow local students the opportunity to enter into the Dental Health field without leaving the region for the required training. [Face-to-Face]	1.0 FTE Instructor; funds to support supervising dental hygienists and dentists {Current agreement with LCC = $55K/student]	LCSC	

Institution Name: North Idaho College

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
Dental Hygiene previously Dental Assistant	Associate of Applied Science	Coeur d'Alene/ Region I	Regional	Fall 2017	The program will prepare students to provide patient care, office assistance, and central supply and sterilization duties to dental offices. The didactic instruction will occur on the Coeur d'Alene campus, the clinical component will be taught at a dental facility in the community. Method of delivery: hybrid.	Grant funded; Will seek state funding	Heritage Health - pending State Board approval of degree	-
Mechatronics	Advanced Technical Certificate and Associate of Applied Science Degree	Coeur d'Alene/ Region I	Regional	Fall 2017	Mechatronics is a multifaceted field that utilizes many areas of mechanics including electronics, automation, computers, hydraulics, programmable logic controllers, electrical systems, and mechanical systems. The Mechatronics program is designed to prepare students for employment as entry-level technicians, and emphasizes extensive practical experience in both theory and laboratory setting using mock-up equipment and assemblies similar to those found in industry. Instruction advances many of the concepts learned in the first year Industrial Mechanics/Millwright portion of the program and includes theory, troubleshooting, and hands-on application in mechatronics, programmable logic controllers, pneumatics, AC and DC electrical systems, hydraulics, and motor control. Successful completion of the first two semesters of the IMM certificate program or permission of the instructor is required to enroll in the Mechatronics program. The second year of the program leads to an Advanced Technical Certificate or A.A.S. degree in Mechatronics and is intended to advance the skills learned in the one year (IMM) Intermediate Certificate program.	Will seek funding for 1.0 FTE		Mechatronics will be an addition to the current Industrial Mechanics/Millwright program and offer an Advanced Technical Certificate as well as an A.A.S. Degree

Institution Name: North Idaho College

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
Medical Laboratory Technology	Associate of Applied Science	Coeur d'Alene/ Region I; LCSC/Region II, CWI/Region III, CSI/Region IV, ISU/Region V, EITC/Region VI	Regional	Fall 2017	Many opportunities await those choosing careers in medicine and science. One of the most rewarding is medical laboratory technology. As members of the medical team, technicians work side by side with medical technologists and pathologists and have relatively less contact with patients. Medical laboratory technicians (MLTs) perform a great variety of scientific laboratory procedures, utilizing automated computerized instrumentation, all of which aid in the detection, diagnosis and treatment of disease. Method of delivery: hybrid.	No additional resources	MOUs developed as/if requested by institutions	
Resource Restoration	Associate of Science Degree	Coeur d'Alene/ Region I	Regional	Fall 2017 (FY2018)	In progress - continuing discussion with Coeur d'Alene Tribe, and UI, delivery anticipated to be as follows: Traditional classroom, on-line, hybrid/combination; Recurring new budget needed to deliver is $20000, FY 18, then ongoing.	N/A	Pending State Board approval of degree; Need for and scope of MOU indeterminate at this time, part of ongoing discussion with U of I and Coeur d'Alene Tribe for delivery of such a program.	-
Surgical Technology	Associate of Applied Science	Coeur d'Alene/ Region I	Regional	Fall 2017	The program will prepare students to assist in surgical operations in acute care and outpatient settings. Upon successful completion of the program, graduates will be eligible to become certified by passing a national licensing examination. Surgical Technologists serve as members of the operating room team under the direction of licensed professionals and provide care for patients before, during and after surgical procedures. Method of delivery: hybrid.	Grant funded; Will seek state funding	Kootenai Health - pending State Board approval of degree	

Institution Name: North Idaho College

Program Title	Degree Level/ Certificate	Region	Regional/Statewide Program Responsibility	Anticipated Delivery Date	Program Description	Anticipated Resources	Memorandum of Understanding or Contract	Other
Program offerings commencing 2018-2019								
Health Information Technology	Associate of Applied Science	Coeur d'Alene/ Region I	Regional	Fall 2018	The Health Information professional is responsible for maintaining components of health information systems consistent with the medical, legal, accreditation and regulatory requirements of the health care delivery system. The health information professional maintains, compiles and reports health information data for reimbursement, facility planning, marketing, risk management, utilization management, quality assessment and research; abstracts and codes clinical data using appropriate classification systems; and analyzes health records according to standards. This course prepares one to sit for the AHIMA registered health information technology (RHIT) credential.	Will seek state funding		
Medical Laboratory Technology	Associate of Science	Coeur d'Alene/ Region 1; LCSC/Region II, CWI/Region III, CSI/Region IV, ISU/Region V, EITC/Region VI	Regional	Fall 2018	Many opportunities await those choosing careers in medicine and science. One of the most rewarding is medical laboratory technology. As members of the medical team, technicians work side by side with medical technologists and pathologists and have relatively less contact with patients. Medical laboratory technicians (MLTs) perform a great variety of scientific laboratory procedures, utilizing automated computerized instrumentation, all of which aid in the detection, diagnosis and treatment of disease. Method of delivery: hybrid.	No additional resources	MOUs developed as/if requested by institutions	
Veterinary Technology	Associate of Applied Science	Coeur d'Alene/ Region I	Regional	Fall 2018	Veterinary Technicians are an integral part of the animal health care team, assisting veterinarians and biological technicians in their work. Graduates of the program would be afforded the opportunity to take national and state board examinations. Upon passing, students receive licensure as a Veterinary Technician. Method of delivery: hybrid.	Will seek state funding	Seeking partner agencies	

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Idaho's Public Postsecondary Institutions
Current Program Inventory

Institution	Program Title	CIP Code	Degree Level/ Certificate	Options/Minors/ Emphases	College/Dept.	Location(s)	Regional/ Statewide	Method of Delivery
CSI	Accountancy	52.0301	BBA, BA, BS		Business & Economics	BSU Campus		
CSI	Accountancy & Finance	52.0304	BA, BS, BBA		Business & Economics	BSU Campus		
UI	Agricultural Economics	1.0103	B.S.Ag.Econ.	Program emphasis: Applied Economcis; Agribusiness	CALS	Moscow	Statewide	face-to-face
UI	Applied Economics	1.0103	M.S.	Emphasis:: 1) Applied Economics; 2) Agribusiness	CALS	Moscow--Region I & II	Statewide	face-to-face
CSI	Accounting/Bookkeeping	52.0302	AAS		Business	CSI Campus	Regional	Traditional with some portion avail online
UI	Agricultural Systems Management	1.0201	B.S.Ag.L.S.	Minor	CALS	Moscow--Region I & II	Regional	Face to face/web
CSI	Addiction Studies	51.1502	AAS, ITC		Health Science & Human Services	CSI Campus	Regional	Traditional with some portion avail online
CSI	Administrative Assistant Program	52.0401	AAS, ITC		Information Technology	CSI Campus	Regional	Traditional with some portion avail online
UI	Aquaculture	1.0303		Minor	CNR	Moscow--Region I & II	Regional	Traditional
CSI	Agribusiness	1.0101	AAS, ITC		Agriculture	CSI Campus	Regional	Traditional with some portion avail online
CSI	Agriculture	1.0000	AA		Agriculture	CSI Campus	Regional	Traditional with some portion avail online
CSI	Agriculture Science	019999	AS		Agriculture	CSI Campus	Regional	Traditional with some portion avail online
CWI	Horticulture Technology, Horticulturist	1.0601	AAS, ATC, ITC	NA	Professional Technical Education	Nampa/Region III	Regional	Traditional
UI	Agricultural Extension Education	1.0801		Minor	CALS	Moscow--Region I & II	Regional	face-to-face
UI	Agricultural Science, Communication and Leadership	1.0802	B.S.Ag.L.S.		CALS	Moscow--Region I & II	Regional	face-to-face
CSI	Air Cond, Refrig, & Heat	47.0201	AAS, ITC		Trade & Industry	CSI Campus	Regional	Traditional with some portion avail online
CSI	Animal Science	1.0901	AAS		Agriculture	CSI Campus	Regional	Traditional with some portion avail online
UI	Animal and Veterinary Science	1.0901	B.S.A.V.S.	Options: 1) Business Option; 2) Dairy Science; 3)Production; 4) Science/Preveterinary	CALS	Moscow--Region I & II	Statewide	face-to-face
UI	Animal Physiology	1.0901	Ph.D.		CALS	Moscow--Region I & II	Regional	face-to-face
UI	Animal Science	1.0901	M.S.	Minor	CALS	Moscow--Region I & II	Statewide	face-to-face
UI	Food Science	1.1001	B.S.F.S.; M.S.; Ph.D.	Program Options: 1) Food Science; 2) Dairy Food Management	CALS	Moscow--Region I & II	Statewide	face to face

Institution	Program Title	CIP Code	Degree Level/ Certificate	Options/Minors/ Emphases	College/Dept.	Location(s)	Regional/ Statewide	Method of Delivery
CSI	Animal Science	1.0901	AS		Agriculture	CSI Campus	Regional	Traditional with some portion avail online
UI	Plant Science	1.1101	M.S.; Ph.D.		CALS	Moscow--Region I & II	Statewide	traditional/video link
UI	Crop Science	1.1102		Minor	CALS	Moscow--Region I & II	Regional	traditional/video link
UI	Horticulture	1.1103		Minor	CALS	Moscow--Region I & II	Regional	traditional/video link
UI	Sustainable Crop and Landscape Systems	1.1103	B.S.Ag.L.S.	Options: 1) Insects & Society; 2) Soil & Land Use; 3) Sustainable Cropping Systems; 4) Environmental Horticulture; 5) Plant Biotechnology	CALS	Moscow/Region I & II	Regional	traditional/video link
UI	Plant Protection	1.1105		Minor	CALS	Moscow--Region I & II	Regional	traditional/video link
UI	Rangeland Ecology and Management	1.1106	B.S.Rangeland Ecol.-Mgt.	Minor	CNR	Moscow--Region I & II	Statewide	Traditional
UI	Soil and Land Resources	1.1201	M.S.; Ph.D.		CALS	Moscow/Region I & II	Regional	traditional/video link
UI	Soil Science	1.1201		Minor	CALS	Moscow/Region I & II	Regional	traditional/video link
NIC	Accounting Assistant	52.0302	Tech. Certificate	Bookkeeping	Accounting	Coeur d'Alene	Region	Traditional Web Enhanced On-line Hybrid Self-Paced
NIC	Accounting Assistant	52.0302	Adv. Tech. Cert.	Bookkeeping	Accounting	Coeur d'Alene	Region	Traditional Web Enhanced On-line Hybrid Self-Paced
BSU	Environmental Studies	3.0103	B.A.		Arts & Sciences/ Administration	Boise	Regional	Traditional
BSU	Environmental Studies	3.0103		Minor	Arts & Sciences/ Administration	Boise	Regional	Traditional
UI	Environmental Contaminant Assessment	3.0104	Certificate		CLASS	Moscow--Region I & II	Regional	hybrid
UI	Environmental Science	3.0104	B.S.Env.S.; M.S.; Ph.D.	Options: 1) Biological Science; 2) Physical Science; 3) Physical Science 2; 4) Social Science	CNR	Moscow--Region I & II	Regional	traditional; hybrid
UI	Environmental Water Science	3.0104	Certificate		CLASS	Moscow--Region I & II	Regional	traditional

Institution	Program Title	CIP Code	Degree Level/ Certificate	Options/Minors/ Emphases	College/Dept.	Location(s)	Regional/ Statewide	Method of Delivery
UI	Natural Resources and Environmental Science	3.0104	P.S.M.	Program Options: Water Resources Management; Environmental Contamination; Sustainability Science; Climate Change Science; Management of Regulated River Systems; Ecohydrology Science and Management	CNR	Moscow, CdA, Boise, Idaho Falls--Region I & II, Region III, Region VI	Regional	Traditional, hybrid
UI	Conservation Social Sciences	3.0201		Minor	CNR	Moscow--Region I & II	Regional	Traditional
UI	Environmental Communication	3.0201		Minor	CNR	Moscow--Region I & II	Regional	Traditional
UI	Natural Resources	3.0201	M.N.R.; M.S.; Ph.D.	Minor; M.N.R. program options: Integrated; Fire Ecology	CNR	Moscow--Region I & II	Statewide	Traditional; Online: M.N.R.
UI	Natural Resource Economics	3.0204		Minor	CALS	Moscow--Region I & II	Regional	
UI	Natural Resource Conservation	3.0207	B.S.Nat.Resc.Consv.	Program Options: 1)Conservation Planning and management; 2) conservation science	CNR	Moscow--Region I & II	Statewide	traditional
UI	Fishery Resources	3.0301	B.S.Fish.Res.	Minor	CNR	Moscow--Region I & II	Statewide	Traditional
UI	Forest Resources	3.0502	B.S.For.Res.	Minor	CNR	Moscow--Region I & II	Statewide	Traditional
UI	Fire Ecology and Management (Fire, Ecology, Management, and Technology graduate certificate)	3.0506	B.S.Fire.Ecol.Mgmt; Graduate Certificate	Minor	CNR	Moscow--Region I & II	Statewide	Traditional; Online: Graduate Certificate
UI	Renewable Materials	3.0509	B.S.Renew.Mat.	Minor	CNR	Moscow--Region I & II	Statewide	Traditional
UI	Forest Operations	3.0510		Minor	CNR	Moscow--Region I & II	Regional	Traditional
UI	Parks, Protected Areas and Wilderness Conservation	3.0601		Minor	CNR	Moscow--Region I & II	Regional	Traditional
UI	Wildlife Resources	3.0601	B.S.Wldl.Res.	Minor	CNR	Moscow/Region I & II	Statewide	Traditional
UI	Architecture	4.0201	B.S.Arch; M.Arch.	Minor	CAA	Moscow--Region I & II	Statewide	Face to Face w/ several distance compressed video and online
UI	Integrated Architecture and Design	4.0201	M.S.		CAA	Moscow--Region I & II	Regional	traditional
UI	Bioregional Planning and Community Design	4.0301	M.S.; Certificate		CAA	Moscow, Boise --Region I & II, Region III	Regional	Face-to-face & hybrid
UI	Landscape Architecture	4.0601	B.S.L.A.; M.L.A.	Minor	CAA	Moscow/Boise--Region I & II, Region III	Statewide	Face to Face (Traditional)
UI	Latin-American Studies	5.0107	B.A.		CLASS	Moscow--Region I & II	Regional	traditional
BSU	Canadian Studies	5.0115		Minor	Public Service/ Political Science	Boise	Regional	Traditional
BSU	Iberian Studies	5.0130		Minor	Arts & Sciences/ World Languages	Boise	Regional	Traditional
BSU	Native American Studies	5.0202		Minor	Arts & Sciences/ Anthropology	Boise	Regional	Traditional

Institution	Program Title	CIP Code	Degree Level/ Certificate	Options/Minors/ Emphases	College/Dept.	Location(s)	Regional/ Statewide	Method of Delivery
NIC	Accounting Assistant	52.0302	A.A.S.	N/A	Accounting	Coeur d'Alene	Region	Traditional Web Enhanced On-line Hybrid Self-Paced
UI	American Indian Studies	5.0202		Minor	CLASS	Moscow--Region I & II	Regional	hybrid
BSU	Latin American and Latino/a Studies	5.0203		Minor	Arts & Sciences/ World Languages	Boise	Regional	Traditional
BSU	Mexican American Studies	5.0203		Minor	Arts & Sciences/ Sociology	Boise	Regional	Traditional
UI	Women's and Gender Studies	5.0207		Minor	CLASS	Moscow/Region I & II	Regional	traditional
BSU	Ethnic Studies	5.0299	B.S.		Arts & Sciences/ Sociology	Boise	Regional	Traditional
BSU	Ethnic Studies	5.0299		Minor	Soc Sci & Public Affairs/ Sociology	Boise	Regional	Traditional
BSU	Gender Studies	5.0299		Minor	Arts & Sciences/ Administration	Boise	Regional	Traditional
CSI	Animal Science Livestock Technician	1.0302	ITC		Agriculture	CSI Campus	Regional	Traditional with some portion avail online
BSU	Communication	9.0101	B.A.	Emphases: Communication; Media Production; Journalism Media Studies; Public Communication; Relational and Organizational Studies	Arts & Sciences/ Communication	Boise	Regional	Traditional
BSU	Communication	9.0101	M.A.		Arts & Sciences/ Communication	Boise	Regional	Traditional
BSU	Communication	9.0101		Minor	Arts & Sciences/ Communication	Boise	Regional	Traditional
CWI	Communication	9.0101	AA	NA	Social Sciences and Public Affairs/Department of Culture, History, and Politics	Nampa/Region III	Regional	Traditional/Hybrid
LCSC	Communication Arts	9.0101	BA, BS		Humanities	Lewiston	Regional	classroom
NIC	Administration of Justice	43.0107	A.A.S.	N/A	Criminal Justice	Coeur d'Alene	Region	Traditional Web Enhanced On-line Hybrid
NIC	Administrative Assistant	52.0402	A.A.S.	N/A	Computer App/Office Tech	Coeur d'Alene	Region	Traditional Web Enhanced On-line Hybrid Self-Paced
UI	Communication Studies	9.0101		Minor	CLASS	Moscow--Region I & II	Regional	hybrid
UI	Journalism	9.0401	B.A.; B.S.	Minor	CLASS	Moscow--Region I & II	Regional	traditional
UI	Broadcasting and Digital Media	9.0702	B.A.; B.S.	Minor	CLASS	Moscow--Region I & II	Regional	traditional

Institution	Program Title	CIP Code	Degree Level/ Certificate	Options/Minors/ Emphases	College/Dept.	Location(s)	Regional/ Statewide	Method of Delivery
UI	Organizational Dynamics	9.0901	Graduate Certificate		CLASS	Moscow/CdA--Region I & 2	Regional	hybrid
UI	Organizational Sciences	9.0901	B.A.; B.S.		CLASS	Moscow/CdA--Region I & 2	Regional	hybrid
BSU	Public Relations	9.0902	Certificate, Undergraduate		Arts & Sciences/ Communication	Boise	Regional	Traditional
UI	Public Relations	9.0902	B.A.; B.S.	Minor	CLASS	Moscow--Region I & II	Regional	traditional
UI	Advertising	9.0903	B.A.; B.S.	Minor	CLASS	Moscow--Region I & II	Regional	traditional
LCSC	English: Publishing Arts	9.1001	BA	emphasis	Humanities	Lewiston	Regional	classroom
BSU	Conflict Management	9.9999	Graduate Certificate		Public Service/ Public Policy and Administration	Boise	Regional	Traditional
BSU	Dispute Resolution	9.9999	Certificate, Undergraduate		Public Service/ Public Policy and Administration	Boise	Regional	Traditional
LCSC	Graphic Communications	10.0301	AAS, BAS		BTS	Lewiston/Region 2	Regional	classroom
ISU	Accountancy	52.0301	MACC		Business	ISU Campus	Regional	Face-to-Face
ISU	Accounting	52.0301	BBA	Tracks	Business	ISU Campus	Regional	Face-to-Face
ISU	Accounting Technology	52.0302	ITC,AAS	N/A	Technology	ISU Campus	Regional	Hybrid
ISU	Advanced Automation and Manufacturing Tec	15.0613	ITC		Technology	ISU Campus	Regional	
ISU	Advanced Automation and Manufacturing Tec	15.0613	AAS		Technology	ISU Campus	Regional	
ISU	Aircraft Maintenance Technology	47.0608	ITC,ATC,BAS	N/A	Technology	ISU Campus	Regional	Face-to-Face
ISU	Airframe	47.0607	ITC	N/A	Technology	ISU Campus	Regional	Face-to-Face
ISU	Airframe and Powerplant (need to inactivate)	47.0608	AAS	NA	Technology	ISU Campus	Regional	Face-to-Face
ISU	Anthropology	45.0201	BA	American Indian Studies, Anthropology, Latino Studies, Linguistics minors	Arts and Letters	ISU Campus	Regional	Hybrid
ISU	Anthropology	45.0201	MA,MS	American Indian Studies, Anthropology, Latino Studies, Linguistics minors	Arts and Letters	ISU Campus	Regional	Face-to-Face
ISU	Applied Geophysics	40.0603	MS		Science and Engineering	ISU Campus	Regional	Hybrid
ISU	Art	50.0701	BA, BFA	Art History, Studio minors	Arts and Letters	ISU Campus	Regional	Face-to-Face
ISU	Art	50.0701	MFA	Art History, Studio minors	Arts and Letters	ISU Campus	Regional	Face-to-Face
ISU	Athletic Training	51.0913	MS	N/A	Education	ISU Campus	Regional	Face-to-Face
ISU	Audiology (first 2 years)	51.0202	AuD	Options	Division of Health Sciences	ISU Campus	Statewide	Hybrid
ISU	Audiology (second 2 years)	51.0202	AuD	Options	Division of Health Sciences	ISU-Meridian Ctr	Statewide	Hybrid
ISU	Auto Collision Repair and Refinishing	47.0603	ITC,ATC,AAS, BAT	N/A	Technology	ISU Campus	Regional	Face-to-Face
ISU	Automotive Technology	47.0604	ITC,AAS,BAS	N/A	Technology	ISU Campus	Regional	Face-to-Face
ISU	Bachelor of Applied Science	24.0101	BAS	N/A	Technology	ISU Campus	Regional	Face-to-Face
ISU	Bachelor of Applied Technology	24.0101	BAT		Technology	University Place	Regional	Face-to-Face
ISU	Bachelor of University Studies	30.9999	BA,BS	N/A	Arts and Letters	ISU Campus	Regional	Hybrid
ISU	Bachelor of University Studies	30.9999	BA,BS	N/A	Arts and Letters	University Place	Regional	Hybrid
ISU	Bachelor of University Studies	30.9999	BA,BS	N/A		CSI Campus	Regional	Hybrid
ISU	Biochemistry	26.0210	BS	N/A	Science and Engineering	ISU Campus	Regional	Hybrid

Institution	Program Title	CIP Code	Degree Level/ Certificate	Options/Minors/ Emphases	College/Dept.	Location(s)	Regional/ Statewide	Method of Delivery
ISU	Biology	26.0101	BA, BS	Botany, Ecology, Microbiology, Zoology minors	Science and Engineering	ISU Campus	Regional	Hybrid
ISU	Biology	26.0101	MS, MNS	Botany, Ecology, Microbiology, Zoology minors	Science and Engineering	ISU Campus	Regional	Hybrid
ISU	Biology	26.0101	DA, Ph D	Botany, Ecology, Microbiology, Zoology minors	Science and Engineering	ISU Campus	Regional	Face-to-Face
ISU	Blended Early Childhood Education	13.2100	BA		Education	ISU Campus	Regional	Hybrid
ISU	Bus. Admin. (Health Care Admin. Emph.)	52.0201	MBA Emph.	Emphases	Business	ISU Campus	Regional	Hybrid
ISU	Business	52.0101	AS	N/A	Business	ISU Campus	Regional	Face-to-Face
ISU	Business	52.0101	AS	N/A	Business	University Place	Regional	Face-to-Face
ISU	Business Admin. (Accounting Emph.)	52.0201	MBA Emph.	Emphasis	Business	ISU Campus	Regional	Hybrid
ISU	Business Admin. (CIS Emph.)	52.0201	MBA Emph.	Emphasis	Business	ISU Campus	Regional	Hybrid
ISU	Business Admin. (Finance Emph.)	52.0201	MBA Emph.	Emphasis	Business	ISU Campus	Regional	Hybrid
ISU	Business Admin. (HCA Emphasis)	52.0201	MBA Emph.	Emphasis	Business	ISU Campus	Regional	Hybrid
ISU	Business Admin. (Management Emph.)	52.0201	MBA Emph.	Emphasis	Business	ISU Campus	Regional	Hybrid
ISU	Business Admin. (Marketing Emph.)	52.0201	MBA Emph.	Emphasis	Business	ISU Campus	Regional	Hybrid
ISU	Business Admin. (Native American Bus. Emph.)	52.0201	MBA Emph.	Emphasis	Business	ISU Campus	Regional	Hybrid
ISU	Business Admin. (Operations Mgmt. Emph.)	52.0201	MBA Emph.	Emphasis	Business	ISU Campus	Regional	Hybrid
ISU	Business Administration	52.0201	PB Cert	Emphases	Business	ISU Campus	Regional	Hybrid
ISU	Business Administration	52.0201	MBA	Emphases	Business	ISU Campus	Regional	Hybrid
ISU	Business Administration	52.0201	MBA	Emphases	Business	University Place	Regional	Hybrid
ISU	Business Technology	52.0407	BTC,ITC,AAS	N/A	Technology	ISU Campus	Regional	Hybrid
ISU	Business Technology - Small Business	52.0401	BTC, ITC, ATC, AAS, BAT	N/A	Technology	ISU Campus	Regional	Hybrid
ISU	Chemistry	40.0501	BA, BS		Science and Engineering	ISU Campus	Regional	Hybrid
ISU	Chemistry	40.0501	MNS, MS		Science and Engineering	ISU Campus	Regional	Hybrid
ISU	Child and Family Studies	13.1210	BA		Education	ISU Campus	Regional	Face-to-Face
ISU	Civil Engineering	14.0801	BS	Emphasis	Science and Engineering	ISU Campus	Regional	Hybrid
ISU	Civil Engineering	14.0801	MS	Emphasis	Science and Engineering	ISU Campus	Regional	Hybrid
ISU	Civil Engineering Technology	15.0201	ITC,ATC,AAS, BAS	N/A	Technology	ISU Campus	Regional	Hybrid
ISU	Civil Engineering Technology-Materials Testing and Specifiction	15.0201	BTC	NA	Technology	ISU Campus	Regional	Hybrid
ISU	Clinical Psychology	42.2801	Ph D	N/A	Arts and Letters	ISU Campus	Regional	Face-to-Face
ISU	Communication and Rhetorical Studies	09.0100	MA	Organizational Comm, Rhetorical Studies minors, emphases	Arts and Letters	ISU Campus	Regional	Face-to-Face

Institution	Program Title	CIP Code	Degree Level/ Certificate	Options/Minors/ Emphases	College/Dept.	Location(s)	Regional/ Statewide	Method of Delivery
ISU	Communication and Rhetorical Studies	09.0101	BA, BS	Organizational Comm, Rhetorical Studies minors, emphases	Arts and Letters	ISU Campus	Regional	Hybrid
ISU	Communication Sciences & Disorders	51.0204	Academic Certificate	N/A	Division of Health Sciences	ISU Campus	Regional	Online
ISU	Communication Sciences and Disorders	51.0204	BS-Pre-Audiology	Emphases	Division of Health Sciences	ISU Campus	Regional	Hybrid
ISU	Communication Sciences and Disorders	51.0204	BS-Pre-Speech Pathology	Emphases	Division of Health Sciences	ISU-Meridian Ctr	Regional	Hybrid
ISU	Computer Aided Design Drafting Technology	15.1302	ATC, AAS, BAS	N/A	Technology	ISU Campus	Regional	Face-to-Face
ISU	Computer Network Technician	11.0901	ITC,ATC		Technology	ISU Campus	Regional	Face-to-Face
ISU	Computer Science	11.0101	BS	Computer Science minor	Science and Engineering	ISU Campus	Regional	Hybrid
ISU	Computer Software Engineering Tech.	15.1204	BAS	N/A	Technology	ISU Campus	Regional	Face-to-Face
ISU	Computer/Business Equipment Technology	47.0102	AAS,ATC	N/A	Technology	ISU Campus	Regional	Face-to-Face
ISU	Cosmetology	12.0401	ATC	N/A	Technology	ISU Campus	Regional	Face-to-Face
ISU	Cosmetology - Nail Technology	12.0401/12.0410	BTC		Technology	ISU Campus	Regional	Face-to-Face
ISU	Counseling	51.1508	Ed S	N/A	Division of Health Sciences	ISU Campus	Regional	Hybrid
ISU	Counseling	51.1508	Ed S	N/A	Division of Health Sciences	ISU-Meridian Ctr	Regional	Hybrid
ISU	Counselor Education and Counseling	51.1599	Ph D	N/A	Division of Health Sciences	ISU Campus	Regional	Hybrid
ISU	Counselor Education and Counseling	51.1599	Ph D	N/A	Division of Health Sciences	ISU-Meridian Ctr	Regional	Hybrid
ISU	Criminal Justice	43.0104	AA	Options	Arts and Letters	ISU Campus	Regional	Hybrid
ISU	Cyber-physical Security (Fall 16)	43.0303	ITC, AAS		Technology	ISU Campus	Regional	Classroom/Lab
ISU	Dance	50.0301	BA		Arts and Letters	ISU Campus	Regional	Face-to-Face
ISU	Deaf Education	13.1003	MS	N/A	Education	ISU Campus	Statewide	Online
ISU	Dental Hygiene	51.0602	BS	N/A	Division of Health Sciences	ISU Campus, Idaho Falls (EITC)	Statewide	Hybrid
ISU	Dental Hygiene	51.0602	MS	N/A	Division of Health Sciences		Statewide	Online
ISU	Dentistry, Advanced General	60.0199	Cert of Completion	N/A	Division of Health Sciences	ISU-Meridian Ctr	Regional	Face-to-Face
ISU	Diesel/On-Site Power Generation Technology	47.0605	ATC,AAS,BAS	N/A	Technology	ISU Campus	Regional	Face-to-Face
ISU	Dietetics	51.3101	BS	N/A	Division of Health Sciences	ISU Campus	Regional	Hybrid
ISU	Dietetics	51.3101	PB Cert	N/A	Division of Health Sciences	ISU Campus	Regional	Hybrid
ISU	Dietetics	51.3101	PB Cert	N/A	Division of Health Sciences	ISU-Meridian Ctr	Regional	Hybrid
ISU	Early Childhood Care and Education	13.1210	ITC,AAS, BAT	N/A	Technology	ISU Campus	Regional	Face-to-Face
ISU	Early Childhood Care and Education (Family Child Care)	19.0708	BTC	N/A	Technology	ISU Campus	Regional	Face-to-Face
ISU	Earth and Environmental Systems	40.0699	BS, BA	Geology, Geotechnology minors, tracks	Science and Engineering	ISU Campus	Regional	Hybrid
ISU	Economics	45.0601	BA, BS	Economics minor, options	Business	ISU Campus	Regional	Hybrid
ISU	Education, General	13.0101	M Ed	Emphases	Education	ISU Campus	Regional	Hybrid
ISU	Education, General (Child & Family Studies)	13.1308	M Ed Emp.	Emphasis	Education	ISU Campus	Regional	Hybrid
ISU	Education, General (Ed. Administration)	13.0499	M Ed Emp.	Emphasis	Education	CSI Campus	Regional	Hybrid

Institution	Program Title	CIP Code	Degree Level/ Certificate	Options/Minors/ Emphases	College/Dept.	Location(s)	Regional/ Statewide	Method of Delivery
ISU	Education, General (Ed. Administration)	13.0499	M Ed Emp.	Emphasis	Education	ISU Campus	Regional	Hybrid
BSU	Elementary Korean	16.0303	Certificate, Undergraduate		Arts & Sciences/ World Languages	Boise	Regional	Traditional
BSU	Intermediate Korean	16.0303	Certificate, Undergraduate		Arts & Sciences/ World Languages	Boise	Regional	Traditional
ISU	Education, General (Ed. Administration)	13.0499	M Ed Emp.	Emphasis	Education	University Place	Regional	Hybrid
ISU	Education, General (Elementary Ed.)	13.1202	M Ed Emp.	Emphasis	Education	CSI Campus	Regional	Hybrid
BSU	Elementary German	16.0501	Certificate, Undergraduate		Arts & Sciences/ World Languages	Boise	Regional	Traditional
BSU	German	16.0501	B.A.		Arts & Sciences/ World Languages	Boise	Regional	Traditional
BSU	German	16.0501		Minor	Arts & Sciences/ World Languages	Boise	Regional	Traditional
BSU	German for Business	16.0501		Minor	Arts & Sciences/ World Languages	Boise	Regional	Traditional
BSU	Intermediate German	16.0501	Certificate, Undergraduate		Arts & Sciences/ World Languages	Boise	Regional	Traditional
UI	German	16.0501		Minor	CLASS	Moscow--Region I & II	Regional	traditional
NIC	Aerospace Technology	47.0607	AAS, ATC, BTC	Aviation Maintenance Techn	CTE	Coeur d'Alene/Region I	Region	Traditional
BSU	Romance Languages	16.0900		Minor	Arts & Sciences/ World Languages	Boise	Regional	Tradional
ISU	Education, General (Elementary Ed.)	13.1202	M Ed Emp.	Emphasis	Education	ISU Campus	Regional	Hybrid
BSU	Elementary French	16.0901	Certificate, Undergraduate		Arts & Sciences/ World Languages	Boise	Regional	Traditional
BSU	French	16.0901	B.A.		Arts & Sciences/ World Languages	Boise	Regional	Traditional
BSU	French	16.0901		Minor	Arts & Sciences/ World Languages	Boise	Regional	Traditional
BSU	French for Business	16.0901		Minor	Arts & Sciences/ World Languages	Boise	Regional	Traditional
BSU	Intermediate French	16.0901	Certificate, Undergraduate		Arts & Sciences/ World Languages	Boise	Regional	Traditional
UI	French	16.0901	B.A.	Minor	CLASS	Moscow--Region I & II	Regional	traditional/study abroad
ISU	Education, General (Elementary Ed.)	13.1202	M Ed Emp.	Emphasis	Education	University Place	Regional	Hybrid
BSU	Elementary Spanish	16.0905	Certificate, Undergraduate		Arts & Sciences/ World Languages	Boise	Regional	Traditional
BSU	Intermediate Spanish	16.0905	Certificate, Undergraduate		Arts & Sciences/ World Languages	Boise	Regional	Traditional
BSU	Spanish	16.0905	B.A.		Arts & Sciences/ World Languages	Boise	Regional	Traditional
BSU	Spanish	16.0905		Minor	Arts & Sciences/ World Languages	Boise	Regional	Traditional
UI	Spanish	16.0905	B.A.	Minor	CLASS	Moscow/Region I & II	Regional	traditional/study abroad
ISU	Education, General (K-12 Education)	13.0101	M Ed Emp.	Emphasis	Education	ISU Campus	Regional	Hybrid

Institution	Program Title	CIP Code	Degree Level/ Certificate	Options/Minors/ Emphases	College/Dept.	Location(s)	Regional/ Statewide	Method of Delivery
BSU	Arabic Studies	16.1101		Minor	Arts & Sciences/ World Languages	Boise	Regional	Traditional
BSU	Intermediate Arabic	16.1101	Certificate, Undergraduate		Arts & Sciences/ World Languages	Boise	Regional	Traditional
BSU	Elementary Latin	16.1203	Certificate, Undergraduate		Arts & Sciences/ World Languages	Boise	Regional	Traditional
BSU	Intermediate Latin	16.1203	Certificate, Undergraduate		Arts & Sciences/ World Languages	Boise	Regional	Traditional
BSU	Latin	16.1203		Minor	Arts & Sciences/ World Languages	Boise	Regional	Traditional
BSU	American Sign Language	16.1601		Minor	Arts & Sciences/ World Languages	Boise	Regional	Traditional
BSU	Intermediate American Sign Language	16.1601	Certificate, Undergraduate		Arts & Sciences/ World Languages	Boise	Regional	Traditional
ISU	Education, General (Literacy)	13.1502	M Ed Emp.	Emphasis	Education	ISU Campus	Regional	Hybrid
ISU	Education, General (Secondary Education)	13.1205	M Ed Emp.	Emphasis	Education	CSI Campus	Regional	Hybrid
ISU	Education, General (Secondary Education)	13.1205	M Ed Emp.	Emphasis	Education	ISU Campus	Regional	Hybrid
BSU	Basque Studies	16.9999		Minor	Arts & Sciences/ World Languages	Boise	Regional	Traditional
CSI	Anthropology	45.0201	AA		Social Science	CSI Campus	Regional	Traditional with some portion avail online
UI	Family and Consumer Sciences	19.0101	M.S.		CALS	Moscow--Region I & II	Regional	Traditional, combination
NIC	American Indian Studies	5.0202	A.A.	N/A	American Indian St.	Coeur d'Alene	Region	Traditional Web Enhanced On-line Hybrid
UI	Food and Nutrition	19.0501	B.S.F.C.S.	Options: 1) Coordinated Program in Dietetics; 2) Nutrition	CALS	Moscow, CdA (snr CPD students only)--Region I & II	Regional	Traditional, combination
UI	Child, Family and Consumer Studies	19.0701	B.S.F.C.S.	Options: 1) Child and Youth Development; 2) Family Development and Aging; 3) Consumer and Community Development	CALS	Moscow--Region I & II	Regional	traditional/combination
UI	Early Childhood Development and Education	19.0701	B.S.Erly.Chldhd.Dev.Ed.		CALS	Moscow--Region I & II	Regional	Traditional, combination
UI	Aging Studies	19.0702		Minor	CLASS	Moscow--Region I & II	Regional	traditional
BSU	Family Studies	19.0704		Minor	Arts & Sciences/ Psychology	Boise	Regional	Traditional
BSU	Family Studies	19.0704	Graduate Certificate		Arts & Sciences/ Psychology	Boise	Regional	Traditional
NIC	Anthropology	45.0201	A.A.	N/A	Anthropology	Coeur d'Alene	Region	Traditional, Web Enhanced, On-line, Hybrid

Institution	Program Title	CIP Code	Degree Level/ Certificate	Options/Minors/ Emphases	College/Dept.	Location(s)	Regional/ Statewide	Method of Delivery
NIC	Apprenticeship - Plumbing		AAS			Coeur d'Alene	Region	
NIC	Apprenticeship - Electrical		AAS			Coeur d'Alene	Region	
NIC	Apprenticeship - HVACR		AAS			Coeur d'Alene	Region	
NIC	Art	50.0402	A.A.	Fine Arts	Art	Coeur d'Alene	Region	Traditional, Web Enhanced, On-line, Hybrid
ISU	Education, General (Secondary Education)	13.1205	M Ed Emp.	Emphasis	Education	University Place	Regional	Hybrid
CSI	Aquaculture	1.0303	AAS, ITC		Agriculture	CSI Campus	Regional	Traditional with some portion avail online
CWI	Early Childhood Education	19.0708	AAS, ATC, ITC, BTC	NA	Professional Technical Education	Nampa/Region III	Regional	Traditional
UI	Apparel, Textiles and Designs	19.0901	B.S.F.C.S.		CALS	Moscow--Region I & II	Regional	traditional, online
UI	Law	22.0101	J.D.	Emphasis: 1) Business Law & Entrepreneurship; 2) Litigation & Laternate Dispute; 3) Native America Law; 4) Natural Resources & Environmental Law	LAW	Moscow/Boise--Region I & II, Region III	Statewide	Traditional with the use of some on-line and video conference capability
NIC	Automotive Technology (need to inactivate or discontinue)	47.0604	BTC	Basic	Automotive Tech.	Coeur d'Alene	Region	Has not been offered in the past Not in catalog
LCSC	Legal Adminitrative Assistant	22.0301	BAS, AAS, ATC, ITC		BTS	Lewiston/Region 2	Regional	classroom
LCSC	Legal Office Technology	22.0301	ITC		BTS	Lewiston/Region 2	Regional	classroom
ISU	Educational Administration	13.0499	Ed S		Education	ISU Campus	Regional	Hybrid
EITC	Legal Assistant	22.0302	LGL.AAS	N/A	Legal Technologies	Idaho Falls, ID	Regional	Lecture/Lab
EITC	Legal Assistant	22.0302	LGL. ITC	N/A	Legal Technologies	Idaho Falls, ID	Regional	Lecture/Lab
LCSC	Paralegal	22.0302	BAS, AAS, ITC		BTS	Lewiston/Region 2	Regional	classroom
ISU	Educational Leadership	13.0401	Ed D	N/A	Education	ISU Campus	Regional	Hybrid
ISU	Educational Leadership (Ed. Admin.)	13.0401	Ed D Emp.	N/A	Education	ISU Campus	Regional	Hybrid
BSU	English	23.0101	B.A.	Emphases: English; Linguistics; Literature; Technical Communication; Writing	Arts & Sciences/ English	Boise	Regional	Traditional
BSU	English	23.0101	M.A.	Emphases: English; Literature; Rhetoric and	Arts & Sciences/ English	Boise	Regional	Traditional
BSU	English	23.0101		Minor	Arts & Sciences/ English	Boise	Regional	Traditional
CSI	Art, Visual	50.0701	AA		Fine Arts	CSI Campus	Regional	Traditional with some portion available online
CWI	English	23.0101	AA	NA	Language & Arts/Department of English	Nampa/Region III	Regional	Traditional, Hybrid, Online
LCSC	English	23.0101	BA		Humanities	Lewiston	Regional	classroom

Institution	Program Title	CIP Code	Degree Level/ Certificate	Options/Minors/ Emphases	College/Dept.	Location(s)	Regional/ Statewide	Method of Delivery
NIC	Automotive Technology	47.0604	ITC	N/A	Automotive Tech.	Coeur d'Alene	Region	Traditional Web Enhanced On-line Hybrid
UI	English	23.0101	B.A.; M.A.	Minor: 1) professional writing; 2) creative writing; 3) English; Program Emphasis: 1) Literature; 2) Creative Writing; 3) Professional Writing; 4) Teaching;	CLASS	Moscow--Region I & II	Regional	traditional
BSU	English, Rhetoric and Composition	23.0401	M.A.		Arts & Sciences/English	Boise	Regional	Traditional
BSU	Creative Writing	23.0501	M.F.A.		Arts & Sciences/English	Boise	Regional	Traditional
LCSC	English: Creative Writing	23.0501	BA		Humanities	Lewiston	Regional	classroom
BSU	English, Technical Communication	23.1301	Certificate, Undergraduate		Arts & Sciences/English	Boise	Regional	Traditional
BSU	Technical Communication	23.1301	Certificate, Undergraduate		Arts & Sciences/ English	Boise	Regional	Traditional
BSU	Technical Communication	23.1301	M.A.		Arts & Sciences/ English	Boise	Regional	Traditional
BSU	Technical Communication	23.1301	Graduate Certificate		Arts & Sciences/ English	Boise	Regional	Traditional
UI	Creative Writing	23.1302	M.F.A.		CLASS	Moscow--Region I & II	Regional	traditional
ISU	Educational Leadership (Higher Ed. Admin.)	13.0401	Ed D Emp.	N/A	Education	ISU Campus	Regional	Hybrid
ISU	Electrical Apprenticeship	46.0302	AAS	N/A	Technology	ISU Campus	Regional	Face-to-Face
BSU	Associate of Arts, General	24.0101	A.A.		Arts & Sciences/ Administration	Boise	Regional	Traditional
BSU	Associate of Science, General	24.0101	A.S.		Arts & Sciences/ Administration	Boise	Regional	Traditional
CSI	Auto Body Technology	47.0603	AAS, ITC		Trade & Industry	CSI Campus	Regional	Traditional with some portion avail online
CWI	Liberal Arts	24.0101	AA	NA	Language & Arts/ No department affiliation	Nampa/Region III	Regional	Traditional, Hybrid, Online
LCSC	Liberal Arts	24.0101	AA		HUM/NS/SS	Lewiston	Regional	classroom/online
ISU	Electrical Engineering	14.1001	BS	N/A	Science and Engineering	ISU Campus	Regional	Hybrid
ISU	Elementary Education	13.1202	BA, BS	Emphases	Education	CSI Campus	Regional	Hybrid
ISU	Elementary Education	13.1202	BA, BS	Emphases	Education	ISU Campus	Regional	Hybrid
ISU	Elementary Education	13.1202	BA, BS	Emphases	Education	University Place	Regional	Hybrid
ISU	Emergency Management	43.9999	AS, BS	N/A	Technology	ISU Campus	Regional	Online
BSU	Multidisciplinary Studies	24.0102	BA		Arts & Sciences/ Administration	Boise	Regional	Traditional
CSI	Auto Body Technology, Auto Collision Repair	47.0603	BTC		Trade & Industry	CSI Campus	Regional	Traditional with some portion avail online

Institution	Program Title	CIP Code	Degree Level/ Certificate	Options/Minors/ Emphases	College/Dept.	Location(s)	Regional/ Statewide	Method of Delivery
CWI	General Education	24.0102	Academic Certificate	NA	Language & Arts	Nampa/Region III	Regional	Traditional/Hybrid
LCSC	Applied Technology	24.0102	BAS		BTS	Lewiston/Region 2	Regional	classroom
LCSC	General Studies: Business	24.0102	BA, BS		Business	LEW/CDA	Regional	classroom/online
LCSC	General Studies: Education	24.0102	BA, BS		Education and Kinesiology	Lewiston	Regional	classroom
LCSC	General Studies: Humanities	24.0102	BA, BS		Humanities	LEW/CDA	Regional	classroom/online
LCSC	General Studies: Natural Science & Math	24.0102	BA, BS		Naturals Sciences and Math	Lewiston	Regional	classroom
LCSC	General Studies: Social Sciences	24.0102	BA, BS		Social Sciences	LEW/CDA	Regional	classroom
NIC	Automotive Technology	47.0604	Adv. Tech. Cert.	N/A	Automotive Tech.	Coeur d'Alene	Region	Traditional Web Enhanced On-line Hybrid
UI	General Studies	24.0102	B.G.S.		CLASS	Moscow--Region I & II	Regional	hybrid
NIC	Automotive Technology	47.0604	A.A.S.	N/A	Automotive Tech.	Coeur d'Alene	Region	Traditional Web Enhanced On-line Hybrid
CSI	Auto Body Technology, Auto Refinishing	47.0603	BTC		Trade & Industry	CSI Campus	Regional	Traditional with some portion avail online
ISU	Emergency Management	43.9999	AS,BS	Minor	Technology	ISU Campus	Regional	
ISU	Energy Systems Electrical Engineering Technology	15.0503	AAS,BAS	N/A	Technology	ISU Campus	Regional	Hybrid
ISU	Energy Systems Instrumentation and Control Engineering Technology	15.0404	AAS	N/A	Technology	ISU Campus	Regional	Hybrid
BSU	Biology	26.0101	B.S.	Emphases: Biology; Botany; Ecology; Environmental Biology; Human Biology; Microbiology; Molecular and Cell Biology; Zoology; Secondary Education	Arts & Sciences/ Biological Sciences	Boise	Regional	Traditional
BSU	Biology	26.0101	M.A.		Arts & Sciences/ Biological Sciences	Boise	Regional	Traditional
BSU	Biology	26.0101	M.S.		Arts & Sciences/ Biological Sciences	Boise	Regional	Traditional
BSU	Biology	26.0101		Minor	Arts & Sciences/ Biological Sciences	Boise	Regional	Traditional
CSI	Automotive Service Educational Program	47.0604	AAS, BTC		Trade & Industry	CSI Campus	Regional	Traditional with some portion avail online
CSI	Bachelor of University Studies	30.9999	BUS			CSI Campus		
CSI	Biology	26.0101	AS		Biology	CSI Campus	Regional	Traditional with some portion avail online
CWI	Biology	26.0101	AS	Health Care Emphasis	STEM/Department of Life Science	Nampa/Region III	Regional	Traditional/Hybrid
CWI	Biology	26.0101	AS	Natural Resources Emphasis	STEM/Department of Life Science	Nampa/Region III	Regional	Traditional/Hybrid

Institution	Program Title	CIP Code	Degree Level/ Certificate	Options/Minors/ Emphases	College/Dept.	Location(s)	Regional/ Statewide	Method of Delivery
CWI	Biology	26.0101	AS	General	STEM/Department of Life Science	Nampa/Region III	Regional	Traditional/Hybrid
LCSC	Biology	26.0101	BA, BS		Natural Sciences and Math	Lewiston/Region 2	Regional	classroom
NIC	Aviation Flight Training - Helicopter	49.0102	AAS, ATC	N/A	CTE	Coeur d'Alene	Statewide	Traditional
UI	Biology	26.0101	B.A.; B.S.; M.S.; Ph.D.	Minor	COS	Moscow--Region I & II	Regional	Traditional
UI	Reproductive Biology	26.0101	Certificate		COS	Moscow--Region I & II	Regional	Traditional
UI	Biochemistry	26.0202	B.S.Biochem.	Minor	COS	Moscow--Region I & II	Regional	Traditional
UI	Microbiology, Molecular Biology and Biochemistry	26.0204	Ph.D.		COS	Moscow--Region I & II	Regional	Traditional
UI	Molecular Biology and Biochemistry	26.0204		Minor	COS	Moscow--Region I & II	Regional	Traditional
UI	Molecular Biology and Biotechnology	26.0204	B.S.M.B.B.		COS	Moscow--Region I & II	Regional	Traditional
ISU	Energy Systems Mechanical Engineering Technology	15.0805	AAS,BAS	N/A	Technology	ISU Campus	Regional	Hybrid
NIC	Biology, Botany, Zoology	26.0101	A.S.	N/A	Biology	Coeur d'Alene	Region	Traditional, Web Enhanced, On-line, Hybrid
ISU	Energy Systems Nuclear Operations Technology	15.1401	AAS, BAS	N/A	Technology	ISU Campus	Regional	Hybrid
ISU	Energy Systems Renewable Energy Technology	15.0503	ITC	N/A	Technology	ISU Campus	Regional	Hybrid
ISU	Energy Systems Technology	15.0303	ITC	N/A	Technology	ISU Campus	Regional	Hybrid
UI	Microbiology	26.0502	B.S.Microbiol.	Minor	COS	Moscow--Region I & II	Regional	Traditional
UI	Entomology	26.0702	M.S.; Ph.D.	Minor	CALS	Moscow--Region I & II	Regional	traditional/video link
BSU	Raptor Biology	26.0799	M.S.		Arts & Sciences/ Biological Sciences	Boise	Regional	Traditional
UI	Bioinformatics and Computational Biology	26.1103	M.S.; Ph.D.; graduate certificate		COS	Moscow--Region I & II	Regional	Traditional
UI	Ecology and Conservation Biology	26.1307	B.S.Ecol..-Cons.Biol.	Natural Resources Ecology Option; Conservation Biology Options	CNR	Moscow--Region I & II	Regional	Traditional
UI	Restoration Ecology	26.1307	Graduate Certificate		CNR	Moscow, Boise--Region I & II, Region III	Regional	Online
UI	Neuroscience	26.1501	M.S.; Ph.D.		COS	Moscow--Region I & II	Regional	Traditional
ISU	Energy Systems Wind Engineering Technology	15.0503	AAS,BAS	N/A	Technology	ISU Campus	Regional	Hybrid
ISU	Engineering and Applied Science	14.1301	Ph D	N/A	Science and Engineering	ISU Campus	Regional	Hybrid
ISU	Engineering and Applied Science	14.1301	Ph D	N/A	Science and Engineering	University Place	Regional	Hybrid
ISU	English	23.0101	BA	English, Eng/Creative Writing, Eng/Writing minors, options	Arts and Letters	ISU Campus	Regional	Hybrid
ISU	English	23.0101	MA,CERT	English, Eng/Creative Writing, Eng/Writing minors, options	Arts and Letters	ISU Campus	Regional	Face-to-Face

Institution	Program Title	CIP Code	Degree Level/ Certificate	Options/Minors/ Emphases	College/Dept.	Location(s)	Regional/ Statewide	Method of Delivery
BSU	Mathematics	27.0101	B.S.	Secondary Education Emphasis	Arts & Sciences/ Mathematics	Boise	Regional	Traditional
BSU	Mathematics	27.0101	M.S.		Arts & Sciences/ Mathematics	Boise	Regional	Traditional
BSU	Mathematics	27.0101		Minor	Arts & Sciences/ Mathematics	Boise	Regional	Traditional
CSI	Biology - Health Care	26.0101	AS		Biology	CSI Campus	Regional	Traditional with some portion avail online
LCSC	Mathematics	27.0101	BA, BS		Natural Sciences and Math	Lewiston	Regional	classroom
NIC	Bookkeeping		ITC		CAOT	Coeur d'Alene	Regional	Traditional
NIC	Business Administration	52.0201	A.S.	N/A	Business Administration	Coeur d'Alene	Region	Traditional Web Enhanced
UI	Mathematics	27.0101	B.S.; M.A.T.;M.S.; Ph.D.	Options: General; Applied-Actuarial Science and Finance; Applied-Computation; Applied-Scientific Modeling; Applied-Statistics; Minor in mathematics; Mathematical Biology	COS	Moscow--Region I & II	Regional	Traditional; Online: M.A.T.
BSU	Applied Mathematics	27.0301	B.S.		Arts & Sciences/ Mathematics	Boise	Regional	Traditional
BSU	Applied Mathematics	27.0301		Minor	Arts & Sciences/ Mathematics	Boise	Regional	Traditional
ISU	English and the Teaching of English	13.1305	Ph D	N/A	Arts and Letters	ISU Campus	Regional	Face-to-Face
UI	Process & Performance Excellence	27.0501	Certificate		COS	Moscow--Region I & II	Regional	online
UI	Statistical Science	27.0501	M.S.		COS	Moscow/Region I & II	Regional	Traditional Engineering Outreach Hybrid; On-line
UI	Statistics	27.0501	Graduate Certificate	Minor	COS	Moscow/Region I & II	Regional	Traditional Engineering Outreach Hybrid
UI	Aerospace Studies	28.0101		Minor	CLASS	Moscow--Region I & II	Regional	traditional
UI	Naval Science	28.0401		Minor	CLASS	Moscow--Region I & II	Regional	tradititional
UI	Military Science	28.0503		Minor	CLASS	Moscow--Region I & II	Regional	traditional
BSU	Military Science	29.0101		Minor	Public Service/ Military Science	Boise	Regional	Traditional
ISU	Environ Science & Management	30.0601/030104	MS	N/A	Graduate School	ISU Campus	Regional	Hybrid
ISU	Environ Science & Management	30.0601/030104	MS	N/A	Graduate School	University Place	Regional	Hybrid
CSI	Biology-Natural Resources	26.0101	AS		Biology	CSI Campus	Regional	Traditional with some portion avail online
BSU	Computational Science and Engineering	30.1001		Minor	Arts & Sciences/ Engineering	Boise		
BSU	Gerontology	30.1101		Minor	Health Sciences/ Community and Envir. Health	Boise	Regional	Traditional

Institution	Program Title	CIP Code	Degree Level/ Certificate	Options/Minors/ Emphases	College/Dept.	Location(s)	Regional/ Statewide	Method of Delivery
LCSC	Behavioral Science	30.1701	AA		Social Sciences	Lewiston	Regional	classroom
ISU	Environmental Engineering	14.1401	MS	N/A	Science and Engineering	ISU Campus	Regional	Hybrid
UI	Diversity and Stratification	30.2301	Certificate		CLASS	Moscow--Region I & II	Regional	hybyrid
ISU	Environmental Engineering	14.1401	MS	N/A	Science and Engineering	University Place	Regional	Hybrid
ISU	Environmental Science and Management	03.104	MS		Science and Engineering	ISU Campus	Regional	Face-to-Face
ISU	Experimental Psychology	42.2704	Ph D		Arts and Letters	ISU Campus	Regional	Face-to-Face
BSU	Bachelor of Applied Science	30.9999	B.A.S.		Arts & Sciences/ Administration	Boise	Regional	Traditional
BSU	Interdisciplinary Studies	30.9999	B.A., B.S.		Honor's College	Boise	Regional	Traditional
BSU	Interdisciplinary Studies	30.9999	M.A., M.S.		Arts & Sciences/ Administration	Boise	Regional	Traditional
CSI	Business Management/Entrepren	52.0701	AAS, ITC		Business	CSI Campus	Regional	Traditional with some portion avail online and/OR Online exclusively
LCSC	Interdisciplinary Studies	30.9999	BA, BS		BUS/HUM/SS/NS	Lewiston/Region 2	Regional	classroom/online
	Business Education	13.1303	A.S.	N/A	Business Administration	Coeur d'Alene	Region	
NIC	Business Leadership	51.0101	Post-Secondary	Supervision	Business Leadership	Coeur d'Alene	Region	Traditional Web Enhanced On-line Hybrid
UI	Interdisciplinary Studies	30.9999	B.A.; B.S.; M.A.; M.S.	Minor	CLASS	Moscow/CdA--Region I & 2	Regional	traditional
UI	Outdoor Recreation Leadership	31.0300		Minor	CNR	Moscow--Region I & II	Regional	Traditional, Face-to-Face
UI	Sustainable Tourism and Leisure Enterprises	31.0300		Minor	CNR	Moscow/Region I & II	Regional	Traditional, Face-to-Face
UI	Movement and Leisure Sciences	31.0301	M.S.		ED	Moscow--Region I & II	Regional	Face-to-Face
UI	Recreation	31.0301	B.S.Rec.		ED	Moscow--Region I & II	Regional	Face-to-Face
BSU	Athletic Leadership, Master of	31.0504	M.A.L.		Health Sciences/ Kinesiology	Boise	Regional	Traditional
LCSC	Sport Administration	31.0504	BA, BS		Business/ Education and Kinesiology	Lewiston	Regional	classroom/online
UI	Sport Science	31.0504		Minor	ED	Moscow/Region I & II	Regional	Face to Face
BSU	Kinesiology	31.0505	B.S.	Emphases: Kinesiology; Biomechanics; Exercise Science; Pre-Allied Health	Health Sciences/ Kinesiology	Boise	Regional	Traditional
BSU	Kinesiology	31.0505	M.K., M.S.	Emphases: Kinesiology; Behavioral Studies; Biophysical Studies; Socio-historical Studies	Health Sciences/ Kinesiology	Boise	Regional	Traditional

Institution	Program Title	CIP Code	Degree Level/ Certificate	Options/Minors/ Emphases	College/Dept.	Location(s)	Regional/ Statewide	Method of Delivery
LCSC	Exercise Science	31.0505	BA, BS		Education and Kinesiology/ Natural Sciences and Math	Lewiston	Regional	classroom
LCSC	Kinesiology	31.0505	BA, BS		Education and Kinesiology	Lewiston	Regional	classroom
UI	Exercise Science and Health	31.0505	B.S.E.S.H.	Program Tracks: 1) Fitness, Health, and Human Performance; 2) Pre-physical Therapy; 3) Pre-athletic training; 4) physical education teacher certification	ED	Moscow--Region I & II	Regional	Face-to-Face
CSI	Business, General	52.0201	AA		Business	CSI Campus	Regional	Traditional with some portion avail online and/OR Online exclusively
NIC	Business Leadership	52.0101	Post-Secondary	General Business	Business Leadership	Coeur d'Alene	Region	Traditional Web Enhanced On-line Hybrid
BSU	Sustainability	33.3301		Minor	Business & Economics/ Economics	Boise	Regional	Traditional
UI	Professional Writing	36.0118		Minor	CLASS	Moscow/Region I & II	Regional	traditional
ISU	Family and Consumer Sciences	13.1308	BA, BS	Consumer Economics, Family and Consumer Sciences minors	Education	ISU Campus	Regional	Face-to-Face
BSU	Philosophy	38.0101	B.A.		Arts & Sciences/ Philosophy	Boise	Regional	Traditional
BSU	Philosophy	38.0101		Minor	Arts & Sciences/ Philosophy	Boise	Regional	Traditional
NIC	Business Leadership	52.0101	Post-Secondary	Leadership	Business Leadership	Coeur d'Alene	Region	Traditional Web Enhanced On-line Hybrid
UI	Bioethics	38.0101		Minor	CLASS	Moscow--Region I & II	Regional	traditional
UI	Philosophy	38.0101	B.A.; B.S.; M.A.	Minor	CLASS	Moscow--Region I & II	Regional	hybrid
UI	Global Justice	38.0104	Certificate		CLASS	Moscow--Region I & II	Regional	hybrid/study abroad
UI	Professional Ethics	38.0104	Certificate		CLASS	Moscow--Region I & II	Regional	hybrid
UI	Religious Studies	38.0201		Minor	CLASS	Moscow--Region I & II	Regional	traditional
BSU	Chemistry	40.0401		Minor	Arts & Sciences/ Chemistry & Biochemistry	Boise	Regional	Traditional
ISU	Family Practice Residency	60.0218	Cert of Completion	N/A	Division of Health Sciences	ISU Campus	Regional	Hybrid
ISU	Finance	52.0801	BBA	Emphasis	Business	ISU Campus	Regional	Face-to-Face

Institution	Program Title	CIP Code	Degree Level/ Certificate	Options/Minors/ Emphases	College/Dept.	Location(s)	Regional/ Statewide	Method of Delivery
BSU	Chemistry	40.0501	B.S.	Emphases: Chemistry, ACS certified Biochemistry; Biochemistry; Forensics; ACS Certified Professional; Secondary Education	Arts & Sciences/ Chemistry & Biochemistry	Boise	Regional	Traditional
BSU	Chemistry	40.0501	M.S.		Arts & Sciences/ Chemistry & Biochemistry	Boise	Regional	Traditional
CSI	Cabinetmaking/Woodworking	48.0703	AAS, ITC		Trade & Industry	CSI Campus	Regional	Traditional with some portion avail online
LCSC	Chemistry	40.0501	BA, BS	Geochemistry Emphasis / minor	Naturals Sciences and Math	Lewiston	Regional	classroom
NIC	Business Leadership	52.0101	Post-Secondary	Foundation	Business Leadership	Coeur d'Alene	Region	Traditional Web Enhanced On-line Hybrid
UI	Chemistry	40.0501	B.S.; M.S.; Ph.D.	Minor; Options: 1) General; 2) Professional; 3) Premedical; 4) Forensics;	COS	Moscow--Region I & II	Regional	Lecture/lab
ISU	Fire Service Administration (Fully Online)	43.0203	AS	N/A	Technology	ISU Campus	Regional	Online
ISU	Fire Service Administration (Fully Online)	43.0203	BS	N/A	Technology	ISU Campus	Regional	Online
ISU	French	16.0901	BA		Arts and Letters	ISU Campus	Regional	Hybrid
BSU	Earth Sciences	40.0601	M.ESci.		Arts & Sciences/ Geosciences	Boise	Regional	Traditional
BSU	Geosciences	40.0601	M.S.		Arts & Sciences/ Geosciences	Boise	Regional	Traditional
BSU	Geosciences	40.0601	B.S.	Emphases: Geosciences; Geology; Hydrology; Geophysics; Secondary Education	Arts & Sciences/ Geosciences	Boise	Regional	Traditional
BSU	Geosciences	40.0601	Ph.D.		Arts & Sciences/ Geosciences	Boise	Regional	Traditional
CSI	Chemistry	40.0501	AS		Physical Science	CSI Campus	Regional	Traditional with some portion avail online
CWI	Geology	40.0601	AS	NA	STEM/ Department of Physical Science	Nampa/Region III	Regional	Traditional/Hybrid
LCSC	Earth Science	40.0601	BA, BS		Naturals Sciences and Math	Lewiston	Regional	classroom
NIC	Business Leadership	52.0101	Post-Secondary	Quality	Business Leadership	Coeur d'Alene	Region	Traditional Web Enhanced On-line Hybrid

Institution	Program Title	CIP Code	Degree Level/ Certificate	Options/Minors/ Emphases	College/Dept.	Location(s)	Regional/ Statewide	Method of Delivery
UI	Geological Sciences	40.0601	B.S.	Options: 1) General Geology; 2) Hydrogeology; 3)Resource Exploration; 4) Environmental Geology; 5)Geological Education; 6) Structural Geology & Tectonics	COS	Moscow--Region I & II	Regional	Traditional
UI	Geology	40.0601	M.S; Ph.D.	Minor	COS	Moscow--Region I & II	Regional	Traditional
ISU	General Business	52.0101	BBA	Emphasis	Business	ISU Campus	Regional	Face-to-Face
ISU	General Business	52.0101	BBA	Emphasis	Business	University Place	Regional	Face-to-Face
BSU	Geophysics	40.0603	M.S.		Arts & Sciences/ Geosciences	Boise	Regional	Traditional
BSU	Geophysics	40.0603	Ph.D.		Arts & Sciences/ Geosciences	Boise	Regional	Traditional
BSU	Hydrologic Sciences	40.0605	M.S.		Arts & Science/ Geosciences Engineering/ Civil Engineering	Boise	Regional	Traditional
ISU	General Interdisciplanary	30.0000	MNS, MS, MA, M Ed	N/A	Graduate School	ISU Campus	Regional	Hybrid
ISU	General Interdisciplanary	30.0000	MS	N/A	Graduate School	University Place	Regional	Hybrid
ISU	General Studies	24.0102	BA	N/A	Arts and Letters	CSI Campus	Regional	Hybrid
ISU	General Studies	24.0102	AA	N/A	Arts and Letters	ISU Campus	Regional	Hybrid
BSU	Geographic Information Analysis	40.0699	Graduate Certificate		Arts & Sciences/ Geosciences	Boise	Regional	Traditional
BSU	Geospatial Information Analysis	40.0699		Minor	Arts & Sciences/ Geosciences	Boise	Regional	Traditional
ISU	General Studies	24.0102	BA	N/A	Arts and Letters	ISU Campus	Regional	Hybrid
ISU	General Studies	24.0102	AA	N/A	Arts and Letters	University Place	Regional	Hybrid
ISU	General Studies	24.0102	BA	N/A	Arts and Letters	University Place	Regional	Hybrid
ISU	Geographic Information Systems (GIS)	40.0699	MS	N/A	Science and Engineering	ISU Campus	Regional	Hybrid
ISU	Geology	40.0601	BA, BS	Emphasis	Science and Engineering	ISU Campus	Regional	Hybrid
ISU	Geology	40.0601	MNS, MS	Emphasis	Science and Engineering	ISU Campus	Regional	Hybrid
BSU	Physics	40.0801	B.S.	Emphases: Physics; Applied Physics; Biophysics; Secondary Education; Astrophysics	Arts & Sciences/ Physics	Boise	Regional	Traditional
BSU	Physics	40.0801		Minor	Arts & Sciences/ Physics	Boise	Regional	Traditional
CSI	Communication	9.0100	AA		Social Science	CSI Campus	Regional	Traditional with some portion avail online
NIC	Business Leadership	52.0101	Post-Secondary	Management	Business Leadership	Coeur d'Alene	Region	Traditional Web Enhanced On-line Hybrid

Institution	Program Title	CIP Code	Degree Level/ Certificate	Options/Minors/ Emphases	College/Dept.	Location(s)	Regional/ Statewide	Method of Delivery
UI	Physics	40.0801	B.S.; B.A.; M.S.; Ph.D.	Minor; Emphasis: 1)General Physics; 2) Applied Physics	COS	Moscow--Region I & II	Regional	Live lecture/live video
EITC	Radiation Safety Technologies	41.0299	RDS.ITC	Program started again Fall 2015	Radiation Safety Technologies	Idaho Falls, ID	Regional	Lecture/Lab
ISU	Geomatics Technology	15.1102	BS	N/A	Technology	ISU Campus	Regional	Hybrid
ISU	Geosciences	40.0601	Ph D		Science and Engineering	ISU Campus	Regional	Hybrid
BSU	Psychology	42.0101	B.S.		Arts & Sciences/ Psychology	Boise	Regional	Traditional
BSU	Psychology	42.0101		Minor	Arts & Sciences/ Psychology	Boise	Regional	Traditional
CSI	Criminal Justice	43.0104	BA, BS		Soc Sci & Public Affairs	BSU Campus		
CWI	Psychology	42.0101	AA	NA	Social Sciences and Public Affairs/Department of Social and Human Relations	Nampa/Region III	Regional	Traditional/Hybrid
LCSC	Psychology	42.0101	BA, BS		Social Sciences	Lewiston	Regional	classroom
NIC	Business Leadership	52.0101	Post-Secondary	HR Management	Business Leadership	Coeur d'Alene	Region	Traditional Web Enhanced On-line Hybrid
UI	Addictions	42.0101		Minor	CLASS	Moscow/CdA--Regional I & Region II	Regional	Hybrid
UI	Psychology	42.0101	B.A.; B.S.; M.S.	Minor	CLASS	Moscow--Region I & II	Regional	hybrid; On-line: M.S.
ISU	Geotechnology	40.0699	PB Cert, Minor	N/A	Science and Engineering	ISU Campus	Regional	Hybrid
UI	Experimental Psychology	42.2704	Ph.D.		CLASS	Moscow--Region I & II	Regional	traditional, hybrid
ISU	Geotechnology	40.0699	PB Cert, Minor	N/A	Science and Engineering	University Place	Regional	Hybrid
ISU	German	16.0501	BA		Arts and Letters	ISU Campus	Regional	Face-to-Face
BSU	Criminal Justice	43.0103	B.S.		Public Service/ Criminial Justice	Twin Falls	Regional	Traditional
BSU	Criminal Justice	43.0103	A.S.		Public Service/ Criminial Justice	Boise	Regional	Traditional
BSU	Criminal Justice	43.0103	B.S.		Public Service/ Criminial Justice	Boise	Regional	Traditional
BSU	Criminal Justice	43.0103	M.A.		Public Service/ Criminial Justice	Boise	Regional	Traditional
ISU	Graphic Arts/Printing Technology	10.0303	BAS	N/A	Technology	ISU Campus	Regional	Face-to-Face
CSI	Criminal Justice Administration	43.0104	AA	Criminal Justice, Correction Specialist	Social Science	CSI Campus	Regional	Traditional with some portion avail online and/OR Online exclusively
CSI	Dance	50.0301	AA		Fine Arts	CSI Campus	Regional	Traditional with some portion avail online
CWI	Criminal Justice	43.0104	AA	NA	Social Sciences and Public Affairs/Department of Social and Human Relations	Nampa/Region III	Regional	Traditional, Hybrid, Online
LCSC	Justice Studies	43.0104	BA, BS		Social Sciences	Lewiston	Regional	classroom

Institution	Program Title	CIP Code	Degree Level/ Certificate	Options/Minors/ Emphases	College/Dept.	Location(s)	Regional/ Statewide	Method of Delivery
NIC	Business Leadership	52.0101	Post-Secondary	Med/Health Care	Business Leadership	Coeur d'Alene	Region	Traditional Web Enhanced On-line Hybrid
UI	Justice Studies	43.0104		Minor	CLASS	Moscow--Region I & II	Regional	traditional
ISU	Health Care Administration	51.0701	BS	N/A	Division of Health Sciences	ISU Campus	Regional	Hybrid
CSI	Dental Assistant	51.0601	AAS, ITC		Health Science & Human Services	CSI Campus	Regional	Traditional with some portion avail online
CWI	Law Enforcement	43.0107	AAS, ITC, BTC	NA	Professional Technical Education	Nampa/Region III	Regional	Traditional
NIC	Business Leadership	52.0101	A.A.S.	N/A	Business Leadership	Coeur d'Alene	Region	Traditional Web Enhanced On-line Hybrid
NIC	Business Leadership	52.0101	Post-Secondary	Entrepreneurship	Computer App/Office Tech	Coeur d'Alene	Region	Traditional Web Enhanced On-line Hybrid
NIC	Business Leadership	52.0408	Post-Secondary	Comptr Apps	Business Leadership	Coeur d'Alene	Region	Traditional Web Enhanced On-line Hybrid Self-Paced
NIC	Carpentry	46.0201	Tech. Certificate	N/A	Carpentry	Coeur d'Alene	Region	Traditional Web Enhanced On-line Hybrid
BSU	Victim Services	43.0199	Graduate Certificate		Public Service/ Criminial Justice	Boise	Regional	On-line
CSI	Dental Hygiene	51.0602	AAS		Health Science & Human Services	CSI Campus	Regional	Traditional with some portion avail online
ISU	Health Care Informatics	51.2706	BBA		Business	ISU Campus	Regional	Face-to-Face
ISU	Health Education	13.1307	MHE	N/A	Division of Health Sciences	ISU-Meridian Ctr	Statewide	Hybrid
CWI	Fire Service Tech	43.0203	AAS	NA	Professional Technical Education	Nampa/Region III	Regional	Traditional
CWI	Wildland Fire Management	43.0203	AAS	NA	Professional Technical Education	Nampa/Region III	Regional	Traditional
LCSC	Fire Service Technology	43.0203	AAS, BAS		BTS	Lewiston/Region 2	Regional	classroom
NIC	Carpentry Management Tech	46.0201	A.A.S.	N/A	Carpentry	Coeur d'Alene	Region	Traditional Web Enhanced On-line Hybrid Self-Paced
UI	Emergency Planning and Management	43.0302	Certificate		ENGR	Idaho Falls	Regional	on-campus and outreach, compressed video
ISU	Health Education	51.2207	BA, BS	Health Education Teacher, Health Education Non-	Education	ISU Campus	Regional	Hybrid
ISU	Health Education	51.2207	MHE	Health Education Teacher, Health Education Non-	Education	ISU Campus	Statewide	Online

Institution	Program Title	CIP Code	Degree Level/ Certificate	Options/Minors/ Emphases	College/Dept.	Location(s)	Regional/ Statewide	Method of Delivery
ISU	Health Education	51.2207	MHE	Health Education Teaching, Health Education Non-teaching minors, option, emphases	Division of Health Sciences	CSI Campus	Statewide	Online
BSU	Public Administration	44.0401	M.P.A.	Emphases: General Public Administration;	Public Service/ Public Policy and Adminstration	Boise	Statewide	Traditional
BSU	Public Policy and Administration	44.0401	Ph.D.		Public Service/ Public Policy and Adminstration	Boise	Statewide	Traditional
UI	Public Administration	44.0401	M.P.A.		CLASS	Moscow--Region I & II	Regional	traditional
UI	Public Administration and Policy	44.0401		Minor	CLASS	Moscow--Region I & II	Regional	traditional
ISU	Health Information Technology	51.0707	BTC,AAS,BAS	N/A	Technology	ISU Campus	Regional	Hybrid
BSU	Social Work	44.0701	B.A.		Health Sciences/ School of Social Work	Boise	Regional	Traditional
BSU	Social Work	44.0701	B.A.		Health Sciences/ School of Social Work	Twin Falls	Regional	Traditional
BSU	Social Work	44.0701	M.S.W.		Health Sciences / School of Social Work	Boise	Statewide	Traditional
BSU	Social Work	44.0701	M.S.W.		Health Sciences/ School of Social Work	Boise	Statewide	On-line
BSU	Social Work	44.0701	M.S.W.		Health Sciences School of Social Work	Lewiston, Coeur d'Alene	Statewide	Traditional
BSU	Social Work	44.0701	M.S.W.		Health Sciences/ School of Social Work	Twin Falls	Statewide	Traditional
CSI	Diesel Technology	47.0605	AAS, ITC		Trade & Industry	CSI Campus	Regional	Traditional with some portion avail online
LCSC	Social Work	44.0701	BA, BS		Social Sciences	LEW/CDA	Regional	classroom
NIC	Chemistry	40.0501	A.S.	N/A	Chemistry	Coeur d'Alene	Region	Traditional, Web Enhanced, On-line, Hybrid
BSU	Refugee Services	44.0799	Graduate Certificate		Health Science/ School of Social Work	Boise	Regional	Traditional
BSU	Refugee Services	44.0799	Certificate, Undergraduate		Health Science/ School of Social Work	Boise	Regional	Traditional
BSU	Refugee Studies	44.0799		Minor	Arts & Sciences/ History	Boise	Regional	Traditional
BSU	Social Science	45.0101	A.A.		Arts & Sciences/ Sociology	Boise	Regional	Traditional
BSU	Social Science	45.0101	B.S.		Arts & Sciences/ Sociology	Boise	Regional	Traditional
LCSC	Social Sciences	45.0101	BA, BS		Social Sciences	Lewiston	Regional	classroom
ISU	Health Physics	40.0801	AS	Emphasis	Science and Engineering	ISU Campus	Regional	Face-to-Face
ISU	Health Physics	40.0801	MNS, MS	Emphasis	Science and Engineering	ISU Campus	Regional	Face-to-Face

Institution	Program Title	CIP Code	Degree Level/ Certificate	Options/Minors/ Emphases	College/Dept.	Location(s)	Regional/ Statewide	Method of Delivery
BSU	Anthropology	45.0201	B.S.		Arts & Sciences/ Anthropology	Boise	Regional	Traditional
BSU	Anthropology	45.0201		Minor	Arts & Sciences/ Anthropology	Boise	Regional	Traditional
BSU	Anthropology	45.0201	M.A.		Arts & Sciences/ Anthropology	Boise	Regional	Traditional
BSU	Anthropology, Applied	45.0201	M.A.A.		Arts & Sciences/ Anthropology	Boise	Regional	Traditional
CSI	Economics	45.0601	AA	Business, Social Science	Business	CSI Campus	Regional	Traditional with some portion avail online and/OR Online exclusively
CWI	Anthropology	45.0201	AA	NA	Social Sciences and Public Affairs/Department of Culture, History, and Politics	Nampa/Region III	Regional	Traditional/Hybrid
NIC	Child Development	19.0706	A.S.	N/A	Child Development	Coeur d'Alene	Region	Traditional Web Enhanced On-line Hybrid
UI	Anthropology	45.0201	B.A.; B.S.; M.A.	Minor	CLASS	Moscow--Region I & II	Regional	traditional
UI	Archaeological Technician	45.0301	Certificate		CLASS	Moscow--Region I & II	Regional	traditional
ISU	Health Physics	40.0801	AS	Emphasis	Science and Engineering	University Place	Regional	Face-to-Face
BSU	Economics	45.0601	B.A.	Emphases: Economics; Quantitative	Business & Economics/ Economics	Boise	Regional	Traditional
BSU	Economics	45.0601		Minor	Business & Economics/ Economics	Boise	Regional	Traditional
CSI	Education, Early Childhood Education	19.0708	AA, AAS,ITC, BTC, BTC CDA		Education	CSI Campus	Regional	Traditional with some portion avail online and/OR only Online exclusively
UI	Economics	45.0601	B.A.; B.S.	Minor	CLASS	Moscow--Region I & II	Regional	traditional
CSI	Emergency Medical Technician	51.0904	ITC, BTC, ATC		Health Science & Human Services	CSI Campus	Regional	Traditional with some portion avail online
CWI	Geography	45.0701	AA	NA	Social Sciences and Public Affairs/ Department of Culture, History, and Politics	Nampa/Region III	Regional	Traditional, Hybrid, Online
UI	Climate Change	45.0701		Minor	COS	Moscow--Region I & II	Regional	In person
UI	Geographic Information Systems	45.0701	Certificate		COS	Moscow, CdA, Boise--Region I & II, Region III	Regional	In-person, CV, web
UI	Geography	45.0701	B.S.; M.S.; Ph.D.		COS	Moscow--Region I & II	Regional	In-person
LCSC	Engineering Technology GIS	45.0702	BAS, BAT AAS		TI	Lewiston	Regional	classroom
UI	Comparitive/International Politics	45.0901		Minor	CLASS	Moscow--Region I & II	Regional	traditional
UI	International Political Economy	45.0901		Minor	CLASS	Moscow--Region I & II	Regional	Face to face
UI	International Studies	45.0901	B.A.	Minor	CLASS	Moscow--Region I & II	Regional	hybrid/study abroad
ISU	Health Science	51.0000	BS	N/A	Division of Health Sciences	ISU Campus	Regional	Hybrid

Institution	Program Title	CIP Code	Degree Level/ Certificate	Options/Minors/ Emphases	College/Dept.	Location(s)	Regional/ Statewide	Method of Delivery
ISU	Historical Resources Management	54.0105	MA	GIS Track, Digital Media Track	Arts and Letters	ISU Campus	Regional	Hybrid
ISU	History	54.0101	BA		Arts and Letters	ISU Campus	Regional	Hybrid
BSU	Political Science	45.1001	B.S.	Emphases: Political Science; American Govt and Public Policy; International Relations and Comparative Politics; Public Law and Political Philosophy	Public Service/ Political Science	Boise	Regional	Traditional
BSU	Political Science	45.1001	M.A.		Public Service/ Political Science	Boise	Regional	Traditional
BSU	Political Science	45.1001		Minor	Public Service/ Political Science	Boise	Regional	Traditional
CSI	English	23.0101	AA		English, Lanugage & Philosophy	CSI Campus	Regional	Traditional with some portion avail online
CWI	Political Science	45.1001	AA	NA	Social Sciences and Public Affairs/ Department of Culture, History, and Politics	Nampa/Region III	Regional	Traditional, Hybrid, Online
NIC	Child Development	19.0706	Associate Cert.	N/A	Child Development	Coeur d'Alene	Region	Traditional Web Enhanced On-line Hybrid
UI	Political Science	45.1001	B.A.; B.S.; M.A.; Ph.D.	Minor	CLASS	Moscow--Region I & II	Regional	traditional
UI	American Government/Public Law	45.1002		Minor	CLASS	Moscow--Region I & II	Regional	traditional
ISU	Human Exceptionality	13.1205	BS, BA	Deaf Education minor	Education	ISU Campus	Regional	Hybrid
ISU	Human Exceptionality	13.1205	Med	Deaf Education minor	Education	ISU Campus	Regional	Hybrid
ISU	Hydrology	40.0603	MS		Science and Engineering	ISU Campus	Regional	Hybrid
BSU	Sociology	45.1101	B.S.		Arts & Sciences/ Sociology	Boise	Regional	Traditional
BSU	Sociology	45.1101		Minor	Arts & Sciences/ Sociology	Boise	Regional	Traditional
CSI	Equine Business Management	1.0199	AS		Agriculture	CSI Campus	Regional	Traditional with some portion avail online
CWI	Sociology	45.1101	AA	NA	Social Sciences and Public Affairs/Department of Social and Human Relations	Nampa/Region III	Regional	Traditional/Hybrid
NIC	Collision Repair Tech	47.0603	Tech. Certificate	N/A	Auto Collision Repair	Coeur d'Alene	Region	Traditional Web Enhanced On-line Hybrid
UI	Sociology	45.1101	B.A.; B.S.	Minor; Emphsis: 1) Criminology; 2) Inequalities & Globalization; 3) General;	CLASS	Moscow/Region I & II	Regional	hybrid

Institution	Program Title	CIP Code	Degree Level/ Certificate	Options/Minors/ Emphases	College/Dept.	Location(s)	Regional/ Statewide	Method of Delivery
NIC	Communication	9.0101	A.A.	Speech	Communication	Coeur d'Alene	Region	Traditional Web Enhanced On-line Hybrid
NIC	Communication	9.0101	A.A.	Journalism	Communication	Coeur d'Alene	Region	Traditional Web Enhanced On-line Hybrid
ISU	Idaho Advanced General Dentistry Prog.	60.0199	Post-Doc. Cert	N/A	Division of Health Sciences	ISU Campus	Regional	Face-to-Face
LCSC	Electrical Apprenticeship	46.0302	BAS, AAS		TI/WFT	Lewiston	Regional	classroom
ISU	Idaho Advanced General Dentistry Prog.	60.0199	Post-Doc. Cert	N/A	Division of Health Sciences	ISU-Meridian Ctr	Regional	Face-to-Face
LCSC	Plumbing Apprenticeship	46.0503	BAS, AAS		TI/WFT	Lewiston	Regional	classroom
ISU	Idaho Dental Education Program	60.0199	Coop. Trans.	N/A	Division of Health Sciences	ISU Campus	Regional	Face-to-Face
LCSC	Industrial Electronics	47.0105	BAS, AAS, ATC, ITC		TI	Lewiston	Regional	classroom
CSI	Equine Horse Management	1.0507	AAS, ITC		Agriculture	CSI Campus	Regional	Traditional with some portion avail online
LCSC	Heating Air Conditioning & Appliance Tech	47.0201	BAS, AAS, ATC, ITC		TI	Lewiston	Regional	classroom
NIC	Computer Aided Design Tech	48.0101	Tech. Certificate, BTC	Architectural Design	Computer Aided Design	Coeur d'Alene	Region	Traditional, Web Enhanced, On-line Hybrid, Self-Paced
NIC	Computer Aided Design Tech	48.0101	Adv. Tech. Cert.	Architectural Design	Computer Aided Design	Coeur d'Alene	Region	Traditional, Web Enhanced, On-line Hybrid, Self-Paced
CWI	Heavy Equipment Technician	47.0399	AAS, ATC, ITC, BTC	NA	Professional Technical Education	Nampa/Region III	Regional	Traditional
ISU	Informatics	11.0104	BBA, CERT		Business	ISU Campus	Regional	Face-to-Face
CSI	Equine Studies	1.0507	AA		Agriculture	CSI Campus	Regional	Traditional with some portion avail online
CSI	Fire Service Technology	43.0201	AAS		Workforce Training	CSI Campus	Regional	Traditional with some portion avail online
CSI	Food Processing Technology	1.1002	AAS, ITC	Controls, Operations, QA/QC	Agriculture	CSI Campus	Regional	Traditional
CWI	Auto Body	47.0603	AAS, ATC, ITC, BTC	NA	Professional Technical Education	Nampa/Region III	Regional	Traditional
LCSC	Collision Repair	47.0603	BAS, AAS, ATC, ITC		TI	Lewiston	Regional	classroom
NIC	Computer Aided Design Tech	48.0101	A.A.S.	Architectural Design	Computer Aided Design	Coeur d'Alene	Region	Traditional, Web Enhanced, On-line Hybrid, Self-Paced
ISU	Information Technology Systems	11.0901	ITC,ATC,AAS,BAS	N/A	Technology	ISU Campus	Regional	Face-to-Face
CSI	General Business	52.0201	BBA, BA, BS		Business & Economics	BSU Campus		
CWI	Automotive Technology	47.0604	AAS, ATC, ITC, BTC	NA	Professional Technical Education	Nampa/Region III	Regional	Traditional
LCSC	Auto Mechanics Technology	47.0604	BAS, AAS, ATC, ITC		TI	Lewiston	Regional	classroom
NIC	Computer Aided Design Tech	48.0101	Tech. Certificate, BTC	Civil Design	Computer Aided Design	Coeur d'Alene	Region	Traditional, Web Enhanced, On-line Hybrid, Self-Paced

Institution	Program Title	CIP Code	Degree Level/ Certificate	Options/Minors/ Emphases	College/Dept.	Location(s)	Regional/ Statewide	Method of Delivery
NIC	Computer Aided Design Tech	48.0101	Adv. Tech. Cert.	Civil Design	Computer Aided Design	Coeur d'Alene	Region	Traditional, Web Enhanced, On-line Hybrid, Self-Paced
NIC	Computer Aided Design Tech	48.0101	A.A.S.	Civil Design	Computer Aided Design	Coeur d'Alene	Region	Traditional, Web Enhanced, On-line Hybrid, Self-Paced
NIC	Computer Aided Design Tech	48.0101	Tech. Certificate, BTC	Mechanical	Computer Aided Design	Coeur d'Alene	Region	Traditional, Web Enhanced, On-line Hybrid, Self-Paced
ISU	Instructional Design	13.0501	Ph D	N/A	Education	ISU Campus	Regional	Hybrid
CSI	General Studies	24.0102	BA		Arts & Letters	CSI Campus		Regional
CWI	Heavy Duty Truck Technician	47.0605	AAS, ATC, ITC, BTC	NA	Professional Technical Education	Nampa/Region III	Regional	Traditional
CWI	Western States CAT Technician	47.0605	AAS, ATC	NA	Professional Technical Education	Nampa/Region III	Regional	Traditional
EITC	Diesel Engine Specialist	47.0605	DTS.BTC	N/A	Diesel Technologies	Idaho Falls, ID	Regional	Lecture/Lab
EITC	Diesel Fuel Injection Specialist	47.0605	DTF.BTC	N/A	Diesel Technologies	Idaho Falls, ID	Regional	Lecture/Lab
EITC	Diesel Heavy Duty Brake Specialist	47.0605	DTB.BTC	N/A	Diesel Technologies	Idaho Falls, ID	Regional	Lecture/Lab
EITC	Diesel Heavy Duty Dr Train Specialist	47.0605	DTD.BTC	N/A	Diesel Technologies	Idaho Falls, ID	Regional	Lecture/Lab
EITC	Diesel Heavy Duty Electrical System	47.0605	DTE.BTC	N/A	Diesel Technologies	Idaho Falls, ID	Regional	Lecture/Lab
EITC	Diesel Technology	47.0605	DT.AAS	N/A	Diesel Technologies	Idaho Falls, ID	Regional	Lecture/Lab
EITC	Diesel Technology	47.0605	DT.ATC	N/A	Diesel Technologies	Idaho Falls, ID	Regional	Lecture/Lab
LCSC	Diesel Technology	47.0605	BAS, AAS, ATC, ITC		TI	Lewiston	Regional	classroom
NIC	Computer Aided Design Tech	48.0101	Adv. Tech. Cert.	Mechanical	Computer Aided Design	Coeur d'Alene	Region	Traditional, Web Enhanced, On-line Hybrid, Self-Paced
NIC	Computer Aided Design Tech	48.0101	A.A.S.	Mechanical	Computer Aided Design	Coeur d'Alene	Region	Traditional, Web Enhanced, On-line Hybrid, Self-Paced
NIC	Computer Applications	52.0499	BTC	N/A	Computer App/Office Tech	Coeur d'Alene	Region	Traditional, Web Enhanced,On-line Hybrid, Self-Paced
NIC	Computer Information Tech	52.1201	Adv. Tech. Cert.	N/A	Computer Information Tech.	Coeur d'Alene	Region	Traditional, Web Enhanced, On-line Hybrid, Self-Paced
NIC	Criminal Justice	43.0104	A.A.	N/A	Criminal Justice	Coeur d'Alene	Region	Traditional Web Enhanced On-line Hybrid
CWI	Power sports and Small Engine Repair Technology	47.0606	AAS, ATC, ITC, BTC	NA	Professional Technical Education	Nampa/Region III	Regional	Traditional
ISU	Instructional Technology	13.0501	M Ed	N/A	Education	ISU Campus	Regional	Hybrid
NIC	Culinary Arts (Inactive)	12.0508	ITC, AAS	N/A	Culinary Arts	Coeur d'Alene	Region	Traditional, Web Enhanced, On-line Hybrid
NIC	Diesel Technology (need to inactivate or discontinue)	47.0605	Post Secondary	N/A	Diesel Technology	Coeur d'Alene	Region	Classes not offered but left active by request

Institution	Program Title	CIP Code	Degree Level/ Certificate	Options/Minors/ Emphases	College/Dept.	Location(s)	Regional/ Statewide	Method of Delivery
ISU	Instrumentation and System Automation Asst.	15.0404	ITC,BAS	N/A	Technology	ISU Campus	Regional	Hybrid
ISU	Instrumentation Tech.: Industrial Controls	15.0404	AAS, BAS	N/A	Technology	ISU Campus	Regional	Hybrid
NIC	Diesel Technology	47.0605	Tech. Certificate	N/A	Diesel Technology	Coeur d'Alene	Region	Traditional, Web Enhanced, On-line Hybrid
NIC	Diesel Technology	47.0605	Adv. Tech. Cert.	N/A	Diesel Technology	Coeur d'Alene	Region	Traditional, Web Enhanced, On-line Hybrid
NIC	Diesel Technology	47.0605	A.A.S.	N/A	Diesel Technology	Coeur d'Alene	Region	Traditional, Web Enhanced, On-line Hybrid
NIC	Electrical Systems	47.0605	Post-Secondary	Basic	Diesel Technology	Coeur d'Alene	Region	Classes not offered but still left active by request. See Diesel Technology Post Secondary
NIC	Electronic Med. Records IT Support (inactive, needs to be discontinued)	52.0404	Post-Secondary	N/A	Computer App/Office Tech	Coeur d'Alene	Region	Internet
NIC	Electronic Medical Records (inactive, needs to be discontinued)	52.0404	Post-Secondary	Health Care	Computer App/Office Tech	Coeur d'Alene	Region	Internet Self-paced
NIC	Emergency Medical Services	51.0904	ITC, AAS	N/A	Health Professions	Coeur d'Alene	Region	Traditional
NIC	English	23.0101	A.A.	N/A	English	Coeur d'Alene	Region	Traditional Web Enhanced On-line Hybrid
NIC	Environmental Sciences	3.0101	A.S.	N/A	Biology	Coeur d'Alene	Region	Traditional Web Enhanced On-line Hybrid
NIC	Fire Service Technology	43.0203	A.A.S.	N/A	Fire Service	Coeur d'Alene	Region	Traditional Web Enhanced On-line Hybrid
CWI	Machine Tool Technology	48.0501	AAS, ATC, ITC, BTC	NA	Professional Technical Education	Nampa/Region III	Regional	Traditional
EITC	Machine Tool Technology	48.0501	MTT.AAS/ATC	N/A	Mechanical Trades	Idaho Falls, Idaho	Regional	Lecture/Lab
NIC	Forestry/Wildlife/Range Managemnt	3.0101	A.S.	N/A	Biology	Coeur d'Alene	Region	Traditional, Web Enhanced, On-line Hybrid
NIC	General Studies	24.0102	A.A.	N/A	N/A	Coeur d'Alene	Region	Traditional, Web Enhanced, On-line Hybrid

Institution	Program Title	CIP Code	Degree Level/ Certificate	Options/Minors/ Emphases	College/Dept.	Location(s)	Regional/ Statewide	Method of Delivery
NIC	Geology	40.0601	A.S.	N/A	Geology	Coeur d'Alene	Region	Traditional, Web Enhanced, On-line Hybrid
NIC	Graphic Design	50.0409	ITC, ATC, A.A.S.	N/A	Graphic Design	Post Falls	Region	Traditional Web Enhanced On-line Hybrid
ISU	International Studies	30.2001	BA	International Studies minor, emphases	Arts and Letters	ISU Campus	Regional	Face-to-Face
CSI	Geography	45.0701	AA		Social Science	CSI Campus	Regional	Traditional with some portion avail online
CWI	Heavy Equipment Welding and Fabrication	48.0508	AAS, ATC	NA	Professional Technical Education	Nampa/Region III	Regional	Traditional
CWI	Welding & Metals Fabrication	48.0508	AAS, ATC, BTC	NA	Professional Technical Education	Nampa/Region III	Regional	Traditional
LCSC	Welding Technology	48.0508	BAS, AAS, ATC, ITC		TI	Lewiston	Regional	classroom
NIC	Health Information Fundamentals	51.0707	ITC	N/A	Computer App/Office Tech	Coeur d'Alene	Region	Traditional, Web Enhanced, On-line Hybrid, Self-Paced
NIC	Heating, Ventilation, Air Conditioning (need to inactivate or discontinue)	47.0201	Tech. Certificate	N/A	Heating, Ventilation, Air Cond.	Coeur d'Alene	Region	Traditional Web Enhanced On-line Hybrid
NIC	History	54.0101	A.A.	N/A	History	Coeur d'Alene	Region	Traditional Web Enhanced On-line Hybrid
NIC	Hospitality Management	52.0901	AAS, ATC, ITC	N/A		Coeur d'Alene	Region	
ISU	Interprofessional Geriatric		PB Cert		Division of Health Sciences	ISU Campus	Regional	
CSI	Geology	40.0601	AS		Physical Science	CSI Campus	Regional	Traditional with some portion avail online
NIC	Humanities	24.0103	A.S.	N/A	Humanities	Coeur d'Alene	Region	Traditional, Hybrid
CWI	Professional Truck Driving Training	49.0205	BTC, ITC	NA	Professional Technical Education	Nampa/Region III	Regional	Traditional
EITC	Professional Truck Driver Training	49.0205	PTD.BTC	Currently put on hold due to low enrollment for Fall 2015	Professional Truck Driving	Idaho Falls, ID	Regional	Lecture/Lab
UI	Asian Studies	50.0103		Minor	CLASS	Moscow--Region I & II	Regional	Traditional
ISU	Laser/Electro-Optics Technology	15.0304	ATC	N/A	Technology	ISU Campus	Regional	Hybrid
CSI	Health Promotion	51.9999	AA		Health, Recreation, and Fitness	CSI Campus	Regional	Traditional with some portion avail online
UI	Dance	50.0301	B.S.Dan.	Minor	ED	Moscow--Region I & II	Regional	Face-to-Face
BSU	Graphic Design	50.0402	B.F.A.		Arts & Sciences/ Art	Boise	Regional	Traditional
BSU	Illustration	50.0402	B.F.A.		Arts & Sciences/ Art	Boise	Regional	Traditional

Institution	Program Title	CIP Code	Degree Level/ Certificate	Options/Minors/ Emphases	College/Dept.	Location(s)	Regional/ Statewide	Method of Delivery
NIC	Industrial Mechanic/Millwright	47.0303	Tech. Certificate	N/A	Maintenance Mech./Millwright	Coeur d'Alene	Region	Traditional Web Enhanced On-line Hybrid
UI	Interior Design	50.0408	B.I.D.	Minor	CAA	Moscow/Boise--Region I & II, Region III	Statewide	Face to Face (Traditional)
NIC	Integrated Business Entrepreneurship	52.0701	Academic Certificate	N/A	Business Administration	Coeur d'Alene	Region	Traditional, Web Enhanced, On-line Hybrid, Self-Paced
BSU	Games, Interactive Media and Mobile	50.0411	B.S.		Innovation & Design/ Administration	Boise	Regional	Traditional
ISU	Law Enforcement	43.0107	ITC, BTC, AAS	N/A	Technology	ISU Campus	Regional	Face-to-Face
ISU	Machining Technology	48.0510	BTC,ITC,ATC,AAS,BAS	N/A	Technology	ISU Campus	Regional	Face-to-Face
BSU	Dance	50.0501		Minor	Arts & Sciences/ Theatre Arts	Boise	Regional	Traditional
BSU	Theatre Arts	50.0501	B.A.	Options: Dance; Design; Directing; Dramatic Writing; Performance; and Stage Management	Arts & Sciences/ Theatre Arts	Boise	Regional	Traditional
BSU	Theatre Arts	50.0501		Minor	Arts & Sciences/ Theatre Arts	Boise	Regional	Traditional
CSI	History	54.0101	AA		Social Science	CSI Campus	Regional	Traditional with some portion avail online and/OR AA only Online exclusively
NIC	Interdisciplinary Studies	30.9999	A.A.	N/A	Interdisciplinary Studies	Coeur d'Alene	Region	Traditional, Web Enhanced, On-line Hybrid
UI	Theatre Design and Technology	50.0501		Minor	CLASS	Moscow/Region I & II	Regional	traditional
UI	Theatre Arts; (Theatre Performance minor)	50.0501	B.A.; B.F.A.; B.S.; M.F.A.	Minor	CLASS	Moscow/Region I & II	Regional	traditional
ISU	Management	52.0201	BBA	Emphasis	Business	ISU Campus	Regional	Face-to-Face
BSU	Cinema and Digital Media Studies	50.0602	Certificate, Undergraduate		Arts & Sciences/ Communication	Boise	Regional	Traditional
NIC	Law Enforcement	43.0107	Post-Secondary	P.O.S.T.	Law Enforcement	Coeur d'Alene	Region	Traditional, Web Enhanced, On-line Hybrid
ISU	Marital, Couple and Family Counseling	51.1505	M Coun	N/A	Division of Health Sciences	ISU-Meridian Ctr	Regional	Hybrid
ISU	Marketing	52.1401	BBA	Marketing minor, emphasis	Business	ISU Campus	Regional	Hybrid
BSU	Visual Art	50.0701	B.A.		Arts & Sciences/ Art	Boise	Regional	Traditional

Institution	Program Title	CIP Code	Degree Level/ Certificate	Options/Minors/ Emphases	College/Dept.	Location(s)	Regional/ Statewide	Method of Delivery
BSU	Visual Art	50.0701	B.F.A.	Emphases: Visual Art; Art Metals; Ceramics; Drawing and Painting; Interdisciplinary Art Studio; Photography; Printmaking; Sculpture	Arts & Sciences/ Art	Boise	Regional	Traditional
BSU	Visual Art	50.0701		Minor	Arts & Sciences/ Art	Boise	Regional	Traditional
BSU	Visual Arts	50.0701	MFA		Arts & Sciences/ Art	Boise	Regional	Traditional
CSI	Horticulture	1.0601	AA, AS, AAS, ITC		Agriculture	CSI Campus	Regional	Traditional with some portion avail online
UI	Art	50.0701	B.A.; M.F.A	Minor	CAA	Moscow--Region I & II	Regional	Face to Face (Traditional); Online: M.A.T.
UI	Studio Art and Design	50.0702	B.F.A.		CAA	Moscow/Region I & II	Regional	Face to Face (Traditional)
BSU	History of Art & Visual Culture	50.0703	B.A.		Arts & Sciences/ Art	Boise	Regional	Traditional
BSU	History of Art & Visual Culture	50.0703		Minor	Arts & Sciences/ Art	Boise	Regional	Traditional
ISU	Marriage and Family Counseling	51.1505	M Coun	N/A	Division of Health Sciences	ISU Campus	Regional	Hybrid
ISU	Mass Communication	09.0102	BA	Mass Communication minor, emphases	Arts and Letters	ISU Campus	Regional	Hybrid
BSU	Music	50.0901	B.A.		Arts & Sciences/ Music	Boise	Regional	Traditional
BSU	Music	50.0901		Minor	Arts & Sciences/ Music	Boise	Regional	Traditional
CSI	Hospitality Management	52.0904	AAS, ITC	Lodging, Restaurant Management	Business	CSI Campus	Regional	Traditional with some portion avail online
NIC	Law Enforcement	43.0107	Tech. Certificate	N/A	Law Enforcement	Coeur d'Alene	Region	Traditional, Web Enhanced, On-line Hybrid
UI	Music	50.0901	M.A.; M.Mus.	Minor Music; Minor Jazz Studies	CLASS	Moscow--Region I & II	Regional	traditional
UI	Music	50.0901	B.A.; B.S.	Program emphasis: Applied; History and Literature; Theory	CLASS	Moscow/Region I & II	Regional	Traditional
ISU	Massage Therapy	51.3501	ITC,AAS.BAT	N/A	Technology	ISU Campus	Regional	Face-to-Face
ISU	Mathematics	27.0101	AS	Applied Mathematics, Mathematics, Statistics minors	Science and Engineering	ISU Campus	Regional	Face-to-Face
BSU	Music, Performance	50.0903	BM	Options: Bowed Strings; Piano; Voice; Wind/Brass/Percussion	Arts & Sciences/ Music	Boise	Regional	Traditional

Institution	Program Title	CIP Code	Degree Level/ Certificate	Options/Minors/ Emphases	College/Dept.	Location(s)	Regional/ Statewide	Method of Delivery
BSU	Music, Performance	50.0903	MM		Arts & Sciences/ Music	Boise	Regional	Traditional
UI	Music: Performance	50.0903	B.Mus.	Program Options: Keyboard; Instrumental; Vocal	CLASS	Moscow/Region I & II	Regional	Traditional
BSU	Music, Composition	50.0904	BM		Arts & Sciences/ Music	Boise	Regional	Traditional
UI	Music: Composition	50.0904	B.Mus.		CLASS	Moscow--Region I & II	Regional	traditional
UI	Music: Business	50.1003	B.Mus.		CLASS	Moscow--Region I & II	Regional	traditional
ISU	Mathematics	27.0101	BS	Applied Mathematics, Mathematics, Statistics minors	Science and Engineering	ISU Campus	Regional	Face-to-Face
BSU	Healthcare Simulation	51.0000	Graduate Certificate		Health Sciences/ Nursing	Boise	Regional	Traditional/Online?
NIC	Law Enforcement	43.0107	A.A.S.	N/A	Law Enforcement	Coeur d'Alene	Region	Traditional, Web Enhanced, On-line Hybrid
ISU	Mathematics	27.0101	MS	Applied Mathematics, Mathematics, Statistics minors	Science and Engineering	ISU Campus	Regional	Face-to-Face
ISU	Mathematics	27.0101	DA	Applied Mathematics, Mathematics, Statistics minors	Science and Engineering	ISU Campus	Regional	Face-to-Face
ISU	Mathematics	27.0101	AS	N/A	Science and Engineering	University Place	Regional	Face-to-Face
ISU	Mathematics for Secondary Teachers	13.1311	MA	N/A	Science and Engineering	ISU Campus	Regional	Face-to-Face
ISU	MBA/PharmD	51.2001	MBA, Pharm D	N/A	Business and Division of Health Sciences	ISU Campus	Statewide	Hybrid
ISU	Measurement and Control Engineering	14.2701	MS	N/A	Science and Engineering	ISU Campus	Regional	Face-to-Face
ISU	Measurement and Control Engineering	14.2701	MS	N/A	Science and Engineering	University Place	Regional	Face-to-Face
CSI	Human Resource Training & Development	52.1005	BS		Technology	CSI Campus		
CWI	Dental Assisting	51.0601	AAS, ITC	NA	Professional Technical Education	Nampa/Region III	Regional	Traditional
ISU	Mechanical Drafting	15.1306	ITC		Technology	ISU Campus	Regional	
ISU	Mechanical Engineering	14.1901	BS	N/A	Science and Engineering	ISU Campus	Regional	Hybrid
CSI	Human Resource Training & Development	52.1005	MTD		Technology	CSI Campus		
ISU	Mechanical Engineering	14.1901	MS	N/A	Science and Engineering	ISU Campus	Regional	Hybrid
ISU	Medical Assisting	51.0801	AAS,BAT	N/A	Technology	ISU Campus	Regional	Face-to-Face
NIC	Legal Administrative Assistant (needs to be discontinued)	52.0403	Adv. Tech. Cert.	N/A	Computer App/Office Tech	Coeur d'Alene	Region	Traditional Web Enhanced On-line Hybrid Self-Paced
LCSC	Medical Transcription	51.0708	ITC		BTS	Lewiston/Region 2	Regional	classroom

Institution	Program Title	CIP Code	Degree Level/ Certificate	Options/Minors/ Emphases	College/Dept.	Location(s)	Regional/ Statewide	Method of Delivery
NIC	Legal Administrative Assistant (needs to be discontinued)	52.0403	A.A.S.	N/A	Computer App/Office Tech	Coeur d'Alene	Region	Traditional Web Enhanced On-line Hybrid Self-Paced
NIC	Machine & CNC Technology	48.0501	Tech. Certificate	N/A	Machining	Coeur d'Alene	Region	Traditional Web Enhanced On-line Hybrid
CWI	Medical Administrative Support	51.0710	AAS, ITC	NA	Professional Technical Education	Nampa/Region III	Regional	Traditional
LCSC	Administrative Medical Assistant	51.0710	BAS, AAS, ATC		BTS	Lewiston/Region 2	Regional	classroom
LCSC	Medical Receptionist	51.0712	ITC		BTS	Lewiston/Region 2	Regional	classroom
LCSC	Medical Biller/Coder	51.0713	ITC		BTS	Lewiston/Region 2	Regional	classroom
NIC	Machine & CNC Technology	48.0501	Adv. Tech. Cert.	N/A	Machining	Coeur d'Alene	Region	Traditional
ISU	Medical Laboratory Science	51.1005	BS	N/A	Division of Health Sciences	ISU-Meridian Ctr	Statewide	Hybrid
CSI	IT Development and Security		AAS		Information Technology	CSI Campus	Regional	
CWI	Medical Assistant	51.0801	AAS, ITC	NA	Professional Technical Education	Nampa/Region III	Regional	Traditional
LCSC	Medical Assistant	51.0801	BAS, AAS		BTS	Lewiston/Region 2	Regional	classroom
NIC	Machine & CNC Technology	48.0501	A.A.S.	N/A	Machining	Coeur d'Alene	Region	Traditional Web Enhanced On-line Hybrid
NIC	Machine Technology (need to inactivate or discontinue)	48.0501	BTC	N/A	Machining	Coeur d'Alene	Region	Not Offered
NIC	Manufacturing	16.0613	Post-Secondary	N/A	Basic	Coeur d'Alene	Region	Not Offered
ISU	Medical Laboratory Science	51.1005	MS	N/A	Division of Health Sciences	ISU-Meridian Ctr	Statewide	Hybrid
NIC	Mathematics	27.0101	A.S.	N/A	Mathematics	Coeur d'Alene	Region	Traditional, Web Enhanced, On-line Hybrid
CSI	Language, American Sign Language	16.9999	AA		English, Lanugage & Philosophy	CSI Campus	Regional	Traditional with some portion avail online
CWI	Physical Therapy Assistant	51.0809	AAS	NA	Professional Technical Education	Nampa/Region III	Regional	Traditional
ISU	Medical Laboratory Science (*1)	51.1005	BS	N/A	Division of Health Sciences	ISU Campus	Statewide	Hybrid
CSI	Law Enforcement	43.0107	AAS, ITC, BTC		Social Science	CSI Campus	Regional	Traditional with some portion avail online
CSI	Liberal Arts	24.0101	AA		Social Science	CSI Campus	Regional	Traditional with some portion avail online and/OR AA only Online exclusively
LCSC	Paramedic	51.0904	BAS, AAS		BTS	Lewiston/Region 2	Regional	classroom
NIC	Medical Administrative Assistant	52.0404	A.A.S.	N/A	Computer App/Office Tech	Coeur d'Alene	Region	Traditional, Web Enhanced, On-line Hybrid, Self-Paced

Institution	Program Title	CIP Code	Degree Level/ Certificate	Options/Minors/ Emphases	College/Dept.	Location(s)	Regional/ Statewide	Method of Delivery
BSU	Radiologic Science	51.0907	B.S.	Emphasis: Radiologic Sciences; Computed Tomography; Diagnostic Medical Sonography; Diagnostic Radiology; Magnetic Resonance Imaging	Health Sciences/ Radiologic Sciences	Boise	Regional	Traditional
CSI	Library and Information Science	25.0101	AA		Library and Information Science	CSI Campus	Regional	Traditional with some portion avail online and/OR AA only Online exclusively
ISU	Medical Laboratory Science (*1)	51.1005	MS	N/A	Division of Health Sciences	ISU Campus	Statewide	Hybrid
ISU	Mental Health Counseling	51.1508	M Coun	N/A	Division of Health Sciences	ISU Campus	Regional	Hybrid
ISU	Mental Health Counseling	51.1508	M Coun	N/A	Division of Health Sciences	ISU-Meridian Ctr	Regional	Hybrid
BSU	Respiratory Care	51.0908	B.S.		Health Sciences/ Respiratory Care	Boise	Regional	Traditional
BSU	Respiratory Care	51.0908	B.S. degreecompletion		Health Sciences/ Respiratory Care	Boise	Regional	On-line
CSI	Mathematics	27.0101	AS		Math, Engineering & Computer Science	CSI Campus	Regional	Traditional with some portion avail online
CSI	Medical Assistant/Medical Coding	51.0801	ITC		Health Science & Human Services	CSI Campus	Regional	Traditional with some portion avail online
CWI	Surgical Technology	51.0909	AAS, ITC	NA	Professional Technical Education	Nampa/Region III	Regional	Traditional
LCSC	Medical Diagnostic Imaging	51.0910	Certificate	MRI/CT basic, advanced	Nursing and Health Sciences	LEW/CDA	Regional	Online
BSU	Imaging Sciences	51.0911	B.S.		Health Sciences/ Radiologic Sciences	Boise	Regional	On-line
LCSC	Radiographic Science	51.0911	AS		Nursing and Health Sciences	Lewiston	Regional	classroom
NIC	Medical Assistant	51.0801	Intermediate Tech. Certificate	N/A	Health Professions	Coeur d'Alene	Region	Traditional Web-Enhanced
ISU	Microbiology	26.0502	BS	N/A	Science and Engineering	ISU Campus	Regional	Hybrid
ISU	Microbiology	26.0502	MS	N/A	Science and Engineering	ISU Campus	Regional	Hybrid
ISU	Microbiology	26.0502	Ph.D.	N/A	Science and Engineering	ISU Campus	Regional	Face-to-Face
ISU	Music Education	13.1312	BME	N/A	Arts and Letters	ISU Campus	Regional	Hybrid
BSU	Athletic Training	51.0913	B.S.		Health Sciences/ Kinesiology	Boise	Regional	Traditional
UI	Athletic Training	51.0913	M.S.A.T; D.A.T		ED	Moscow--Region I & II	Regional	Face-to-Face
ISU	Music Performance	50.0903	BM		Arts and Letters	ISU Campus	Regional	Hybrid
ISU	Music, General	50.0901	BA, BS	Music minor	Arts and Letters	ISU Campus	Regional	Hybrid
ISU	Music, General	50.0901	MED		Arts and Letters	ISU Campus	Regional	Hybrid
ISU	Music, Performance	50.0903	BM	N/A	Arts and Letters	ISU Campus	Regional	Face-to-Face
ISU	Nuclear Engineering	14.2301	BS	N/A	Science and Engineering	ISU Campus	Regional	Hybrid
ISU	Nuclear Science and Engineering	14.2301	PB Cert	Emphasis	Science and Engineering	University Place	Regional	Hybrid
BSU	Pre-Dental Studies	51.1101	B.S.	Options: Biology, Chemistry	Health Sciences/ Community & Environmental Health	Boise	Regional	Traditional

Institution	Program Title	CIP Code	Degree Level/ Certificate	Options/Minors/ Emphases	College/Dept.	Location(s)	Regional/ Statewide	Method of Delivery
BSU	Pre-Medical Studies	51.1102	B.S.	Options: Biology; Chemistry	Health Sciences/ Community & Environmental Health	Boise	Regional	Traditional
NIC	Medical Assistant	51.0801	A.A.S.	N/A	Health Professions	Coeur d'Alene	Region	Traditional Web-Enhanced
CSI	Music	50.0901	AA		Fine Arts	CSI Campus	Regional	Traditional with some portion avail online
BSU	Pre-Veterinary Medicine	51.1104	B.S.		Health Sciences/ Community & Environmental Health	Boise	Regional	Traditional
NIC	Medical Billing Specialist	52.0404	A.A.S.	N/A	Computer App/Office Tech	Coeur d'Alene	Region	Traditional, Web Enhanced, On-line Hybrid, 'Self-Paced
UI	Pre-Health Professionals	51.1199		Minor		Moscow/Region I & II	Regional	Traditional
UI	Medical Education (WWAMI)	51.1201	Professional		WWAMI	Moscow--Region I & II	Regional	Traditional
BSU	Addiction Studies	51.1501		Minor	Health Sciences/ Community and Environmental Health/ Counselor Education	Boise	Regional	Traditional
BSU	Addiction Studies	51.1501	Graduate Certificate		Education/ Counselor Education; Health Sciences/ Community and Environmental Health	Boise	Regional	Traditional
CSI	Nursing (BSRN Completion)	51.3801	BS		Division of Health Sciences	Online	Regional	Boise State Univesity
ISU	Nuclear Science and Engineering	14.2301	MS	Emphasis	Science and Engineering	University Place	Regional	Hybrid
ISU	Nuclear Science and Engineering	14.2301	Ph D	Emphasis	Science and Engineering	University Place	Regional	Hybrid
ISU	Nuclear Science and Engineering	14.2301	MS	N/A	Science and Engineering	ISU Campus	Regional	Hybrid
ISU	Nuclear Science and Engineering	14.2301	Ph D	N/A	Science and Engineering	ISU Campus	Regional	Hybrid
ISU	Nursing	51.3801	BS	Options	Division of Health Sciences	ISU Campus	regional	Hybrid
ISU	Nursing	51.3801	MS	Options	Division of Health Sciences	ISU Campus and Meridian Center	Statewide	Online
ISU	Nursing	51.3801	Doctor of Nursing Practice (DNP)	Options	Division of Health Sciences	ISU Campus and Meridian Center	Statewide	Online
ISU	Nursing	51.3801	DNP (Post Master's)	Options	Division of Health Sciences	ISU Campus and Meridian Center	Statewide	Online
CSI	Nursing (BSRN Completion)	51.3801	BS		Division of Health Sciences	Online	Regional	Boise State Univesity
ISU	Nursing	51.3801	BS	Options	Division of Health Sciences	University Place	Regional	Hybrid
ISU	Nursing (BSRN Completion)	51.3801	BS	Options	Division of Health Sciences	CSI Campus	Regional	Hybrid
ISU	Nursing (BSRN Completion)	51.3801	BS	Options	Division of Health Sciences	ISU Campus	Regional	Hybrid
ISU	Nursing (Fast-track)	51.3801	BS	Options	Division of Health Sciences	ISU-Meridian Ctr	Regional	Hybrid
ISU	Nursing Practice	51.3818	DNP	Psychiatric Mental Health Nurse Practitioner				Online
ISU	Nursing Science	51.3801	Ph.D.	N/A	Division of Health Sciences	Regional	Regional	Online
ISU	Nursing: Education Option	51.3801	MS Option	Options	Division of Health Sciences	LCSC Campus	Regional	Online
ISU	Nursing: Education Option	51.3801	MS Option	Options	Division of Health Sciences	NICHE	Regional	Online

Institution	Program Title	CIP Code	Degree Level/ Certificate	Options/Minors/ Emphases	College/Dept.	Location(s)	Regional/ Statewide	Method of Delivery
ISU	Nursing: Education Option	51.3801	MS Option	Option	Technology	University Place	Regional	Online
ISU	Nursing: Nurse Practioner Option	51.3801	MS Option	Options	Division of Health Sciences	LCSC Campus	Regional	Online
BSU	Public Health	51.2201	B.S.	Emphases: Public Health; Environmental and Occupational Health; Health Education and Promotion	Health Sciences/ Community & Environmental Health	Boise	Regional	Traditional
BSU	Environmental and Occupational Health	51.2202	B.S.		Health Sciences/ Community & Environmental Health	Boise	Regional	Traditional
ISU	Nursing: Nurse Practioner Option	51.3801	MS Option	Options	Division of Health Sciences	NICHE	Regional	Online
ISU	Occupational Therapy	51.2306	MOT	N/A	Division of Health Sciences	ISU Campus	Statewide	Hybrid
ISU	Organizational Learning and Performance	52.1005	MOLP	Options	Education	CSI Campus	Regional	Hybrid
BSU	Health Education and Promotion	51.2299	B.S.		Health Sciences/ Kinesiology	Boise	Regional	Traditional
BSU	Health Science	51.2299	M.H.S.	Emphases: Health Policy; Health Science; Health Promotion; Health Services Leadership	Health Sciences/ Community and Envir. Health	Boise	Regional	Traditional
BSU	Health Services Leadership	51.2299	Graduate Certificate		Health Sciences/ Community & Environmental Health	Boise	Regional	Traditional
ISU	Organizational Learning and Performance	52.1005	BS,MOLP	Options	Education	ISU Campus	Regional	Hybrid
ISU	Organizational Learning and Performance	52.1005	BS	Options	Education	University Place	Regional	Hybrid
CSI	Nursing, Practical	51.1613	ITC		Health Science & Human Services	CSI Campus	Regional	Traditional with some portion avail online
NIC	Medical Coding option	51.0713	TC		Computer App/Office Tech	Coeur d'Alene	Region	Traditional, Web Enhanced, On-line Hybrid, Self-Paced
UI	Rehabilitation Counseling Category R Certificate	51.2310	Certificate		ED	Boise--Region III	Regional	Hybrid; combination
ISU	Organizational Learning and Performance	52.1005	MOLP	Options	Education	University Place	Regional	Hybrid
ISU	Paralegal Studies	22.0302	AAS,BAT	N/A	Technology	ISU Campus	Regional	Hybrid
ISU	Paramedic	51.0904	AS	N/A	Division of Health Sciences	ISU-Meridian Ctr	Regional	Face-to-Face
ISU	Pharmaceutical Sciences (PPRA)	51.2010	MS	Tracks	Division of Health Sciences	ISU Campus	Statewide	Hybrid
ISU	Pharmaceutical Sciences (PPRA)	51.2010	Ph D	Tracks	Division of Health Sciences	ISU Campus	Statewide	Hybrid
ISU	Pharmaceutical Sciences (PSCI)	51.2010	MS	Tracks	Division of Health Sciences	ISU Campus	Statewide	Hybrid
ISU	Pharmaceutical Sciences (PSCI)	51.2010	Ph D	Tracks	Division of Health Sciences	ISU Campus	Statewide	Hybrid
ISU	Pharmacy (1st-4th years)	51.2001	Pharm D	Tracks	Division of Health Sciences	ISU Campus	Statewide	Hybrid
ISU	Pharmacy (3rd & 4th years)	51.2001	Pharm D	Tracks	Division of Health Sciences	ISU-Meridian Ctr	Statewide	Hybrid

Institution	Program Title	CIP Code	Degree Level/ Certificate	Options/Minors/ Emphases	College/Dept.	Location(s)	Regional/ Statewide	Method of Delivery
ISU	Pharmacy: Non-Traditional Pharm.D.	51.2001	Pharm D	Tracks	Division of Health Sciences	Statewide	Statewide	Hybrid
ISU	Philosophy	38.0101	BA	Philosophy, Ethics, Philosophy & Religion minors, options	Arts and Letters	ISU Campus	Regional	Hybrid
ISU	Physical Education	13.1314	BA, BS	Coaching, Outdoor Education, Sport Management minors, emphases	Education	ISU Campus	Regional	Face-to-Face
ISU	Physical Education/Athletic Administration	13.1314	MPE	N/A	Education	CSI Campus	Regional	Hybrid
ISU	Physical Education/Athletic Administration	13.1314	MPE	N/A	Education	ISU Campus	Regional	Hybrid
ISU	Physical Education/Athletic Administration	13.1314	MPE	N/A	Education	ISU-Meridian Ctr	Regional	Hybrid
ISU	Physical Therapist Assistant	51.0806	AAS,BAT	N/A	Technology	ISU Campus	Regional	Face-to-Face
ISU	Physical Therapy	51.2308	DPT	N/A	Division of Health Sciences	ISU Campus	Statewide	Hybrid
ISU	Physician Assistant Studies	51.0912	MPAS	N/A	Division of Health Sciences	ISU Campus	Statewide	Face-to-Face
ISU	Physician Assistant Studies	51.0912	MPAS	N/A	Division of Health Sciences	ISU-Meridian Ctr	Statewide	Face-to-Face
ISU	Physician Assistant Studies	51.0912	MPAS	N/A	Division of Health Sciences	College of ID Campus-Caldwell	Statewide	Face-to-Face
BSU	Nursing	51.3801	B.S.		Health Sciences/ Nursing	Boise	Regional	Traditional
BSU	Nursing	51.3801	B.S. degree completion		Health Sciences/ Nursing	Boise	Regional	On-line
BSU	Nursing	51.3801	M.S.N., M.N.		Health Sciences/ Nursing	Boise	Regional	On-line
CSI	Nursing, Registered	51.3801	AS		Health Science & Human Services	CSI Campus	Regional	Traditional with some portion avail online
CSI	Paramedics	51.0904	AAS, ITC		Health Science & Human Services	CSI Campus	Regional	Traditional with some portion avail online
CSI	Pharmacy (pre)	51.1103	AS		Physical Science	CSI Campus	Regional	Traditional with some portion avail online
CWI	Nursing - Registered	51.3801	AS	NA		Nampa/Region III	Regional	Traditional
EITC	Registered Nursing	51.3801	RN.AAS	N/A	Registered Nursing Technology	Idaho Falls, ID	Regional	Lecture/Lab
LCSC	Nursing, Basic BSN	51.3801	BSN		Nursing and Health Sciences	LEW/CDA	Regional	classroom
LCSC	Nursing, LPN to BSN	51.3801	BSN		Nursing and Health Sciences	Lewiston	Regional	classroom
LCSC	Nursing, RN to BSN	51.3801	BSN		Nursing and Health Sciences	LEW/CDA	Regional	online
NIC	Medical Office Transcriptionist (needs to be discontinued) Pre-Health Information Technology	51.0708	Tech. Certificate	Pre-Health Info	Computer App/Office Tech	Coeur d'Alene	Region	Traditional, Web Enhanced, On-line Hybrid, Self-Paced
ISU	Physics	40.0801	AS,BA, BS, MS,MNS	N/A	Science and Engineering	ISU Campus	Regional	Face-to-Face
BSU	Doctor of Nursing Practice	51.3818	DNP		Health Sciences/ Nursing	Boise	Regional	Traditional
BSU	Master of Nursing, Adult-Gerontology Nurse Practitioner	51.3818	M.N., Graduate Certificate	Acute Care Option, Primary Care Option	Health Sciences/ Nursing	Boise	Regional	Traditional
ISU	Physics, Applied	40.0801	Ph D	N/A	Science and Engineering	ISU Campus	Regional	Face-to-Face
EITC	Practical Nursing	51.3901	PN.ATC	N/A	Practical Nursing Technologies	Idaho Falls, ID	Regional	Lecture/Lab
LCSC	Practical Nursing	51.3901	AAS		Nursing and Health Sciences/BTS	Lewiston	Regional	classroom

Institution	Program Title	CIP Code	Degree Level/ Certificate	Options/Minors/ Emphases	College/Dept.	Location(s)	Regional/ Statewide	Method of Delivery
NIC	Medical Receptionist	52.0404	Tech. Certificate	N/A	Computer App/Office Tech	Coeur d'Alene	Region	Traditional, Web Enhanced, On-line Hybrid, Self-Paced
BSU	Health Science Studies	51.9999	B.S.	Emphases: Health Science Studies; General Health; Gerontology; HealthInformatics and Information Management; Health Policy and Leadership; Prevention and Addiction Studies; Public Health; Science	Health Sciences/ Community & Environmental Health	Boise	Regional	Traditional
CSI	Physical Education - Outdoor Recreation	13 1314	AA		Health, Recreation, and Fitness	CSI Campus	Regional	Traditional with some portion avail online
ISU	Physics: Health Physics Emphasis	40.0801	MS Emph.	N/A	Science and Engineering	University Place	Regional	Hybrid
ISU	Plumbing Apprenticeship	46.0503	AAS	N/A	Technology	ISU Campus	Regional	Face-to-Face
ISU	Political Science	45.1001	BA, BS		Arts and Letters	ISU Campus	Regional	Hybrid
ISU	Political Science	45.1001	MA		Arts and Letters	ISU Campus	Regional	Face-to-Face
BSU	General Business	52.0101	B.B.A.		Business & Economics/ Management	Boise	Regional	Traditional
BSU	General Business	52.0101	B.B.A.		Business & Economics/ Management	Twin Falls	Regional	Traditional
NIC	Medical Transcriptionist (needs to be discontinued)	51.0708	A.A.S.	N/A	Computer App/Office Tech	Coeur d'Alene	Region	Traditional, Web Enhanced, On-line Hybrid, Self-Paced
NIC	Music	50.0901	A.A.	N/A	Music	Coeur d'Alene	Region	Traditional, Web Enhanced, On-line Hybrid
NIC	Non-Degree Seeking Students	32.0101	N/A	N/A	N/A	Coeur d'Alene	Region	
NIC	Nursing (PN)	51.3901	Intermediate Tech. Certificate	Practical	Health Professions	Coeur d'Alene	Region	Traditional Web Enhanced Interactive Video
NIC	Nursing (RN)	51.3801	A.S.	Registered	Health Professions	Coeur d'Alene	Region	Traditional Web-Enhanced
	Nursing Assistant		BTC					
NIC	Office Specialist/Receptionist	52.0408	Tech. Certificate	N/A	Computer App/Office Tech	Coeur d'Alene	Region	Traditional, Web Enhanced, On-line Hybrid, Self-Paced
NIC	Office Technology	52.0408	Tech. Certificate	N/A	Computer App/Office Tech	Coeur d'Alene	Region	Traditional, Web Enhanced, On-line Hybrid, Self-Paced

Institution	Program Title	CIP Code	Degree Level/ Certificate	Options/Minors/ Emphases	College/Dept.	Location(s)	Regional/ Statewide	Method of Delivery
NIC	Outdoor Leadership	52.0906	Tech. Certificate	N/A	Physical Education	Coeur d'Alene	Region	Traditional, Web Enhanced, On-line Hybrid
NIC	Outdoor Power/Recreational Vehicle	47.0611	Tech. Certificate	N/A	Outdoor Power/Recreational	Coeur d'Alene	Region	Traditional, Web Enhanced, On-line Hybrid
ISU	Political Science	45.1001	DA		Arts and Letters	ISU Campus	Regional	Face-to-Face
ISU	Political Science- Public Administration	45.1101	MPA	N/A	Arts and Letters	ISU Campus	Regional	Face-to-Face
ISU	Practical Nursing	51.3901	ATC	N/A	Technology	ISU Campus	Regional	Hybrid
ISU	Psychology	42.0101	BA, BS	Psychology minor	Arts and Letters	ISU Campus	Regional	Hybrid
ISU	Psychology	42.0101	MS	Psychology minor	Arts and Letters	ISU Campus	Regional	Face-to-Face
ISU	Public Health	51.2201	MPH	N/A	Division of Health Sciences	ISU Campus	Statewide	Hybrid
ISU	Public Health	51.2201	MPH	N/A	Division of Health Sciences	ISU-Meridian Ctr	Statewide	Hybrid
ISU	Radiographic Science	51.0970	AAS	N/A	Division of Health Sciences	ISU Campus	Regional	Hybrid
ISU	Radiographic Science	51.0970	BS	N/A	Division of Health Sciences	ISU Campus	Regional	Hybrid
ISU	Registered Nursing	51.3801	AS	N/A	Technology	ISU Campus	Regional	Hybrid
ISU	Respiratory Therapy	51.0908	AS	N/A	Technology	CSI Campus	Regional	Hybrid
ISU	Respiratory Therapy	51.0908	AS	N/A	Technology	ISU Campus	Regional	Hybrid
ISU	Respiratory Therapy	51.0908	AS	N/A	Technology	University Place	Regional	Hybrid
BSU	Business Administration	52.0201	M.B.A.		Business & Economics/ Graduate Business programs	Boise	Regional	Traditional
BSU	Business Administration (Executive)	52.0201	M.B.A.		Business & Economics/ Graduate Business Programs	Boise	Regional	Traditional
BSU	Entrepreneurship Management	52.0201	B.B.A.		Business & Economics/ Management	Boise	Regional	Traditional
BSU	Entrepreneurship Management	52.0201		Minor	Business & Economics/ Management	Boise	Regional	Traditional
BSU	Human Resource Management	52.0201	B.B.A.		Business & Economics/ Management	Boise	Regional	Traditional
BSU	Human Resource Management	52.0201		Minor	Business & Economics/ Management	Boise	Regional	Traditional
CSI	Physical Education - Sport Management	31.0601	AA		Health, Recreation, and Fitness		Regional	Traditional with some portion avail online
CSI	Physical Therapist Assistant	51.2308	AAS		Health Science & Human Services	CSI Campus		Traditional with some portion avail online
CWI	Business - General	52.0201	AA	NA	Social Sciences and Public Affairs/Department of Business	Nampa/Region III	Regional	Traditional, Hybrid, Online
LCSC	Business Administration	52.0201	BA, BS, AS		Business	LEW/CDA	Regional	classroom/online
NIC	Paralegal	22.0103	A.A.S.	N/A	Paralegal	Coeur d'Alene	Region	Traditional Web Enhanced On-line Hybrid Self-Paced
UI	Business	52.0201		Minor	CBE	Moscow--Region I & II	Regional	Online

Institution	Program Title	CIP Code	Degree Level/ Certificate	Options/Minors/ Emphases	College/Dept.	Location(s)	Regional/ Statewide	Method of Delivery
UI	Entrepreneurship	52.0201	Certificate		CBE	Moscow--Region I & II	Regional	Face to face
UI	General Management	52.0201	M.B.A.		CBE	CdA--Region I & II	Regional	Face to face
UI	Operations Management	52.0201	B.S.Bus.		CBE	Moscow--Region I & II	Regional	Face to face
BSU	Supply Chain Management	52.0203	B.B.A.		Business & Economics/ Information Technology & Supply Chain Mgmt	Boise	Regional	Traditional
BSU	Supply Chain Management	52.0203		Minor	Business & Economics/ Information Technology & Supply Chain Mgmt			
LCSC	Supervision	52.0205	ITC		BTS	Lewiston/Region 2	Regional	classroom
BSU	Non-Profit Management	52.0206		Minor	Business and Economics/ Management	Boise	Regional	Traditional
CWI	Transportation Management	52.0209	AS	NA	Transportation	Nampa/Region III	Regional	Traditional
BSU	Leadership and Human Relations	52.0213	Certificate, Undergraduate		Innovation & Design/ Administration	Boise	Regional	Traditional
BSU	Business Operational Excellence	52.0299	M.B.O.E.		Business & Economics/ Graduate Business programs	Boise	Regional	Traditional
ISU	Robotics and Communications Systems Engineering	15.0303	ATC,AAS,BAS	N/A	Technology	ISU Campus	Regional	Hybrid
ISU	Russian	16.0402	AA		Arts and Letters	ISU Campus	Regional	Face-to-Face
BSU	Accountancy	52.0301	B.B.A.		Business & Economics/ Accountancy	Boise	Regional	Traditional
BSU	Accountancy	52.0301	B.B.A.		Business & Economics/ Accountancy	Twin Falls	Regional	Traditional
BSU	Accountancy	52.0301	B.B.A.	Options, Accountancy; Internal Audit	Business & Economics/ Accountancy	Boise	Regional	Traditional
BSU	Accountancy	52.0301		Minor	Business & Economics/ Accountancy	Boise	Regional	Traditional
BSU	Accountancy	52.0301	M.S.		Business & Economics/ Accountancy	Boise	Regional	Traditional
BSU	Accountancy Taxation	52.0301	M.S.		Business & Economics/ Accountancy	Boise	Regional	Traditional
BSU	Internal Auditing	52.0301		Minor	Business & Economics/ Accountancy	Boise	Regional	Traditional
CSI	Physics	40.0801	AS		Physical Science	CSI Campus	Regional	Traditional with some portion avail online
EITC	Accounting Paraprofessional	52.0301	ACP.AAS	N/A	Accounting Technologies	Idaho Falls, ID	Regional	Lecture/Lab
EITC	Applied Accounting Clerk Technical Certificate	52.0301	AAC.ITC	N/A	Accounting Technologies	Idaho Falls, ID	Regional	Lecture/Lab
UI	Accountancy	52.0301	M.Acct.		CBE	Moscow--Region I & II	Regional	Face to face
UI	Accounting	52.0301	B.S.Bus.	Minor	CBE	Moscow--Region I & II	Regional	Face to face
ISU	School Counseling	13.1101	M Coun	N/A	Division of Health Sciences	ISU Campus	Regional	Hybrid

Institution	Program Title	CIP Code	Degree Level/ Certificate	Options/Minors/ Emphases	College/Dept.	Location(s)	Regional/ Statewide	Method of Delivery
CSI	Political Science	45.1001	AA		Social Science	CSI Campus	Regional	Traditional with some portion avail online and/OR AA only Online exclusively
CWI	Applied Accounting	52.0302	AAS, ATC	NA	Professional Technical Education	Nampa/Region III	Regional	Traditional
LCSC	Accounting Assistant	52.0302	BAS, AAS, ATC		BTS	Lewiston/Region 2	Regional	classroom
NIC	Pharmacy Technology	51.0805	Intermediate Tech. Certificate	N/A	Health Professions	Coeur d'Alene	Region	Traditional Web Enhanced On-line
NIC	Philosophy	38.0101	A.A.	N/A	Philosophy	Coeur d'Alene	Region	Traditional Web Enhanced On-line Hybrid
NIC	Photography	50.0605	A.A.	N/A	Photography	Coeur d'Alene	Region	Traditional Web Enhanced On-line Hybrid
CSI	Psychology	42.0101	AA		Social Science	CSI Campus	Regional	Traditional with some portion avail online
ISU	School Counseling	13.1101	M Coun	N/A	Division of Health Sciences	ISU-Meridian Ctr	Regional	Hybrid
CSI	Radiologic Technology	51.0907	AAS		Health Science & Human Services	CSI Campus	Regional	Traditional with some portion avail online
CWI	Administrative Support Technology	52.0401	AAS, ATC, ITC, BTC	NA	Professional Technical Education	Nampa/Region III	Regional	Traditional
LCSC	Administrative Assistant	52.0401	BAS, AAS, ATC		BTS	Lewiston/Region 2	Regional	classroom
EITC	Professional Development/Business Application	52.0401	BTC	N/A	Office Technologies	Idaho Falls, ID	Regional	Lecture/Lab
NIC	Physical Therapist Assistant	51.0806	A.A.S.	N/A	Health Professions	Coeur d'Alene	Statewide	Traditional Interactive Video
NIC	Physics	40.0801	A.S.	N/A	Physics	Coeur d'Alene	Region	Traditional, Web Enhanced, On-line Hybrid
NIC	Political Science	45.1001	A.S.	N/A	Political Science	Coeur d'Alene	Region	Traditional Web Enhanced On-line Hybrid
NIC	Pre-Medical Related Fields	51.1102	A.S.	N/A	Biology	Coeur d'Alene	Region	Traditional Web Enhanced On-line Hybrid
NIC	Pre-Microbiology/Medical Tech	26.0501	A.S.	N/A	Biology	Coeur d'Alene	Region	Traditional, Web Enhanced, On-line Hybrid
NIC	Pre-Nutrition	19.0501	A.S.	N/A	Biology	Coeur d'Alene	Region	Traditional, Hybrid
NIC	Pre-Physical Therapy	51.2308	A.S.	N/A	Biology	Coeur d'Alene	Region	Traditional Hybrid

Institution	Program Title	CIP Code	Degree Level/ Certificate	Options/Minors/ Emphases	College/Dept.	Location(s)	Regional/ Statewide	Method of Delivery
NIC	Pre-Veterinary Medicine	51.1104	A.S.	N/A	Biology	Coeur d'Alene	Region	Traditional Hybrid
ISU	School Psychology	42.2805	Ed S	N/A	Education	ISU Campus	Regional	Hybrid
LCSC	Office Technology	52.0408	ITC		BTS	Lewiston/Region 2	Regional	classroom
NIC	Psychology	42.0101	A.S.	N/A	Psychology	Coeur d'Alene	Region	Traditional, Web Enhanced, On-line Hybrid
NIC	Radiography	51.0911	A.A.S.	N/A	Health Professions	Coeur d'Alene	Region	Traditional Web Enhanced
NIC	Resort/Recreation Management	52.0906	A.A.S.	N/A	Resort/Recreation Management	Coeur d'Alene	Region	Traditional, Web Enhanced, On-line Hybrid
NIC	Social Work	44.0701	A.A.	N/A	Sociology	Coeur d'Alene	Region	Traditional Web Enhanced On-line Hybrid
NIC	Sociology	45.1101	A.A.	N/A	Sociology	Coeur d'Alene	Region	Traditional, Web Enhanced, On-line Hybrid
LCSC	Business and Communication	52.0501	BA, BS		Business / Humanities	LEW/CDA	Regional	classroom/online
BSU	Business Economics	52.0601	B.B.A.		Business & Economics/ Economics	Boise	Regional	Traditional
UI	Business Economics	52.0601	B.S.Bus.	Options: 1) General; 2) Financial Economics	CBE	Moscow--Region I & II	Regional	Face to face
CSI	Social Work	44.0701	BSW, MSW		Social Science	BSU Campus		
ISU	Secondary Education	13.1205	BA, BS	Art, Biological Sciences, Business Educ, Chemistry, Comm/Rhetorical, Economics, English, Family & Consumer, French, Geology, German, Health Education, History, Mathematics, Physical Education, Physics, Political Science, Social Science, Social Studies, Sociology, Spanish, Special Educ, Theatre.	Education	CSI Campus	Regional	Hybrid
BSU	Finance	52.0801	B.B.A.		Business & Economics/ Marketing & Finance	Boise	Regional	Traditional
BSU	Finance	52.0801		Minor	Business & Economics/ Marketing & Finance	Boise	Regional	Traditional
UI	Finance	52.0801	B.S.Bus.		CBE	Moscow--Region I & II	Regional	Face to face

Institution	Program Title	CIP Code	Degree Level/ Certificate	Options/Minors/ Emphases	College/Dept.	Location(s)	Regional/ Statewide	Method of Delivery
LCSC	Hospitality Management	52.0901	BAS, AAS, ATC		BTS	Lewiston/Region 2	Regional	classroom
LCSC	Hospitality Management	52.0901	BA, BS		Business	LEW/CDA	Regional	classroom/online
NIC	Theatre	50.0501	A.A.	N/A	Theatre	Coeur d'Alene	Region	Traditional, Web Enhanced, On-line Hybrid
CSI	Social Work	44.0701 was 45.0101	AA		Social Science	CSI Campus	Regional	Traditional with some portion avail online
LCSC	Rooms Division Management	52.0904	ITC		BTS	Lewiston/Region 2	Regional	classroom
LCSC	Food & Beverage Management	52.0905	ITC		BTS	Lewiston/Region 2	Regional	classroom
NIC	Virtual Administrative Assistant	52.0499	Tech. Certificate	N/A	Business Administration	Coeur d'Alene	Region	Traditional, Web Enhanced, On-line Hybrid, Self-Paced
NIC	Welding Technology	48.0508	BTC	N/A	Welding	Coeur d'Alene	Region	Not Offered
UI	Human Resource Development	52.1001	Certificate		ED	Moscow, CdA, Boise--Region I & II, Region III	Regional	traditional
UI	Management and Human Resources	52.1001	B.S.Bus.	Emphasis: 1) Management; 2) Human Resources	CBE	Moscow--Region I & II	Regional	Face to face
ISU	Secondary Education	13.1205	BS, BA	Art, Biological Sciences, Business Educ, Chemistry,	Education	ISU Campus	Regional	Hybrid
ISU	Secondary Education	13.1205	BS, BA	Art, Biological Sciences, Business Educ, Chemistry, Comm/Rhetorical, Economics, English, Family & Consumer, French, Geology, German, Health Education, History, Mathematics, Physical Education, Physics, Political Science, Social Science, Social Studies, Sociology, Spanish, Special Educ, Theatre.	Education	University Place	Regional	Hybrid
ISU	Shoshoni	16.1001	AA	N/A	Arts and Letters	ISU Campus	Regional	Face-to-Face
ISU	Sign Language Interpreting	16.1603	BS	Sign Language minor	Division of Health Sciences	ISU Campus	Statewide	Hybrid
ISU	Sign Language Interpreting	16.1603	BS	Sign Language minor	Division of Health Sciences	ISU-Meridian Ctr	Statewide	Hybrid
BSU	Workplace E-Learning and Performance Support	52.1005	Graduate Certificate		Engineering/ Organization Performance & Workplace Learning	Boise	Regional	On-line
BSU	Workplace Instructional Design	52.1005	Graduate Certificate		Engineering/ Organization Performance &	Boise	Regional	On-line

Institution	Program Title	CIP Code	Degree Level/ Certificate	Options/Minors/ Emphases	College/Dept.	Location(s)	Regional/ Statewide	Method of Delivery
CSI	Sociology	45.1101	AA		Social Science	CSI Campus	Regional	Traditional with some portion avail online
CSI	STEM	30	AS		Education	CSI Campus	Regional	Traditional with some portion avail online
BSU	Workplace Performance Improvement	52.1099	Graduate Certificate		Engineering/ Organizational Performance and Workplace Learning	Boise	Regional	On-line
BSU	International Business	52.1101	B.B.A.		Business & Economics/ International Business	Boise	Regional	Traditional
BSU	International Business	52.1101		Minor	Business & Economics/ International Business	Boise	Regional	Traditional
UI	International Business	52.1101		Minor	CBE	Moscow--Region I & II	Regional	Face to face
NIC	Welding Technology	48.0508	Tech. Certificate	N/A	Welding	Coeur d'Alene	Region	Traditional Web Enhanced
UI	Information Systems	52.1201	B.S.Bus.		CBE	Moscow--Region I & II	Regional	Face to face
BSU	Business and Economics Analytics	52.1301	B.S.		Business & Economics/Economics	Boise	Regional	Traditional
LCSC	Management	52.1301	BA, BS		Business	LEW/CDA	Regional	classroom/online
ISU	Sign Language Studies	16.1603	AS, BS	N/A	Division of Health Sciences	ISU Campus	Regional	Hybrid
BSU	Marketing	52.1401	B.B.A.		Business & Economics/ Marketing & Finance	Boise	Regional	Traditional
BSU	Marketing	52.1401		Minor	Business & Economics/ Marketing & Finance	Boise	Regional	Traditional
CWI	Marketing Management Technology	52.1401	AAS, ATC, ITC	NA	Professional Technical Education	Nampa/Region III	Regional	Traditional
EITC	Business Technology	52.1401	BT.ITC/ATC/AAS	N/A	Business Technologies	Idaho Falls, ID	Regional	Lecture/Lab
EITC	Marketing and Management	52.1401	MAM.AAS	N/A	Business Technologies	Idaho Falls, ID	Regional	Lecture/Lab
EITC	Marketing and Management	52.1401	MAM.ATC	N/A	Business Technologies	Idaho Falls, ID	Regional	Lecture/Lab
UI	Marketing	52.1401	B.S.Bus.	Minor; Emphasis: 1) General Marketing; 2) Entrepreneurship; 3) PGA Golf Management	CBE	Moscow--Region I & II	Regional	Face to face
LCSC	Retailing	52.1803	ITC		BTS	Lewiston/Region 2	Regional	classroom
BSU	Construction Management	52.2001	B.S.		Engineering/ Construction Mgmgt	Boise	Regional	Traditional
BSU	Construction Management	52.2001		Minor	Engineering/ Construction Mgmgt	Boise	Regional	Traditional
LCSC	Business Management	52.9999	BAS, AAS, ATC		BTS	Lewiston/Region 2	Regional	classroom
ISU	Social Work	44.0701	BA	N/A	Arts and Letters	ISU Campus	Regional	Hybrid

Institution	Program Title	CIP Code	Degree Level/ Certificate	Options/Minors/ Emphases	College/Dept.	Location(s)	Regional/ Statewide	Method of Delivery
BSU	Applied Historical Research	54.0101	M.A.H.R.		Arts & Sciences/ History	Boise	Regional	Traditional
BSU	History	54.0101	B.A.		Arts & Sciences/ History	Boise	Regional	Traditional
BSU	History	54.0101	M.A.		Arts & Sciences/ History	Boise	Regional	Traditional
BSU	History	54.0101		Minor	Arts & Sciences/ History	Boise	Regional	Traditional
CSI	Surgical First Assisting	51.0909	AAS		Health Science & Human Services	CSI Campus	Regional	Traditional with some portion avail online
CWI	History	54.0101	AA	NA	Social Sciences and Public Affairs/ Department of Culture, History, and Politics	Nampa/Region III	Regional	Traditional, Hybrid, Online
NIC	Welding Technology	48.0508	Adv. Tech. Cert.	N/A	Welding	Coeur d'Alene	Region	Traditional Web Enhanced On-line Hybrid
UI	History	54.0101	B.A.; B.S.; M.A. Ph.D.	Minor; Program Emphases: American; European; General	CLASS	Moscow--Region I & II	Regional	traditional
ISU	Sociology	45.1101	BA	Sociology minor	Arts and Letters	ISU Campus	Regional	Hybrid
ISU	Sociology	45.1101	MA	Sociology minor	Arts and Letters	ISU Campus	Regional	Hybrid
ISU	Spanish	16.0905	BA		Arts and Letters	ISU Campus	Regional	Hybrid
ISU	Special Education	13.1001	Ed S	Deaf Education minor	Education	ISU Campus	Regional	Hybrid
ISU	Speech-Language Pathology (Fully Online w/clinicals on-site)	51.0203	MS	Emphases	Division of Health Sciences	ISU Campus	Statewide	Hybrid
ISU	Speech-Language Pathology (Fully Online w/clinicals on-site)	51.0203	MS	Emphases	Division of Health Sciences	ISU-Meridian Ctr	Statewide	Hybrid
NIC	Welding Technology	48.0508	A.A.S.	N/A	Welding	Coeur d'Alene	Region	Traditional Web Enhanced On-line Hybrid
UI	Sustainable Food Systems	01.0308	B.S.Ag.L.S.		CALS	Moscow/Region I & II	Regional	Traditional
CSI	Surgical Technology	51.0909	AAS, BTC		Health Science & Human Services	CSI Campus	Regional	Traditional with some portion avail online
ISU	Statistics	27.0501	BS	Applied Mathematics, Mathematics, Statistics minors	Science and Engineering	ISU Campus	Regional	Face-to-Face
ISU	Student Affairs Counseling	13.1101	M Coun	N/A	Division of Health Sciences	ISU Campus	Regional	Hybrid
ISU	Student Affairs Counseling	13.1101	M Coun	N/A	Division of Health Sciences	ISU-Meridian Ctr	Regional	Hybrid

Institution	Program Title	CIP Code	Degree Level/ Certificate	Options/Minors/ Emphases	College/Dept.	Location(s)	Regional/ Statewide	Method of Delivery
ISU	Theatre	50.0501	BA,BS	Acting, Acting & Directing, Costume, Technical Theatre, Technical Theatre & Costume, Theatre, Theatre History & Dramatic Literature minors	Arts and Letters	ISU Campus	Regional	Hybrid
EITC	Web Development Specialist	11.0801	WDS.AAS/ATC/ITC	N/A	Web Development Technologies	Idaho Falls, ID	Regional	Lecture/Lab
EITC	MS Certified Systems Engineer	11.0901	CSE.BTC	N/A	Computer Networking Technologies	Idaho Falls, ID	Regional	Lecture/Lab
EITC	MS Computer Networking Technologies	11.0901	CNT.AAS, ITC	N/A	Computer Networking Technologies	Idaho Falls, ID	Regional	Lecture/Lab
ISU	Theatre	50.0501	MA	Acting, Acting & Directing, Costume, Technical Theatre, Technical Theatre & Costume, Theatre, Theatre History & Dramatic Literature minors	Arts and Letters	ISU Campus	Regional	Face-to-Face
CSI	Theatre	50.0501	AA		Fine Arts	CSI Campus	Regional	Traditional with some portion avail online
BSU	Early and Special Education	13.1210	B.A.	1. Dual Special Education - Elementary Education Certification 2. Dual Special Education - Early Childhood Intervention Certification 3. Dual Early Childhood Intervention - Elementary Education Certification	Education/ Early and Special Education	Boise	Regional	Traditional
BSU	Early and Special Education	13.1210	M.Ed.		Education/ Early and Special Education	Boise	Regional	Traditional
LCSC	Early Childhood Development	13.1210	BAS, AAS, ATC, ITC		BTS	Lewiston/Region 2	Regional	classroom/online
EITC	Energy Systems Technology	15.0503	ESTEC.ITC	N/A	Energy Systems Technology	Idaho Falls, ID	Regional	Lecture/Lab
BSU	Biomolecular Sciences	26.0210	PhD.		Arts and Sciences/ Administration	Boise	Regional	Traditional
ISU	Theatre/Film/Video	50.0601	BA		Arts and Letters	ISU Campus	Regional	Face-to-Face
ISU	Welding	48.0508	ITC, ATC,AAS,BAT	N/A	Technology	ISU Campus	Regional	Face-to-Face
EITC	Fire Service Technology	43.0203	FST.AAS	N/A	Fire Service Technologies	Idaho Falls, ID	Regional	Lecture/Lab
EITC	Module I Wildland Firefighter	43.0203	WF1.BTC	N/A	Fire Service Technologies	Idaho Falls, ID	Regional	Lecture/Lab
EITC	Module II Adv. Wildland Firefighter	43.0203	WF2.BTC	N/A	Fire Service Technologies	Idaho Falls, ID	Regional	Lecture/Lab
EITC	Module III Single Resource Boss	43.0203	WF3.BTC	N/A	Fire Service Technologies	Idaho Falls, ID	Regional	Lecture/Lab
EITC	Module IV strike Team/Task Force	43.0203	WF4.BTC	N/A	Fire Service Technologies	Idaho Falls, ID	Regional	Lecture/Lab
EITC	Wildland Fire Management	43.0203	WFM.AAS	N/A	Fire Service Technologies	Idaho Falls, ID	Regional	Lecture/Lab

Institution	Program Title	CIP Code	Degree Level/ Certificate	Options/Minors/ Emphases	College/Dept.	Location(s)	Regional/ Statewide	Method of Delivery
CSI	Veterinary Technology/Assistant	51.0808	AAS, ITC		Agriculture	CSI Campus	Regional	Traditional with some portion avail online
EITC	Carpenter Apprentice	47.0000	APC.AAS	N/A	Apprenticeship Technologies	Idaho Falls, ID	Regional	Lecture/Lab
EITC	Electrical Apprentice	47.0000	APE.AAS	N/A	Apprenticeship Technologies	Idaho Falls, ID	Regional	Lecture/Lab
EITC	Heating & Air Conditioning Apprentice	47.0000	APH.AAS	N/A	Apprenticeship Technologies	Idaho Falls, ID	Regional	Lecture/Lab
EITC	Instrument Mechanic Apprentice	47.0000	API.AAS	N/A	Apprenticeship Technologies	Idaho Falls, ID	Regional	Lecture/Lab
EITC	Lineman Apprentice	47.0000	APL.AAS	N/A	Apprenticeship Technologies	Idaho Falls, ID	Regional	Lecture/Lab
EITC	Locksmith & Safe Repair Apprentice	47.0000	APS.AAS	N/A	Apprenticeship Technologies	Idaho Falls, ID	Regional	Lecture/Lab
EITC	Machinist Apprentice	47.0000	APM.AAS	N/A	Apprenticeship Technologies	Idaho Falls, ID	Regional	Lecture/Lab
EITC	Maintenance Mechanic Apprentice	47.0000	APT.AAS	N/A	Apprenticeship Technologies	Idaho Falls, ID	Regional	Lecture/Lab
EITC	Painter Apprentice	47.0000	APP.AAS	N/A	Apprenticeship Technologies	Idaho Falls, ID	Regional	Lecture/Lab
EITC	Pipe Fitter Apprentice	47.0000	APF.AAS	N/A	Apprenticeship Technologies	Idaho Falls, ID	Regional	Lecture/Lab
EITC	Plumbing Apprentice	47.0000	APB.AAS	N/A	Apprenticeship Technologies	Idaho Falls, ID	Regional	Lecture/Lab
EITC	Sheet Metal Mechanic Apprentice	47.0000	APA.AAS	N/A	Apprenticeship Technologies	Idaho Falls, ID	Regional	Lecture/Lab
EITC	Welder	47.0000	APW.AAS	N/A	Apprenticeship Technologies	Idaho Falls, ID	Regional	Lecture/Lab
EITC	Automotive Automatic Transmission & Transaxle Specialist	47.0604	ATA.BTC	N/A	Automotive Technologies	Idaho Falls, ID	Regional	Lecture/Lab
EITC	Automotive Brake Specialist	47.0604	ATB.BTC	N/A	Automotive Technologies	Idaho Falls, ID	Regional	Lecture/Lab
EITC	Automotive Electronic Specialist	47.0604	ATL.BTC	N/A	Automotive Technologies	Idaho Falls, ID	Regional	Lecture/Lab
EITC	Automotive Engine Performance Specialist	47.0604	ATE.BTC	N/A	Automotive Technologies	Idaho Falls, ID	Regional	Lecture/Lab
EITC	Automotive Engine Repair Specialist	47.0604	ATR.BTC	N/A	Automotive Technologies	Idaho Falls, ID	Regional	Lecture/Lab
EITC	Automotive Heating & Air Conditioning Specialist	47.0604	ATH.BTC	N/A	Automotive Technologies	Idaho Falls, ID	Regional	Lecture/Lab
EITC	Automotive Power Trains, Suspension & Steering Specialist	47.0604	ATP.BTC	N/A	Automotive Technologies	Idaho Falls, ID	Regional	Lecture/Lab
EITC	Automotive Technology	47.0604	ATP.BTC	N/A	Automotive Technologies	Idaho Falls, ID	Regional	Lecture/Lab
EITC	Automotive Technology	47.0604	AT.ATC	N/A	Automotive Technologies	Idaho Falls, ID	Regional	Lecture/Lab
EITC	Automotive Technology	47.0604	AT.ITC	N/A	Automotive Technologies	Idaho Falls, ID	Regional	Lecture/Lab
EITC	Welding Technology	48.0508	WLD.AAS	N/A	Welding Technologies	Idaho Falls, ID	Regional	Lecture/Lab
EITC	Welding Technology	48.0508	WLD.ATC	N/A	Welding Technologies	Idaho Falls, ID	Regional	Lecture/Lab
EITC	Welding Technology	48.0508	WLD.ITC	N/A	Welding Technologies	Idaho Falls, ID	Regional	Lecture/Lab
EITC	Dental Assisting	51.0601	DTL.ITC	N/A	Dental Technologies	Idaho Falls, ID	Regional	Lecture/Lab
EITC	Medical Assisting	51.0801	MA.AAS	N/A	Medical Assistant Technologies	Idaho Falls, ID	Regional	Lecture/Lab
EITC	Surgical Technology	51.0909	SRT.AAS	N/A	Surgical Technologies	Idaho Falls, ID	Regional	Lecture/Lab
EITC	Office Professional	52.0401	OFP.AAS	N/A	Office Technologies	Idaho Falls, ID	Regional	Lecture/Lab
EITC	Office Specialist	52.0401	OFS.ITC	N/A	Office Technologies	Idaho Falls, ID	Regional	Lecture/Lab
ISU	Workplace Training Leadership	52.1005	BS	Options	Education	CSI Campus	Regional	Hybrid
BSU	Intermediate Basque		Certificate, Undergraduate		Arts & Sciences/ World Languages	Boise	Regional	Traditional
BSU	Spanish for Business			Minor	Arts & Sciences/ World Languages	Boise		
CSI	Welding Technology	48.0508	AAS, ITC, BTC		Trade & Industry	CSI Campus	Regional	Traditional with some portion avail online

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SUBJECT

Program Prioritization – Implementation Update

REFERENCE

May 2013	The Board directed institutions to institute a program prioritization process consistent with Robert Dickeson's prioritization principles, and further directed the institutions to use a quintile prioritization approach and communicate to the Board the criteria and weighting to be used after consultation with their respective campuses.
June 2013	The Board approved the program prioritization proposals for Idaho State University, Boise State University, and University of Idaho as presented.
August 2013	The Board approved the program prioritization proposal for Lewis-Clark State College as presented.
October 2013	The Board was presented with an update on program prioritization.
August 2014	The Board was presented with the final results of program prioritization.
June 2015	The Board was presented with an update on program prioritization implementation.

APPLICABLE STATUTE, RULE, OR POLICY

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

BACKGROUND/DISCUSSION

In April 2016, Board Policy V.B. was amended. To require "Annual Program Prioritization updates…be submitted to the Board by the college and universities on the date and in a format established by the Executive Director."

In a guidance memo from the Board's Chief Financial and Academic Officers, dated May 11, 2016, the institutions' financial and academic Vice Presidents were notified that Executive Director Freeman had selected August as an ideal time for the institutions to provide these reports. The guidance memo also instructed the institutions that at minimum, their "presentations should touch upon the following areas:

- Brief description of significant programmatic actions which have been taken, if any, subsequent to the 2015 Program Prioritization update (discontinued, merged, re-sized programs, etc.)
- Any significant challenges/issues which will be worked in FY2017.

- Brief description of how Program Prioritization is integrated into the institution's strategic planning, programming, and budgeting process.
- Relationship of Program Prioritization process/decisions to the FY2018 budget request, as applicable."

IMPACT

Program prioritization requires the institutions to conduct an evaluation of programs and services with specific and tangible objectives (goals), and with a focus on specific evaluation criteria rather than generalized across-the-board cuts. Implementation of program prioritization based on Dickeson's framework provides the Board with assurances of consistency and presents the institutions with a unique opportunity to evaluate old paradigms that may no longer make sense, with a specific focus on their Mission, Core Themes and Strategic Plans. The process provides a method to objectively review program efficiency and effectiveness. Based on the outcome of the program prioritization process "decisions can be made that, at the minimum, inform future budget decisions, and can also lead to enrichment of some programs that are under-resourced while at the same time reducing or even eliminating still others."

The impact of implementing program prioritization will ensure that guiding principles are carried forward as standard aspects of institutional administration.

ATTACHMENTS

STAFF COMMENTS AND RECOMMENDATIONS

These presentations are an opportunity for the Board and the institutions to glimpse into the institutionalization of program prioritization on the four-year campuses, and to see how the institutions are assimilating the principles of program prioritization into the planning, programming, budgeting, and performance tracking processes.

Each institution has prepared a written report per the Guidance Memo referenced above and included as Attachment 1. The institutions will also provide an oral report to the Board as part of the agenda item.

BOARD ACTION

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

IDAHO STATE BOARD OF EDUCATION
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208-334-2270 | FAX: 208-334-2632
email: board@osbe.idaho.gov

To: Provosts
Vice Presidents for Finance & Administration

From: Chris Mathias and Chet Herbst

Date: May 11, 2016

Re: Program Prioritization – August 2016 reports

Background. At the June 2015 Board meeting, institutions gave presentations on their Program Prioritization (PP) initiatives. Topics covered during the summative reports included highlights of 2014 PP outcomes and progress reports, discussion of challenges/opportunities identified in the process, impacts related to accreditation, and discussion of how the PP process has been normalized as an integral element of strategic planning/program planning/budget planning at the institution.

Policy on Annual PP Reports. In December 2015, the Board amended Policy V.B. to include a new section (V.B.11) which addresses Program Prioritization:

> a. *"Program Prioritization" is a process adopted by the Board in setting priorities and allocating resources among programs and services with a specific focus on Mission, Core Themes and Strategic Plans.*
>
> b. *Program Prioritization shall be incorporated in the colleges and universities' annual budgeting and program review process.*
>
> **c. *Annual Program Prioritization updates are to be submitted to the Board by the colleges and universities on the date and in a format established by the Executive Director.***

Instructions for 2016 Program Prioritization annual report. Institutions should prepare and present update reports on their PP initiatives at the State Board meeting on August 11, 2016.

- Prepare oral reports, accompanied by slides.

- Presentations should be no longer than 10 minutes, followed by question and answer with Board members, as needed.
- Additional written summary materials, documents are optional, but, if provided, should be pitched at an "executive summary" level.
- Advance copies of presentation outlines and any (optional) supporting material should be delivered to the Board staff (along with other agenda materials) not later than July 11, 2016.
- Be prepared to provide an oral preview (detailed slides/written reports optional) at IRSA and BAHR meetings preceding the August meeting.
- Be prepared to briefly "walk through" your presentations at the joint Provost-Financial VP meeting on August 10th in Pocatello.
- As a minimum, *presentations should touch upon the following areas*:
    - Brief description of significant programmatic actions which have been taken, if any, subsequent to the 2015 PP update (discontinued, merged, re-sized programs, etc.)
    - Any significant challenges/issues which will be worked in FY2017.
    - Brief description of how PP is integrated into the institution's strategic planning, programming, and budgeting process.
    - Relationship of PP process/decisions to the FY2018 budget request, as applicable.

If you have questions, comments, or suggestions, please contact Chris Mathias (332-1592) or Chet Herbst (332-1565).

BOISE STATE UNIVERSITY

Boise State University
Program Prioritization Update Summer 2016

August 11, 2016

BOISE STATE UNIVERSITY

Four topics as they relate to our Program Prioritization efforts:

- Challenges
  - We face in FY17
- Integration
  - With processes (budget, programming, planning, etc.
- Programmatic
  - Changes during FY16
- FY18 Requests
  - Line item requests

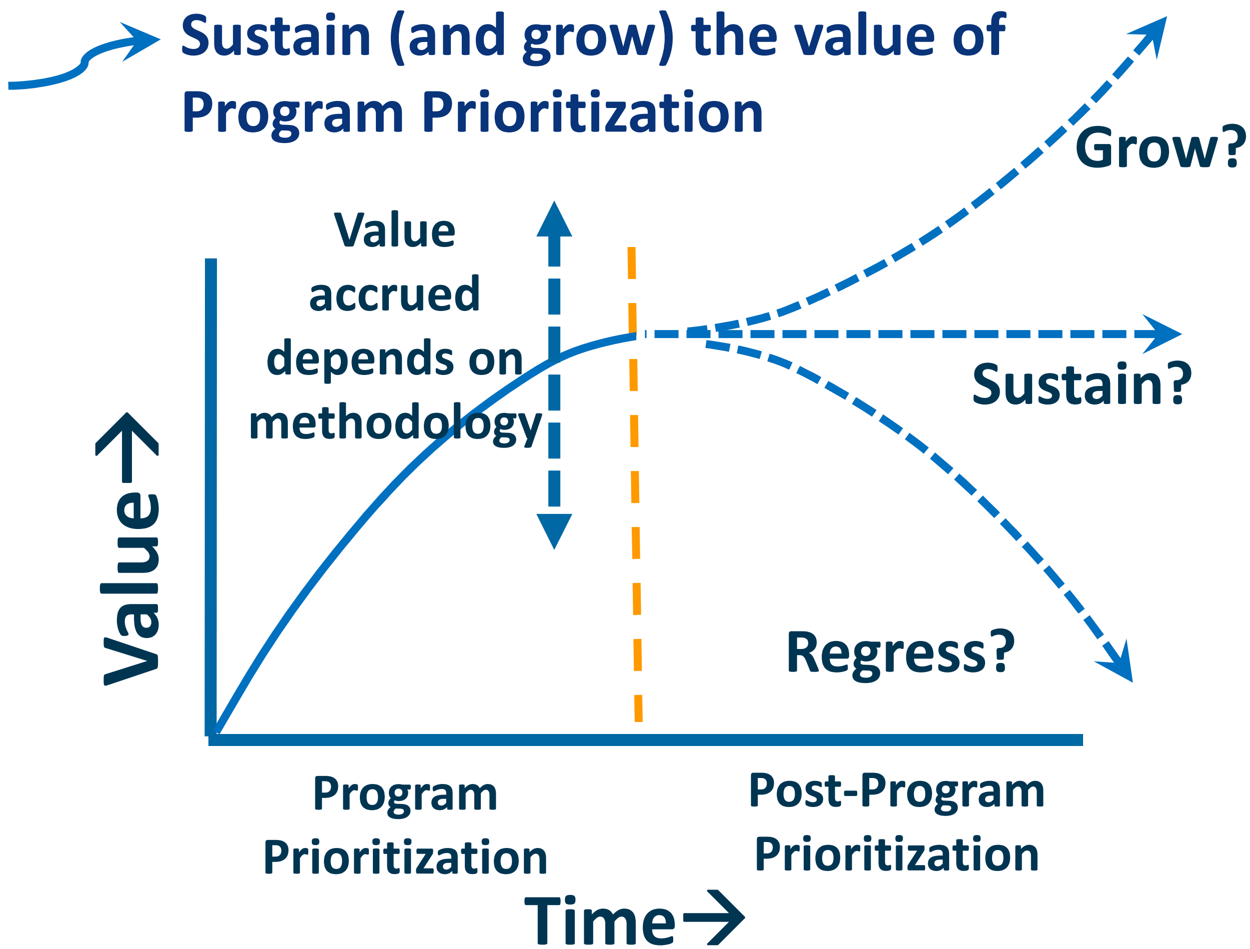
Address all four from standpoint of our primary challenge:

Sustain (and grow) the value of Program Prioritization

BOISE STATE UNIVERSITY

Four topics as they relate to our Program Prioritization efforts:

- **Challenges FY17**
- Integration
- Programs FY16
- FY18 Requests



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Four topics as they relate to our Program Prioritization efforts:

- **Challenges FY17** → Sustain (and grow) the value of Program Prioritization

5 Types of Value Gained:

- Programmatic changes
- Process changes
- Structural changes
- Create agents of change
- Change in Culture

Grow?

Sustain?

Regress?

- Integration
- Programs FY16
- FY18 Requests

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Four topics as they relate to our Program Prioritization efforts:

- Challenges FY17

Sustain (and grow) the value of Program Prioritization

- Integration
- Programs FY16
- FY18 Requests

5 Types of Value Gained:

- Programmatic changes
- Process changes
- Structural changes
- Create agents of change
- Change in Culture

Grow?

Sustain?

Regress?

Examples will be tied to the four topics

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- **Challenges FY17**
- Integration
- Programs FY16
- FY18 Requests

→Value from **Programmatic Changes**

- For example: new, discontinued, modified academic program
- Value created depends on changes being substantial in the first place
- Sustaining value requires move of resources as appropriate

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- **Challenges FY17**
- Integration
- **Programs FY16**←
- FY18 Requests

→Value from **Programmatic Changes**

- FY16 Programmatic Approvals
  - New Online Degree Completion Programs:
    - ✓ Bachelor of Applied Science and BA in Multidisciplinary Studies: ↑Access
    - ✓ Resources reallocated from other programs
  - New PhD in Ecology, Evolution, Behavior :
    - ✓ Integrated with undergraduate program
  - New BS in Public Health
    - ✓ Resources reallocated from other programs
  - New EdS in Educational Technology AND New MS in Biomolecular Sciences
    - ✓ Expanded access using existing resources
  - Discontinue 3 Graduate Certificates

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- **Challenges FY17**
- Integration
- **Programs FY16**←
- **FY18 Requests**←

→Value from **Programmatic Changes**

- FY16 Programmatic Approvals
  - New Online Degree Completion Programs:
    - ✓ Bachelor of Applied Science and BA in Multidisciplinary Studies: ↑Access
    - ✓ Resources reallocated from other programs
  - New PhD in Ecology, Evolution, Behavior :
    - ✓ Integrated with undergraduate program
  - New BS in Public Health
    - ✓ Resources reallocated from other programs
  - New EdS in Educational Technology AND New MS in Biomolecular Sciences
    - ✓ Expanded access using existing resources
  - Discontinue 3 Graduate Certificates
  - New PhD in Computing
    - ✓ Meets industry need
    - ✓ FY18 Line Item Request

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→Value from **Process Changes**

- Integrate principles of program prioritization into processes such as budgeting, planning, and program development

- **Challenges FY17**
- **Integration**←
- Programs FY16
- FY18 Requests

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- **Challenges FY17**
- **Integration←**
- Programs FY16
- FY18 Requests

→Value from **Process Changes**

- Revise Program Review
  - o Complete revamp
  - o Developed new three-pronged approach: "Integrated Review of Academic Programs"
    - ✓ Assess Program Learning Outcomes: uses Program Prioritization process
    - ✓ Annual Department Analytics Report: uses Program Prioritization metrics
    - ✓ Department Strategic Review and Action Planning: Facilitated planning sessions

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- **Challenges FY17**
- **Integration**←
- Programs FY16
- FY18 Requests

→Value from **Process Changes**

- Revise Program Review
- New Program Proposal Process
  - o During Program Prioritization:
    - ✓ Metrics for productivity
    - ✓ Flagged for low numbers of graduates
  - o At Boise State: "sunset clause" for new programs
  - o OSBE: proposal for new programs asks:
    - ✓ *What are thresholds to continue program: Enrollments and Graduates?*
    - ✓ *Logical basis for thresholds? What actions will result?*

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- **Challenges FY17**
- **Integration** ←
- Programs FY16
- FY18 Requests

→Value from **Process Changes**

- Revise Program Review
- New Program Proposal Process
- New Budget Model: Incentive-based
    - Before Program Prioritization:
        - ✓ Incremental; Little sensitivity to productivity, efficiency, quality, relevance
    - During Program Prioritization:
        - ✓ Metrics used to evaluate programs
        - ✓ Informed budgetary decisions
    - New Incentive-based Budget Model
        - ✓ Funding will follow productivity
        - ✓ Ensure quality & relevance

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- **Challenges FY17**
- **Integration←**
- Programs FY16
- FY18 Requests

→Value from **Process Changes**

- Revise Program Review
- New Program Proposal Process
- New Budget Model: Incentive-based
- Integrate into Accreditation
  - o During Program Prioritization
    - ✓ evaluated effectiveness of units: Relevance, quality, productivity, efficiency
  - o NWCCU standards: basis to evaluate contributions to mission of units
  - o Much work remains
    - ✓ Refine metrics to ensure valid evaluation
    - ✓ Develop evaluation protocols: "Integrated Review of Administrative and Support Units"

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- **Challenges FY17**
- **Integration←**
- Programs FY16
- FY18 Requests

→Value from **Process Changes**

- Revise Program Review
- New Program Proposal Process
- New Budget Model: Incentive-based
- Integrate into Accreditation
- Key in strategic planning
  - o "Refresh" during FY17
  - o Goals remain; update strategies
  - o Impact of Program Prioritization:
    - ✓ Awareness of constraints
    - ✓ Metrics for measuring progress

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- **Challenges FY17**
- **Integration** ←
- Programs FY16
- FY18 Requests

→Value from **Structural Changes**

- Changes to organizational structure
- Sustaining change requires:
  - Changes made are not trivial
  - Vigilance to ensure culture changes
  - That resources are moved as appropriate

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- **Challenges FY17**
- **Integration** ←
- Programs FY16
- FY18 Requests

→Value from **Structural Changes**

- Move University Health Services to College of Health Sciences: not trivial
  - Alignment with academic programs
  - Teaching & research clinical opportunities.
  - Expose of students to real world situations
  - Cost savings and revenue generation

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- **Challenges FY17**
- **Integration←**
- Programs FY16
- FY18 Requests

→Value from **Structural Changes**

- Move University Health Services to College of Health Sciences: not trivial
- Consolidate Testing Centers
  - o University Testing Services and Online Testing Center
  - o Consolidate organizationally and into same space
  - o Vigilance to preserve value:
    - ✓ Denial of requests to regress, e.g., partition space
    - ✓ Job descriptions changes to bridge the gap
    - ✓ Cross training across functions
    - ✓ Made the most of new potential: e.g., expansion to accommodate SAT tests

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- **Challenges FY17**
- **Integration←**
- Programs FY16
- FY18 Requests

→Value from **Structural Changes**

- Move University Health Services to College of Health Sciences: not trivial
- Consolidate Testing Centers
- Consolidate business functions in Campus Operations
  - Found substantial duplication and inconstancy across division
  - Created an integrated business operations unit at the division level
  - Persistence depends on success

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- **Challenges FY17**
- **Integration←**
- Programs FY16
- FY18 Requests

→Value from **Structural Changes**

- Move University Health Services to College of Health Sciences: not trivial
- Consolidate Testing Centers
- Consolidate business functions in Campus Operations
- Revise first year advising: underway
  - o Program Prioritization revealed inconsistency freshmen advising
  - o Also: inconsistent use of new software tools
  - o Response: Centralize freshman year advising
  - o Needed to sustain value:
    - ✓ Non-trivial changes
    - ✓ Cultural changes
    - ✓ Success of new model

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- **Challenges FY17**
- **Integration←**
- Programs FY16
- **FY18 Requests←**

→Value from **Structural Changes**

- Move University Health Services to College of Health Sciences: not trivial
- Consolidate Testing Centers
- Consolidate business functions in Campus Operations
- Revise first year advising: underway
- Created School of Public Service
  - o Revamped mission of set of departments
  - o Maximizing value requires:
    - ✓ Programmatic changes
    - ✓ Cultural changes
    - ✓ Investment in new programs: FY18 Line Item Request

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- **Challenges FY17**
- Integration
- Programs FY16
- FY18 Requests

→Value from **Creating "Agents of Change"**

- Create entities that create change
- Systems and Process Improvement Unit
  - Created to facilitate process improvement
  - First Quintile although brand new
    - ✓ Therefore: Invest and utilize
  - Recent huge role: Implementation of Oracle Financial Cloud
  - Typically:
    - ✓ A project by IT imposed on the rest of campus
    - ✓ No change to underlying business processes
    - ✓ Change "managed"
    - ✓ Hope for the best
  - Instead: S&PI facilitated change
    - ✓ Change of underlying business processes

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- **Challenges FY17**
- Integration
- Programs FY16
- **FY18 Requests**←

→Value from **Creating "Agents of Change"**

- Create entities that create change
- Systems and Process Improvement Unit
- College of Innovation and Design
  - Grew out of Program Prioritization
  - Subsequent creations:
    - ✓ BS Games, Interactive Media, Mobile
    - ✓ Vertically Integrated Projects
    - ✓ Human-Environment Systems
  - Further investment in new programs: FY18 Line Item Request

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- **Challenges FY17**
- Integration
- Programs FY16
- FY18 Requests

→Value from **Changes in Culture**

- For example: accountability, awareness of importance of productivity, etc.
- Sustaining value requires:
  - o Change in processes, policies, structures
  - o Reminders of commitments, etc.

  → example: actions planned and completed by academic departments

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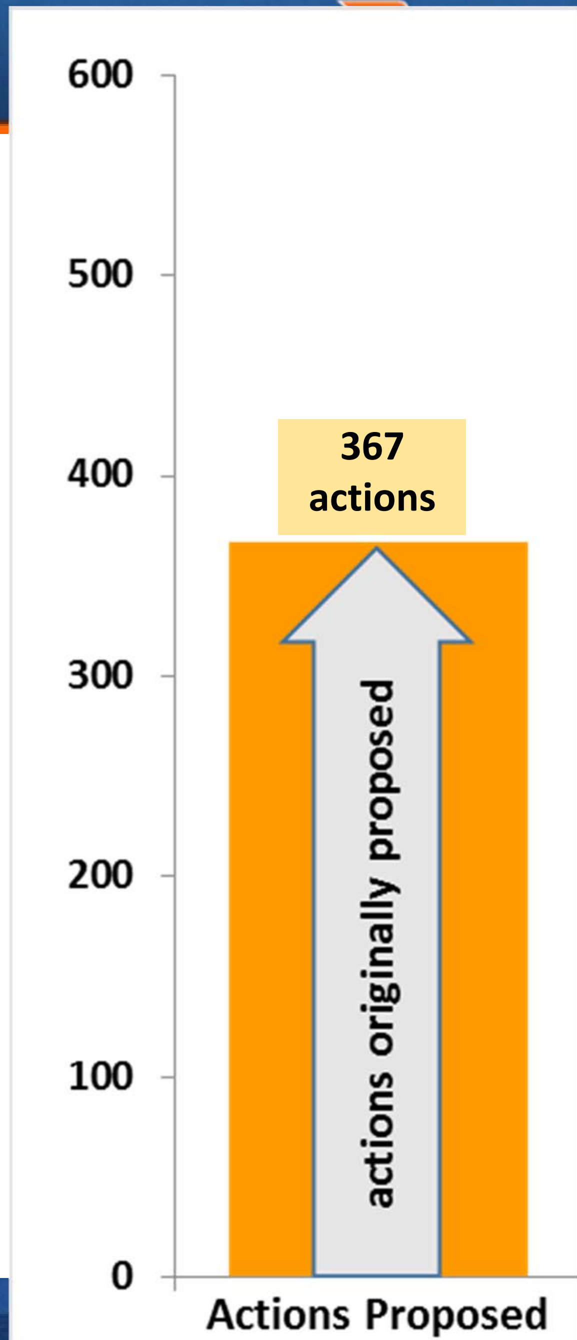
Actions planned and completed from 45 Academic Departments

Examples:

Management: create program coordinator position

English: shift administrative duties from faculty to staff

Bilingual Ed: develop new ENL endorsement



→Value from **Changes in Culture**

Physics: new emphases to attract students

Sociology: survey alums re: career paths

Mechanical Engr: implement grad-level assessment

Anthropology: smaller section sized to increase student success

Music: implement sophomore level assessment

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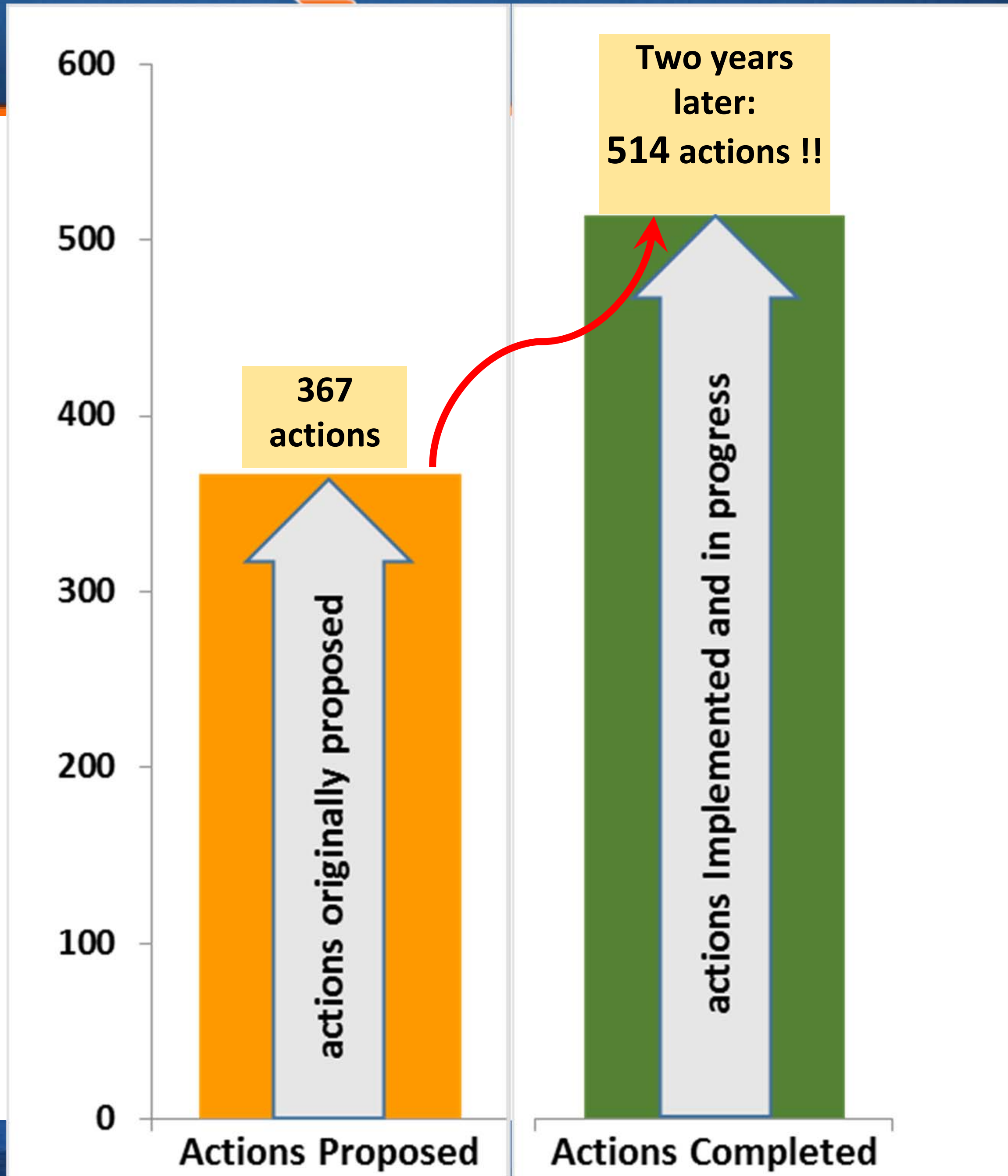
Actions planned and completed from 45 Academic Departments



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Program Prioritization Report

Dr. Laura Woodworth-Ney
Provost/Vice President for Academic Affairs

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Program Prioritization | Focus

- Program Assessment determines whether a program is meeting intended outcomes (learning and productivity)
- Demonstration of program productivity through a formal program assessment process is key to support growth and demonstrate need for increased, reallocated, or new resources.
  - Outcomes of academic program health focuses on graduation rates
  - Academic Affairs assigns academic program goals
  - Guides the Colleges' 3-year employee hiring plans
  - Program goals align with the strategic plan and mission fulfillment goals

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Program Prioritization | Academic Measures

- **When evaluating full degree programs and certificates:**
  - **Programs are flagged and must prepare an appropriate plan to address low enrollment if they have a five year average number of graduates**

- **≤5 at the associate and certificate level**
- **≤10 at the undergraduate level**
- **≤5 at the master's level**
- **≤3 at the doctoral level**

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Program Prioritization
2015-2016 Academic Updates

- Completed all phases of the program prioritization process
- Academic program health is incorporated into ISU's annual planning and transitioning into the budgetary processes
- Focused on the program health of non-academic units

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Project Prioritization
Example of an Academic Program Evaluation

	Description	Degree Level	Major	No. of degrees awarded for 5 years	5 year avg	Capacity	Majors FALL 2014 (EOT)	UNDER/ OVER CAPACITY	Responses
35	**Community & Public Health**	MHE	**Health Education**	31	**6.2**	12	26	**14**	
45	**Community & Public Health**	MPH	**Public Health**	34	**6.8**	30	30	**0**	
36	**Community & Public Health**	BA	**Sec Ed-Health Education (SS)**	1	**0.2**				The Secondary Education in Health major and minor is offered jointly through the College of Education. This is a small niche program. The courses required for the Secondary Education – Health Education major and minor duplicate those required for the other Health Education tracks, with one exception, Curriculum and Methods in Health Education. Therefore, the Secondary Education – Health Education major and minor have minimal impact on departmental resources.
37	**Community & Public Health**	BS	**Sec Ed-Health Education (SS)**	3	**0.6**				
38	**Community & Public Health**	BA	**Sec Ed-Health Education (wm)**	2	**0.4**				
39	**Community & Public Health**	BS	**Sec Ed-Health Education (wm)**	3	**0.6**				
40	**Dietetics**	CER	**Dietetics**	0	**0**	18	19	**1**	See note on page 2.
41	**Dietetics**	BS	**Dietetics**	84	**16.8**	20	20	**0**	

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Program Prioritization
Academic Unit Outcomes

- **As part of the assessment and improvement process, the academic units received the following guidance:**
  - **Units use benchmarks to target for increased enrollment and retention**
  - **Programs not showing progress are reassessed in Spring 2019 and must address either restructure, consolidation, or closure**
  - **The academic units monitor progress annually and report on shortfalls**

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Program Prioritization
Academic Unit Outcomes

- **2016-2017 Academic Year**
  - **Increase domestic enrollment of new students in targeted programs:**
    - **3% for Idaho residents**
    - **3% for out-of-state domestic**
  - **Increase overall retention rate by 3.9%**
- **2017-2018 Academic Year**
  - **Increase domestic enrollment of new students in targeted programs:**
    - **4% for Idaho residents**
    - **4% for out-of-state domestic**
  - **Increase overall retention rate by 4%**
- **2018-2019 Academic Year**
  - **Increase domestic enrollment of new students in targeted programs:**
    - **4% for Idaho residents**
    - **4% for out-of-state domestic**
  - **Increase overall retention rate by 4.1%**

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Program Prioritization
Academic Unit Outcomes

Academic Affairs will evaluate degree production annually and meet strategic benchmarks

- 2016-2017 Academic Year
  - Increase the number of undergraduate degrees awarded by 1.3%
- 2017-2018 Academic Year
  - Increase the number of undergraduate degrees awarded by 2.6%
- 2018-2019 Academic Year
  - Increase the number of undergraduate degrees awarded by 2.6%

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Program Prioritization
Academic 3-Year Hiring Plan

- **Using program health, Academic Affairs requires units to quantifiably justify filling vacant positions before requesting open faculty and staff lines**

Position/Hiring Rank	Unit	Programs	Combined Program Enrollment (Majors) for Last Available Term
Assistant Physical Therapy Program Director (12 month)	Department of Physical and Occupational Therapy	DPT	Expand by 72
Physical Therapy Director of Clinical Education (12 month)	Department of Physical and Occupational Therapy	DPT	Expand by 72
Physical Therapy Clinic Director (12 month)	Department of Physical and Occupational Therapy	DPT	Expand by 72

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Program Prioritization
Academic 3-Year Hiring Plan

- **AA Response to Three-Year Hiring Plan:**
  - Academic Affairs supports the (academic unit's) Three-Year Hiring Plan
  - Additional changes are likely due to the new funding as part of the future budget allocations

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Program Prioritization | Aligning the Academic Process to the Budget and Strategic Plan

- For 2017, the IEAC approved increases to funding for programs based on their alignment to the strategic plan's goals to support mission fulfillment
- Colleges received enrollment program goals for Academic Year 2017-2018 that aligned with the strategic plan's goals

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Program Prioritization | Conclusion

- **ISU fully implemented the Program Prioritization Program into its planning process using the Strategic Plan benchmarks**
  - **Academic units receive specific program growth and outcome goals by academic year**
  - **Increases to program budgets require justification and alignment with the strategic plan**
  - **Academic units' submit their hiring plans based on their programs' health**

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Questions?

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Non-Academic Program Prioritization

August 2016 Update

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Idaho State UNIVERSITY

Actions Subsequent to 2015

- Mergers and Realignments implemented to improve efficiency and effectiveness
  - Examples: ITS & Student Affairs combined telephone switchboard staffing eliminating duplication; Controllers office transferred sr. financial analyst to Treasury; Financial Aid transferred associate director position to facilities for reclassification as a project manager ;Scholarship office realigned moving from Financial Aid to Enrollment Management; Office of General Counsel restructured and realigned positions to optimize efficiency and effectiveness.
- Discontinued and Re-sized
  - Examples: ITS graveyard data center operator position discontinued with efficiencies gained through Banner and a new hardware platform; Facilities re-sized and re-aligned positions to improve service levels. HR restructured a position to align with needs and enabled salary savings to shift to higher priority programs.
- Ongoing evaluation
  - IPAS reviews drive ongoing evaluation of positions and their alignment with the mission of the University.
  - HR prepares annual organizational review for Finance & Administration providing metrics and benchmarking with Idaho peer institutions

Program Prioritization Savings

- Program prioritization actions resulted in recurring annual savings
- Plans in place to achieve additional savings
- New opportunities identified since 2015 update
- FY2017 budget revision underway and opportunities for savings are under evaluation

Program Prioritization Budget Integration

- Units are encouraged to take a “bottoms up” view of their resources through program prioritization to determine whether existing programs or activities may be accomplished more efficiently, streamlined, or eliminated.
- Requests for funding of additional resource requests need to come from a reallocation of existing resources.
- Throughout the budgeting process, resource reallocation and alignment with the University’s strategic plan and cores themes are highlighted and reinforced in the Institutional Effectiveness and Assessment Council (IEAC)
- In depth evaluation of budget methodologies resulted in the design of a draft hybrid model, blending elements of formula funding and performance based budgeting which enable application of formula-based adjustments to drive alignment as revenues (student credit hours) increase or decrease. Implementation will require extensive work to develop performance parameters and targets for each unit to be simulated in a forecast model for the strategic financial planning period.

Relationship of PP process/decisions to FY2018 budget request

- Emphasize the use of metrics in measuring performance to support decisions to commit funds to projects and programs with the highest potential return on investment.
    - Illustrated by the University's two line item requests -- Idaho Falls Polytech Initiative and the Center for Education Innovation partnership with the College of Southern Idaho utilizing collaborations to meet demand and take advantage of opportunities to improve access for students, increase research and economic development, innovation in training, increased professional development support for educators, and the potential for attracting new high tech energy related industries.
- Continued focus on delivery of process improvement, cost saving and revenue generating ideas from the bottom up
- Program prioritization provides better data for improved program planning and funding request decisions, thereby helping realize the mission and vision of the University

QUESTIONS?

discover OPPORTUNITY

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Idaho State University 6

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Recap of "Focus for the Future" Program Prioritization Process:
A Provost and Faculty Senate discussion on "lessons learned" and next steps

On October 27, 2015, Provost John Wiencek addressed faculty senate with a summary on the State Board's mandated program prioritization process. The full minutes of this meeting are available online (http://www.webpages.uidaho.edu/facultycouncil/2015-16FS/Minutes/FS15-16mtg9(10-27-15).pdf). The following is a paraphrasing of these faculty senate minutes.

Provost Wiencek summarized the process that occurred in the prior year or two as the University of Idaho embarked on the task of program prioritization per Board mandate. As a person new to the UI, he provided his assessment of what went well and where there were opportunities for improvement. In summarizing his general observations Provost Wiencek noted that:

1. There was a lot of narrative although it wasn't always clear how these narratives factored into the overall result.
2. The process involved a lot of effort and dedication from staff and faculty. Their engagement was a positive part of the process and indicated the seriousness with which all undertook this process.
3. Given the overreliance on narrative and self-assessment tools, the process isn't sustainable in its current form. A more unbiased and effective set of measures should be developed.
4. We fulfilled what the Board wanted, despite the fact that there were some misunderstandings along the way.
5. The measurements of non-academic programs were uneven and that will need to be addressed in the future.
6. The Board will expect future budget requests to be directed to high priority programs.
7. The Board expects program prioritization to be incorporated into the university's annual budgeting, strategic planning and program review processes.
8. We need to create a more automated process in some areas, while also recognizing that some things cannot be automated.
9. Quality is a hard thing to assess and we must make sure that there is appropriate space for qualitative analysis that is not biased (i.e. something other than the self-evaluation tools that were utilized in this PP process).

Provost Wiencek emphasized the need for a fresh start. Looking forward, the Provost stated that we needed to align this process with our strategic goals such as the need to increase enrollment. We need to attract out-of-state students who want to come here because of distinctive programs not available elsewhere. Nationally ranked programs create a "halo effect" which helps to make the whole system thrive. To do this we will need to be innovative and look for places where we can be excellent. Integrated planning will be an important part of our success. We will need to think about vacant lines and moving funds into high priority areas.

At the conclusion of the meeting, various senators expressed their pleasure with the straight-forward and honest presentation and thanked the Provost for providing this clear overview. They felt that the changes he had outlined were positive and that we shouldn't get too bogged down in a retroactive analysis of what happened in the past. It can be very damaging and time consuming to continually have to go through these processes so the faculty were willing to participate in further refinements to the Program Prioritization process with the expectation that faculty perspective would be included in future modifications. There was agreement that the process needs to become much more transparent.

PROGRAM PRIORITIZATION UPDATE AUGUST 2016

JOHN WIENCEK
PROVOST AND EXECUTIVE VICE PRESIDENT

BRIAN FOISY
VICE PRESIDENT FOR FINANCE

University of Idaho

Program Prioritization

SUMMARY / REQUESTED UPDATES

1. New leadership & new processes
2. Significant programmatic actions subsequent to August 2015 PP report
3. Significant challenges/issues for FY17
4. How is PP integrated (Strategic Planning, Programming and Budget)
5. Relationship of PP to FY18 requests

University of Idaho

Program Prioritization / FY16

NEW LEADERSHIP & PROCESSES

Review of PP steps taken and path forward

- Provost called Board Members to get feedback
- Attended ISU Dashboard demonstration and have had follow-up discussions
- Provost / Faculty Senate discussion - past process, outcomes, improvements going forward
- Institutional Research
  - Changed from Data Reporting Unit to Decision Support Unit
  - Purchased/Implementing new SAS analytic tools for Dashboard implementation
- Improved / automated process being developed and implemented in FY17

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Program Prioritization / FY16

NEW LEADERSHIP & PROCESSES

Development of a nine-year Strategic Plan through broad participation

- Aligned SBOE Performance Measures, Program Prioritization and NWCCU Accreditation
- Included integrated planning and assessment
- Added data driven benchmarks

Re-focused the University Budget and Finance Committee

- Broad representation
- Process for requesting new funding (both one time and recurring) that addresses strategic needs
- Committee recommended list for investment to President
- Process developed a Cabinet-level awareness of campus needs/requests
- Approved FY17 investments -partially funded by FY15 PP and other reallocations
- Defined FY18 line item requests

University of Idaho

Program Prioritization

PROGRAMMATIC ACTIONS SINCE 2015 UPDATE

- Consolidation of select IT functions
- Reinvestments/reallocations from FY 2015 Program Prioritization Efforts
  - CNR Fish Physiologist Faculty Position (salary and start up) FY16 (Q1)
  - Bioregional Planning Faculty Director (salary and start up) FY16 (new)
  - Tribal Relations Office (Powwow and program staff) FY16
  - Graduate Admissions Electronic Application Process FY16 (Q1)
  - Senior Associate Vice President for Research FY16 (Q3 & Q4)
  - Writing Center (student staff and operations) FY17 (Q4)
  - Philosophy Faculty Position (salary) FY17 (Q4)
  - Library Personnel to staff 24/5 operations FY17 (Q1)
- Additional process improvements
  - Streamlining the Hiring Process and other payroll processes
  - Decision to close the Caine Research Center
  - Transition from EIPRS to iMedIRIS for Research Administration

Program Prioritization

WORK PLAN FOR FISCAL YEAR 2017

- Institutional Planning and Effectiveness (IPE) Committee (August 2016)
  - Charged with overall implementation of integrated planning, programming and budget
- Cascaded Strategic Plans with unit-level goals and metrics (Fall 2016)
- Continued transition away from incremental budgeting (FY17)
- Program Prioritization Improvements (FY17)
  - Less labor intensive
  - More quantifiable
  - Use of dashboard/data for assessment and decision making
  - Transparent linkage to resource allocation, primarily through position control

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Program Prioritization

WORK PLAN FOR FISCAL YEAR 2017

- Continued Process Improvements
  - Chart of Accounts
  - Standardized financial management reports
  - Development of decision support dashboards and management analytics
  - Market-based compensation
  - Reorganize Provost's office to improve student outcomes (e.g. Center for Student Achievement)
  - Move away from distributed staffing models
  - Realign staff by function to create efficiencies and consistency

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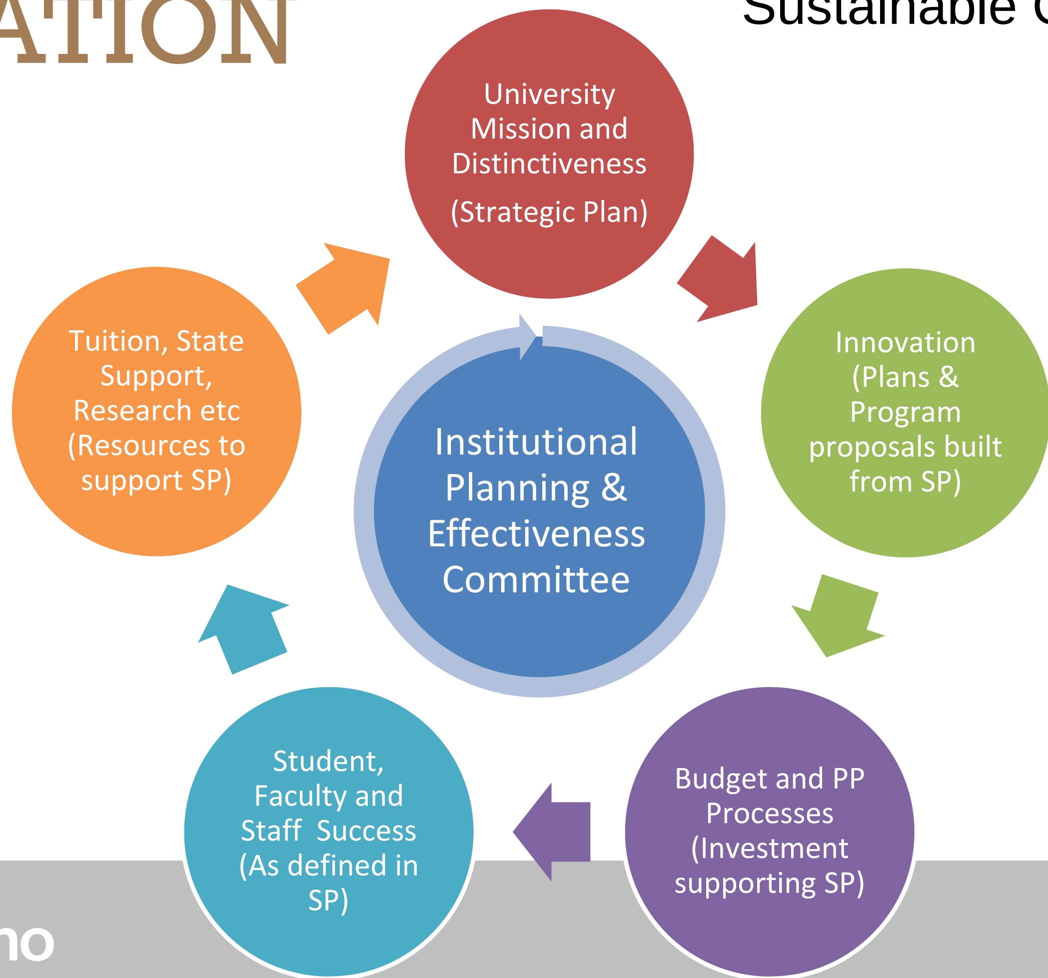
Program Prioritization

INTEGRATION

Building a Progressive and Sustainable Cycle



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Program Prioritization

INSTITUTIONALIZING PP

Position Control to institutionalize Program Prioritization

- Burnett memo (similar statement in final FFF report to SBOE, June 2015)

  Prioritized ~~Faculty~~ hiring. All new and vacated ~~faculty~~ positions must be invested in high-level University strategic priorities …. No ~~faculty~~ investments will be made in low priority areas. Thus, ~~faculty~~ resources will migrate, beginning immediately, to higher University and State of Idaho priorities….”

- IPE Committee will reframe PP with following objectives (per Faculty Senate discussion):
  - Comprehensive Taxonomy of All Units – Academic and Non-academic
  - Refinement of criteria and weights to a limited set of objective measures (likely different approaches for academic vs non-academic units)
  - Development and implementation of appropriate dashboards and management tools in support of PP process and to promote transparency
  - Implementation prior to end of FY 17

University of Idaho

Program Prioritization

INSTITUTIONALIZING PP

How it will work ….

- Employee (faculty or staff) departs UI
- Departure triggers payroll changes (so that the person no longer gets paid) which in turn triggers enquiry on program quintile
- Based on agreed upon policy, vacated salary appropriately reallocated
- Potential reallocation policy

  Q1 – Sufficient vacant position funds remain in unit to make a competitive offer
  Q2 – Vacant position funds reallocated to dean or mid-level director
  Q3 – 50/50 Vacant position funds reallocated to mid-level and Vice President
  Q4 – Vacant position funds reallocated to Vice President
  Q5 – Vacant position funds reallocated to central administration

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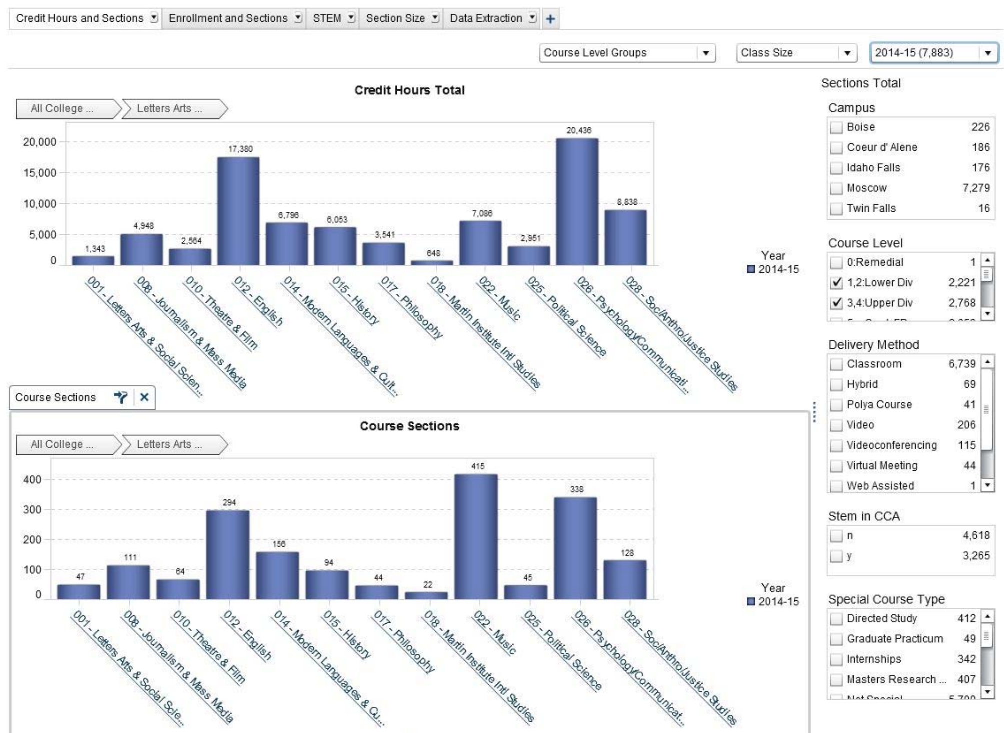
Program Prioritization

DASHBOARDS

Faculty and staff want clear articulation of important measures of progress in a readily accessible format



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Program Prioritization

RELATIONSHIP TO FY2018 REQUESTS

- Outcomes Based Funding (Through SBOE Request)
  - Increasing number of graduates (Baccalaurate)
    - Center for Student Achievement
    - Data-driven resource allocations via Program Prioritization
- Library database
  - Supplement current funding as prioritized by UBFC recommendations
  - Increase research database in support of Strategic Plan Goal 1

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Program Prioritization Progress Report

Dr. Lori Stinson
Provost / VP for Academic Affairs

Dr. Andrew Hanson
VP for Student Affairs

August 11, 2016

Goals

Support Strategic Plan Goals

- **Outcome 1:** Sustain and enhance excellence in teaching and learning
- **Outcome 2:** Optimize student enrollment and promote student success
- **Outcome 3:** Strengthen and expand collaborative relationships and partnerships
- **Outcome 4:** Leverage resources to maximize institution strength and efficiency

Program Criteria

- Impact, quality, internal/ external demand, net revenue

Quintiles

- **All** instructional and non-instructional programs were quintiled – 115 in total
- **Expected Action**
  - **Q1:** Highly successful; seek additional resources
  - **Q2:** Highly successful; sustain current support
  - **Q3:** Successful; areas for improvement identified
  - **Q4:** Multiple elements needing improvement
  - **Q5:** Needs major review / restructuring

Programmatic Actions: Instructional Programs

- Q5 Instructional Program
  - Program overhaul; expansion
  - Summer School / Dual Credit
- Q3 Instructional Program
  - New partnership; revised curriculum
- Q1 Instructional Program
  - Health related programs expansion

Opportunities for FY17- IP

- **Strategic Enrollment**
- **Continued** integration of data
- **Continued** refinement of measureable, meaningful criteria

Programmatic Actions – non-Instructional Programs

- Q5 Clearwater Valley ETS
  - Reassigned to a different administrative unit and combined with a retention-focused TRIO program
- Q4 IPRA
- Q3 Grants and Contracts
  - Writing incentives/indirect formula
- Q1 New Student Recruitment
  - Expansion of recruitment staff and resources
  - "Recruiter"

Opportunities for FY17- nonIP

- **Strategic Enrollment**
- **Flexible assessment** methods to reflect the unique functions of non-instructional units
- **New** Vice President for Finance and Administration

Integration of PP - IP

- **Follow-up** continues on the various resource, action and work plans.
- **Budget** request alignment
- **Annual** reporting
- **Alignment** with program prioritization criteria and measures

PP and FY18 Budget - IP

- FY18 Line Item Requests – driven by program prioritization
  - **Instructional program** requests focused on two top quintile programs
  - **Seeking faculty positions** for program expansion and additional delivery modes such as online, hybrid

Integration of PP - nonIP

- **Budget** requests and priorities are connected to assessment and PP criteria
- **Planning** largely centers on enrollment, revenue, and compliance
- **Enhanced collaboration** with instructional programs (e.g., the Enrollment Plan)

PP and FY18 Budget - nonIP

- **FY18** Line Item Requests
  - **Veterans** Services Coordinator (Related to Q1 program and assessed need)
  - **Career** Counselors (Related to Q3 program and K-12 initiatives)
  - **Work-Scholars** (Related to Q1 and Q3 programs and expands a program shown to reduce student loan debt)

Thank you

Dr. Lori Stinson
Provost / VP for Academic Affairs

Dr. Andrew Hanson
VP for Student Affairs

August 11, 2016

BOISE STATE UNIVERSITY

SUBJECT

New self-support, online Graduate Certificate in Educational Gaming and Simulation

APPLICABLE STATUTE, RULE, OR POLICY

Idaho State Board of Education Governing Policies & Procedures, Section III.G. and Section V.R.

BACKGROUND/DISCUSSION

Boise State University proposes the creation of an online, self-support 15-credit graduate certificate program in Educational Games and Simulations, to be offered by the Department of Educational Technology. The new program will add to the array of self-support programs offered by the department: a Master of Educational Technology degree, an Ed.D. in Educational Technology, an Education Specialist degree (Ed.S.) in Educational Technology, and three graduate certificates.

The courses of study leading to these graduate certificates can be taken as specializations within the master's or Ed.S. programs or as stand-alone programs. The proposed program will provide students in this set of self-support programs with a broader set of choices; curricular choice plays a key role in student recruitment for self-support programs.

The coursework in the proposed program will produce graduates who will be able to (i) improve individualized learning by custom-designing and programming games and simulations for specific instructional needs and (ii) expertly gamify entire curricula at all levels and in all academic disciplines.

IMPACT

Students who will enroll in the proposed program will be from the same population of students presently served by our other self-support programs in Educational Technology. The population served is fully distinct from students enrolled in our traditionally-funded programs, and instead of paying traditional tuition and fees will pay separate fees of a self-support program. The program therefore meets the criteria for a self-support program as provided in Board Policy V.R., subsection 3.b.v.(a)(2).

Students in the proposed program will be in many of the same classes as students in the existing self-support, online programs offered by the department. Similarly, students in the existing programs will enroll in the three new classes that are being created for the proposed program.

The cost to a student of completing the proposed certificate program can be calculated as 15 credits times $379.33 per credit (the cost to students for master's level courses) for a total of $5,689.95.

The program will not require the use of any new state appropriated funds.

ATTACHMENTS

STAFF COMMENTS AND RECOMMENDATIONS

Consistent with Board Policy III.Z, no institution has the statewide program responsibility for educational technology programs at the certificate level. Additionally, Board Policy III.Z does not apply to programs for which 90% or more of all activity is required or completed online.

BSU also requests approval to assess a self-support program fee consistent with Board Policy V.R.3.b.v.(a) (2). Based on the information for the self-support program fee provided in the proposal, staff finds that the criteria have been met for this program.

The proposal went through the program review process and was recommended for approval by the Council on Academic Affairs and Programs (CAAP) on July 11, 2016 and to the Boards on Instruction, Research, and Student Affairs (IRSA) committee on July 21, 2016.

BOARD ACTION

I move to approve the request by Boise State University to create a new online, self-support program that will award a Graduate Certificate in Educational Gaming and Simulation in substantial conformance to the program proposal submitted as Attachment 1.

Moved by __________ Seconded by __________ Carried Yes _____ No _____

I move to approve the request by Boise State University to designate a self-support program fee for the Graduate Certificate in Educational Gaming and Simulation in the amount of $379.33 per credit in conformance with the program budget submitted to the Board in Attachment 1.

Moved by __________ Seconded by __________ Carried Yes _____ No _____

Institutional Tracking No. BSU 16-014

Idaho State Board of Education

Proposal for **Undergraduate/Graduate Degree** Program

Date of Proposal Submission:	
Institution Submitting Proposal:	Boise State University
Name of College, School, or Division:	College of Education
Name of Department(s) or Area(s):	Department of Educational Technology

Program Identification for Proposed New or Modified Program:

Program Title:	Graduate Certificate in Educational Gaming and Simulation					
Degree:	Graduate Certificate	Degree Designation		Undergraduate	x	Graduate
Indicate if Online Program:	x	Yes		No		
CIP code (consult IR /Registrar):	13.0501 Educational/Instructional Media Design					
Proposed Starting Date:	Fall 2016					
Geographical Delivery:	Location(s)	Online	Region(s)	Online		
Indicate (X) if the program is/has:	x	Self-Support		Professional Fee		
Indicate (X) if the program is:	x	Regional Responsibility		Statewide Responsibility		

Indicate whether this request is either of the following:

- [ ] New Degree Program
- [x] Undergraduate/**Graduate Certificates** (30 credits or more)
- [ ] Expansion of Existing Program
- [ ] Consolidation of Existing Program
- [ ] New Off-Campus Instructional Program
- [ ] Other (i.e., Contract Program/Collaborative

5/24/16			
College Dean (Institution)	Date	Vice President for Research (Institution; as applicable)	Date
John R Pelton	6-10-2016		
Graduate Dean or other official (Institution; as applicable)	Date	Academic Affairs Program Manager, OSBE	Date
Stacy Pearson p.p.	6-13-16		
EVP/Chief Fiscal Officer (Institution)	Date	Chief Academic Officer, OSBE	Date
	6/13/2016		
Provost/VP for Instruction (Institution)	Date	SBOE/Executive Director Approval	Date
	6/13/16		
President	Date		

Page 1

Before completing this form, refer to Board Policy Section III.G., Postsecondary Program Approval and Discontinuance. This proposal form must be completed for the creation of each new program. All questions must be answered.

Rationale for Creation or Modification of the Program

1. **Describe the request and give an overview of the changes that will result.** Will this program be related or tied to other programs on campus? Identify any existing program that this program will replace.

Boise State University proposes the creation of an online, self-support 15-credit graduate certificate program in Educational Games and Simulations, to be offered by the Department of Educational Technology. The new program will add to the array of programs offered by the department: a Master of Educational Technology degree (currently the largest educational technology master's program in America), an Ed.D. in Educational Technology, and an Education Specialist degree (Ed.S.) in Educational Technology that was recently approved by the State Board of Education. The proposed certificate also joins three other graduate certificates in the department. Those courses of study can be taken as specializations within the master's or Ed.S. programs or as stand-alone programs. The proposed program will follow in the mold of its predecessors and, as the department's fourth graduate certificate, it will provide students with a broader set of choices. Curricular choice plays a key role in student recruitment for self-support programs.

2. **Need for the Program**. Describe the student, regional, and statewide needs that will be addressed by this proposal and address the ways in which the proposed program will meet those needs.

The coursework in the proposed program will produce graduates who will be able to (i) improve individualized learning by custom-designing and programming games and simulations for specific instructional needs and who will be able to (ii) expertly gamify entire curricula at all levels and in all academic disciplines.

a. **Workforce need:** Provide verification of state workforce needs that will be met by this program. Include State and National Department of Labor research on employment potential. Using the chart below, indicate the total projected annual 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.

The NAEP recently described: "Learner performance assessment in virtual worlds and immersive games has been a recurrent theme in federal and foundation grant programs in the past few years (e.g., Ainsworth et al., 2005; MacArthur Foundation's Digital Media and Learning Initiative, 2006-2011; NSF Cyberlearning Task Force, 2008; National Education Technology Plan, 2010; NRC, 2011b; PCAST, 2010)." Furthermore, the National Academy of Sciences has reported, "Computer simulations and games can support the new, inquiry-based approaches to science instruction, providing virtual laboratories or field learning experiences that overcome practical and logistical constraints to student investigations. They can allow learners to visualize, explore, and formulate scientific explanations for scientific phenomena that would otherwise be impossible to observe and manipulate." The market for game-based learning is anticipated to grow to nearly $2.5 billion by 2017. As the industry and need for qualified professionals with a skill set in educational games and simulation continues to grow, professionals in the education field will be expected to be competent in the use and integration of educational gaming and simulation technology in their classrooms and schools.

List the job titles for which this graduate certificate is relevant:

1. Teachers who expertly gamify instruction at all levels and in all academic disciplines.
2. Curriculum directors and instructional designers who understand the value of individualized instruction for certain students, and of games and simulations as effective engagement strategies for all students.
3. Designers and programmers for companies that produce games and simulations for the education market.

	State DOL data	Federal DOL data	Other data source: (describe)
Local (Service Area)		234 (50% of state number)	
State		467 (0.5% of national number)	
Nation		93,470 (5% of existing # of postsecondary teachers employed nationally)	

Provide (as appropriate) additional narrative as to the workforce needs that will be met by the proposed program.

There are no job titles in Department of Labor databases that specifically describes the sort of position that the proposed certificate would qualify recipients to do. Instead, the proposed graduate certificate will have its greatest value in providing an avenue for advancement for existing teachers, primarily those in post-secondary positions. In the table above, we make the assumption that 5% of existing post-secondary teachers would benefit from and potentially pursue such a certificate. State numbers are a subset (0.5%) of national numbers, and local numbers are a subset of state estimates.

b. Student need. What is the most likely source of students who will be expected to enroll (full-time, part-time, outreach, etc.). Document student demand by providing information you have about student interest in the proposed program from inside and outside the institution. If a survey was used, please attach a copy of the survey instrument with a summary of results as **Appendix A.**

The Department of Educational Technology focuses its programs on working professionals who study part-time, and this proposed program will follow in that model. Because of its highly specialized niche in the education universe, the program will target websites, conferences, blogs, and other social media that focus on this special interest group.

Current courses focusing on educational games and simulations have enjoyed strong enrollments for years and consistently students ask for additional courses during advising. Therefore, there exists history of consumer interest.

c. **Economic Need**: Describe how the proposed program will act to stimulate the state economy by advancing the field, providing research results, etc.
N/A

d. **Societal Need**: Describe additional societal benefits and cultural benefits of the program.

Educational games are entertaining and challenging pathways into classroom content, so engaging the imagination and activity of both successful and reluctant learners is a crucial benefit to society.

e. **If Associate's degree, transferability**:
N/A

3. **Similar Programs.** Identify similar programs offered within Idaho and in the region by other in-state or bordering state colleges/universities.

We're aware of several competitive programs in the East and Midwest—Drexel in Philadelphia, Michigan State, Southern New Hampshire, St. Maries of Texas, and Texas A&M. Most western states have programs devoted to commercial game development, but none of which we are aware focuses on games and simulations for education.

Similar Programs offered by Idaho public institutions (list the proposed program as well)		
Institution Name	**Degree name and Level**	**Program Name and brief description if warranted**

Similar Programs offered by other Idaho institutions and by institutions in nearby states		
Institution Name	**Degree name and Level**	**Program Name and brief description if warranted**

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4. **Justification for Duplication with another institution listed above.** (if applicable). If the proposed program is similar to another program offered by an Idaho public institution, provide a rationale as to why any resulting duplication is a net benefit to the state and its citizens. Describe why it is not feasible for existing programs at other institutions to fulfill the need for the proposed program.

There are no <u>similar</u> online certificate programs in the state of Idaho or in adjacent states because all existing instruction on game development (of which we are aware) focuses on commercial game design, not on games for teaching and learning.

5. **Describe how this request supports the institution's vision and/or strategic plan.**

The highlighted portions of Boise State University's mission statement are especially relevant to the proposed program:

Boise State University is a public, metropolitan research university providing leadership in academics, *research, and civic engagement. The university offers an array of undergraduate degrees and experiences that foster student success, lifelong learning, community engagement,* ***innovation, and creativity****. Research, creative activity and* ***graduate programs****, including select doctoral degrees,* ***advance new knowledge and benefit the community, the state and the nation****.* ***The university is an integral part of its metropolitan environment and is engaged in its economic vitality,*** *policy issues, professional and continuing education programming, and cultural enrichment.*

6. **Assurance of Quality.** Describe how the institution will ensure the quality of the program. Describe the institutional process of program review. Where appropriate, describe applicable specialized accreditation and explain why you do or do not plan to seek accreditation.

The following measures will ensure the high quality of the proposed program:

<u>Regional Institutional Accreditation</u>: 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).

<u>Program Review</u>: 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. The review process is being considerably strengthened as a result of Program Prioritization with the inclusion of new metrics and a pre-review by the Provost's Office.

Graduate College: The program will adhere to all policies and procedures of the Graduate College, which is a member of the Council of Graduate Schools (Washington, D.C.), the leading authority on graduate education in the United States. The Graduate College has broad institutional oversight of all graduate degree and certificate programs.

Specialized Accreditation: All programs in the Department of Educational Technology are professionally accredited by the National Council for the Accreditation of Teacher Education (NCATE), which recently merged with another teacher-education accrediting agency to become the Council for the Accreditation of Educator Preparation (CAEP). There is no accreditation specifically for educational technology.

The Department of Educational Technology will use the following mechanisms to ensure quality:

- During the admissions process, the university will confirm required official transcripts and other documentation required for admission into the program.
- At the beginning of each course, the instructor will communicate expectations regarding academic integrity to students in the syllabus.
- Associated with access to and use of our Learning Management System (LMS), a secure log-in environment will be provided and students will be required to use strong student passwords and to change them at periods coinciding with University OIT requests. The LMS is monitored and supported through a dedicated department systems administrator.
- During the design of the curriculum and assessment of each course, instructors will apply principles from the Quality Instruction Program offered by Boise State's eCampus Center, which includes Quality Matters best practices and WCET's Best Practice Strategies to Promote Academic Integrity in Online Education (Version 2.0, June 2009).
- Faculty members are informed of and aware of the importance of academic integrity and to report and act upon suspected violations.

Program Evaluation: In addition, it is our intent to systematically evaluate the program using the following information:

- Admission benchmarks, such as graduate GPA and graduate-level communications skills demonstrated in the admission essay.
- At acceptance, students will sign a contract in which they agree to provide quality benchmarks to the department for several years after completion. These post-program benchmarks may include measures on student improvement, teacher promotion, articles published, etc. This data will be used to measure program effectiveness for accreditation purposes.
- While in the program, every course requires a faculty-evaluated project that authentically measures development of student skills.
- Conduct alumni surveys.

7. **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 B**.

   NA

8. **Teacher Education/Certification Programs** All Educator Preparation programs require review from the

Professional Standards Commission (PSC) and approval from the Board. In addition to the proposal form, the Program Approval Matrix (**Appendix C**) is required for any new and modifications to teacher education/certification programs, including endorsements. The matrix must be submitted with the proposal to OSBE and SDE using the online academic program system as one document.

This program will not lead to teacher certification; therefore this section is Not Applicable.

9. Five-Year Plan: Is the proposed program on your institution's approved 5-year plan? Indicate below.

Yes __X__ No __x__

The program was not listed during the 2015 cycle but is on the 2016 plan.

Proposed programs submitted to OSBE that are not on the five-year plan must respond to the following questions and meet at least one criterion listed below.

a. **Describe why the proposed program is not on the institution's five year plan.** When did consideration of and planning for the new program begin?

The idea began as a result of the Program Prioritization process, which emphasized that we need new courses and programs to maintain our competitive and innovative edge. More specifically, we want to respond to the demand of the popularity of our current games and simulations courses by giving students what they want and need to be successful in the workplace.

b. **Describe the immediacy of need for the program**. What would be lost were the institution to delay the proposal for implementation of the new program until it fits within the five-year planning cycle? What would be gained by an early consideration?

Nothing would be gained by delay of implementation. Benefits that would result are the following:

- The department would be able to recruit more students to its master's program.
- More secondary-education teachers throughout Idaho and the nation would become more highly qualified with the modern skill set provided by the proposed program.
- We've taught the certificate program's basic courses for years and our games-and-sims students are asking for more.
- The department's mission statement focuses on innovation, which, by definition, is change. Boise State's Department of Educational Technology was once called "the most innovative ed-tech program in America," but we cannot remain innovative or competitive without change. There are no benefits to delaying approval.

Criteria. As appropriate, discuss the following:

i. How important is the program in meeting your institution's regional or statewide program responsibilities? Describe whether the proposed program is in response to a specific industry need or workforce opportunity.

Faculty members who teach existing courses in educational games and simulations say that students are asking for more courses and more in-depth courses.

ii. Explain if the proposed program is reliant on external funding (grants, donations) with a deadline for acceptance of funding.

As a self-support program, the program is externally funded by students who pay tuition.

iii. Is there a contractual obligation or partnership opportunity to justify the program?

No. There is no contractual obligation or partnership opportunity.

iv. Is the program request or program change in response to accreditation requirements or recommendations?

No.

v. Is the program request or program change in response to recent changes to teacher certification/endorsement requirements?

No.

Curriculum, Intended Learning Outcomes, and Assessment Plan

10. Curriculum for the proposed program and its delivery.

a. Summary of requirements. Provide a summary of program requirements using the following table.

Credit hours in required courses offered by the department (s) offering the program.	15
Credit hours in required courses offered by other departments:	0
Credit hours in institutional general education curriculum	0
Credit hours in free electives	0
Total credit hours required for degree program:	15

b. Additional requirements. Describe additional requirements such as comprehensive examination, senior thesis or other capstone experience, practicum, or internship, some of which may carry credit hours included in the list above.

Each course requires a project to prove mastery, so no capstone experience will be required.

11. Program Intended Learning Outcomes and Connection to Curriculum.

a. Intended Learning Outcomes. List the Intended Learning Outcomes for the proposed program, using learner-centered statements that indicate what will students know, be able to do, and value or appreciate as a result of completing the program.

General learning objectives for the graduate certificate include:

- Analyze recent research and best practices for effective teaching and learning with educational games and with simulations in virtual worlds.
- Design, teach, and evaluate teaching and learning activities in virtual worlds.
- Identify entertaining elements in games, cartoons, and other venues, and synthesize them into educational games and activities to improve student engagement in
- Design 2-D and 3-D games for learning and test them for educational effectiveness.
- Write code to make games interact with players.

12. Assessment plans

a. **Assessment Process.** Describe the assessment process that will be used to evaluate how well students are achieving the intended learning outcomes of the program.

Students' progress and outcomes will be assessed based on objectives and procedures of each course. Examples include authentic artifacts, assignments, and personally relevant projects. Evaluations from each course will be used to judge students' success in the program.

b. **Closing the loop.** How will you ensure that the assessment findings will be used to improve the program?

After each semester of teaching, online evaluations from students and instructors' self-evaluations will be used to improve the program. Key artifacts and culminating projects will be evaluated for value and relevance against course and program goals.

c. **Measures used.** What direct and indirect measures will be used to assess student learning?

Assignments, students' selected projects, and authentic artifacts will serve as direct measures in the course. Reflections and peer feedback may also serve as indirect measures of assessment.

d. **Timing and frequency**. When will assessment activities occur and at what frequency?

Depending on the course, weekly assignment and activities, key module projects, mid-term, and final projects will be used as assessment activities. Overall program assessment will be performed each semester.

Enrollments and Graduates

13. Existing similar programs at Idaho Public Institutions. Using the chart below, provide enrollments and numbers of graduates for similar existing programs at your institution and other Idaho public institutions.

Existing Similar Programs: Historical enrollments and graduate numbers								
Institution and Program Name	**Fall Headcount Enrollment in Program**				**Number of Graduates From Program (Summer, Fall, Spring)**			
	FY__	FY__	FY__	FY__ (most recent)	FY__	FY__	FY__	FY__ (most recent)
BSU	NA							
ISU	NA							
UI	NA							
LCSC	NA							

14. **Projections for proposed program:** Using the chart below, provide projected enrollments and number of graduates for the proposed program:

Proposed Program: Projected Enrollments and Graduates First Five Years											
Program Name: Graduate Certificate in Educational Gaming and Simulation											
Projected Fall Term Headcount Enrollment in Program						**Projected Annual Number of Graduates From Program**					
FY_16_ (first year)	FY_17	FY_18	FY_19	FY_20	FY_21	FY_16 (first year)	FY_17	FY 18	FY 19	FY 20	FY 21
1	11	12	13	14	15	0	0	2	5	7	9

15. **Describe the methodology for determining enrollment and graduation projections.** Refer to information provided in Question #2 "Need" above. What is the capacity for the program? Describe your recruitment efforts? How did you determine the projected numbers above?

Existing games and simulations courses support high enrollments:

- EDTECH 531—Teaching and Learning in Virtual Worlds averages 15 students per section,
- EDTECH 532—Educational Games and Simulations averages 18 students per section,
- EDTECH 535—Digital Engagement for Learning averages 21 students per section,
- EDTECH 536—Digital Game Design averages 14 students per section.

It will serve well those pioneering educators who hope to become experts in this instructional niche.

If we market the proposed certificate to special interest groups comprised of gamer-educators, we'll find some new prospective students. Our interests (and that of our students) are best served when one of our specializations attracts students who choose to complete the master's program in addition to the courses of particular interest.

Regardless of enrollments, specializations enhance the department and the university's reputation because prospective students are impressed by the depth and breadth of curriculum, even if they are not interested in some individual specializations. As a case in point, consider the university's promotion of the raptor biology program, even though that specialization appeals to relatively few students.

16. Minimum Enrollments and Graduates. Have you determined minimums that the program will need to meet in order to be continued? What are those minimums, what is the logical basis for those minimums, what is the time frame, and what is the action that would result?

There is no minimum number for viability. Students will be enrolled in already-existing courses that will be offered whether or not the program exists.

If at a point in time in the future the program fails to maintain a reasonable number of graduates per year (e.g., >5), it will be discontinued or modified to make it more attractive to students.

<u>Resources Required for Implementation – fiscal impact and budget</u>

17. Physical Resources.

a. **Existing resources**. Describe equipment, space, laboratory instruments, computer(s), or other physical equipment presently available to support the successful implementation of the program.

The program will make use of existing resources, which are sufficient.

b. **Impact of new program**. What will be the impact on existing programs of increased use of physical resources by the proposed program? How will the increased use be accommodated?

The new program will not impact existing programs, except perhaps to cause an increase in enrollments in the Master of Educational Technology program.

c. **Needed resources.** List equipment, space, laboratory instruments, etc., that must be obtained to support the proposed program. Enter the costs of those physical resources into the budget sheet.

The program will make use of existing resources, which are sufficient.

18. Library resources

a. **Existing resources and impact of new program**. Evaluate library resources, including personnel and space. Are they adequate for the operation of the present program? Will there be an impact on existing programs of increased library usage caused by the proposed program? For off-campus programs, clearly indicate how the library resources are to be provided.

The program will make use of existing resources, which are sufficient.

b. Needed resources. What new library resources will be required to ensure successful implementation of the program? Enter the costs of those library resources into the budget sheet.

The program will make use of existing resources, which are sufficient.

19. Personnel resources

a. Needed resources. Give an overview of the personnel resources that will be needed to implement the program. How many additional sections of existing courses will be needed? Referring to the list of new courses to be created, what instructional capacity will be needed to offer the necessary number of sections?

The program will require the development and offering of the following three new courses:

- EDTECH 563 QUEST-BASED LEARNING DESIGN (3-0-3)(F). Emphasizes the knowledge, skills, and pedagogy of quest based learning as applied to emerging gaming techniques and technologies. PREREQ: ADM/PROG.
- EDTECH 564 GAMIFIED AUGMENTED REALITY AND MOBILE GAME DESIGN (3-0-3)(S). Analysis of emerging technologies that combine virtual and augmented realities, with specific support for mobile applications. PREREQ: ADM/PROG.
- EDTECH 565 ADVANCED EDUCATIONAL GAME DESIGN (3-0-3)(F/S) Examines advanced digital games design for K-12 implementations. PREREQ: EDTECH 536.

b. Existing resources. Describe the existing instructional, support, and administrative resources that can be brought to bear to support the successful implementation of the program.

The department of Educational Technology has an extensive infrastructure that supports its master's, Ed.S., Ed.D., and graduate certificate programs. It will easily be able to accommodate any additional work caused by the creation of the new graduate certificate.

c. Impact on existing programs. What will be the impact on existing programs of increased use of existing personnel resources by the proposed program? How will quality and productivity of existing programs be maintained?

It is anticipated that there will be no impact on existing programs. If additional person-power is necessary, it will be a simple matter to scale-up, using the self-support program's resources.

d. Needed resources. List the new personnel that must be hired to support the proposed program. Enter the costs of those personnel resources into the budget sheet.

It is anticipated that there will be no impact on existing programs. If additional person-power is necessary, it will be a simple matter to scale-up, using the self-support program's resources.

20. Revenue Sources

a) **Reallocation of funds:** If funding is to come from the reallocation of existing state appropriated funds, please indicate the sources of the reallocation. What impact will the reallocation of funds in support of the program have on other programs?

N/A

b) **New appropriation**. If an above Maintenance of Current Operations (MCO) appropriation is required to fund the program, indicate when the institution plans to include the program in the legislative budget request.

N/A

c) **Non-ongoing sources**:

i. If the funding is to come from one-time sources such as a donation, indicate the sources of other funding. What are the institution's plans for sustaining the program when that funding ends?

ii. Describe the federal grant, other grant(s), special fee arrangements, or contract(s) that will be valid to fund the program. What does the institution propose to do with the program upon termination of those funds?

N/A

d) **Student Fees**:

i. If the proposed program is intended to levy any institutional local fees, explain how doing so meets the requirements of Board Policy V.R., 3.b.

ii. Provide estimated cost to students and total revenue for self-support programs and for professional fees and other fees anticipated to be requested under Board Policy V.R., if applicable.

Students in the proposed program will be in many of the same classes as students in the existing programs offered by the department. Similarly, students in the existing programs will enroll in the three new classes that are being created for the proposed program. As a simple way to depict the revenue to and cost of the proposed program, the budget depicts the cost of offering those three courses and the revenue that will result from those three courses.

The cost to a student of completing the proposed certificate program can be calculated as 15 credits times $379.33 per credit (the cost to students for master's level courses) for a total of $5,689.95.

21. Using the budget template provided by the Office of the State Board of Education, provide the following information:

- Indicate all resources needed, including the planned FTE enrollment, projected revenues, and estimated expenditures for the first **four** fiscal years of the program.
- Include reallocation of existing personnel and resources and anticipated or requested new resources.
- Second and third year estimates should be in constant dollars.
- Amounts should reconcile subsequent pages where budget explanations are provided.
- If the program is contract related, explain the fiscal sources and the year-to-year commitment from the contracting agency(ies) or party(ies).
- Provide an explanation of the fiscal impact of any proposed discontinuance to include impacts to faculty (i.e., salary savings, re-assignments).

I. PLANNED STUDENT ENROLLMENT

	FY 17		FY 18		FY 19		FY 20	
	FTE	Headcount	FTE	Headcount	FTE	Headcount	FTE	Headcount
A. New enrollments	5.6	11	6	12	6.375	13	6.75	14
B. Shifting enrollments	0	0	0	0	0	0	0	0
Total Enrollment	5.6	11	6.0	12	6.4	13	6.8	14

Budget Notes:
I.A,B. FTE calculated as 24 credits per year per FTE
Assume 10% of enrollments are new
Headcount calculated as 2xFTE because these will be part-time students

II. REVENUE

	FY 17		FY 18		FY 19		FY 20	
	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time
1. New Appropriated Funding Request								
2. Institution Funds								
3. Federal								
4. New Tuition Revenues from Increased Enrollments								
5. Student Fees		$51,209.55		$54,623.52		$58,037.49		$61,451.46
6. Other (i.e., Gifts)								
Total Revenue	$0	$51,210	$0	$54,624	$0	$58,037	$0	$61,451

Budget Notes:
II.5. Self support revenue is derived from student fees and is considered one-time funding
$379.33 per credit

III. EXPENDITURES

	FY 17		FY 18		FY 19		FY 20	
	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time
A. Personnel Costs								
1. FTE		N/A		N/A		N/A		N/A
2. Faculty		$31,000		$31,000		$31,000		$31,000
3. Adjunct Faculty								
4. Graduate/Undergrad Assistants								
5. Research Personnel								
6. Directors/Administrators								
7. Administrative Support Personnel								
8. Fringe Benefits		$11,733		$12,720		$13,430		$13,834
9. Other:								
Total Personnel and Costs	$0	$42,733	$0	$43,720	$0	$44,430	$0	$44,834

Budget Notes

III.A.2. Faculty costs estimated as the portion of instructional costs assignable to the graduate certificate programs as opposed to other Educational Technology programs that are sharing the same classrooms.

	FY 17		FY 18		FY 19		FY 20	
	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time
B. Operating Expenditures								
1. Travel								
2. Professional Services								
3. Other Services								
4. Communications								
5. Materials and Supplies								
6. Rentals								
7. Materials & Goods for Manufacture & Resale								
8. Miscellaneous								
Total Operating Expenditures	$0	$0	$0	$0	$0	$0	$0	$0

	FY 17		FY 18		FY 19		FY 20	
	On-going	One-time	On-going	One-time	On-going	One-time	On-going	One-time
C. Capital Outlay								
1. Library Resources								
2. Equipment								
Total Capital Outlay	$0	$0	$0	$0	$0	$0	$0	$0
D. Capital Facilities Construction or Major Renovation								
E. Indirect Costs (overhead)								
Utilites								
Maintenance & Repairs								
Other								
Admin Svc Chrg 10% of expenditures]		$4,273.29		$4,372.00		$4,443.04		$4,483.38
Other								
Uncollected and Credit card chrgs 1% revenue		$512.10		$546.24		$580.37		$614.51
Total Indirect Costs	$0	$4,785	$0	$4,918	$0	$5,023	$0	$5,098
TOTAL EXPENDITURES:	$0	$42,733	$0	$43,720	$0	$44,430	$0	$44,834
Net Income (Deficit)	$0	$8,477	$0	$10,904	$0	$13,607	$0	$16,618

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IDAHO EPSCOR

SUBJECT

Experimental Program to Stimulate Competitive Research (EPSCoR) Annual Report

REFERENCE

August 2013	EPSCoR provided their annual report to the Board
April 2014	EPSCoR provided their annual report to the Board
April 2015	EPSCoR provided their annual report to the Board

APPLICABLE STATUTE, RULE, OR POLICY

Idaho State Board of Education Governing Policies & Procedures, Section III.W. Higher Education Research

BACKGROUND/DISCUSSION

The Experimental Program to Stimulate Competitive Research (EPSCoR) is a federal-state partnership designed to enhance the science and engineering research, education, and technology capabilities of states that traditionally have received smaller amounts of federal research and development funds. Through EPSCoR, participating states are building a high-quality, academic research base that is serving as a backbone of a scientific and technological enterprise.

Idaho EPSCoR is led by a state committee composed of 16 members appointed by the Board, with diverse professional backgrounds from both the public and private sectors and from all regions in the state. The Idaho EPSCoR committee oversees the implementation of the EPSCoR program and ensures program goals and objectives are met. The Idaho EPSCoR office and the Idaho EPSCoR Project Director are located at the University of Idaho. Partner institutions are Boise State University and Idaho State University including participation of Idaho's 2-year and 4-year colleges.

The purpose of EPSCoR awards is to provide support for lasting improvements in a state's academic research infrastructure and its research and education capacity in areas that support state and university Science and Technology Strategic Plans. Idaho EPSCoR activities include involvement in K-12 teacher preparation and research initiatives and projects ranging from undergraduate research through major state and regional research projects.

Idaho has three active NSF EPSCoR Research Infrastructure Improvement (RII) awards:

- Track-1 RII; 2013-2018 - $20 million, “Managing Idaho’s Landscapes for Ecosystem Services (MILES)”

- Track-2 RII Focused EPSCoR Collaborations; 2013-2017 - $6 million, “Western Consortium for Watershed Analysis and Visualization (WC-WAVE)”

- Track-3 RII Building Diverse Communities; 2014-2019 - $750,000 (up to five years), “Indigenous Program for STEM Research”, and “Regional Native Network of Graduate Education: A National Research and Educational Model”

Consistent with Board Policy III.W.2. d., EPSCoR has prepared an annual report regarding current EPSCoR activities that details all projects by federal agency source, including reports of project progress from associated external Project Advisory Board (PAB).

ATTACHMENTS

Attachment 1 – Annual Report Presentation Page 3

STAFF COMMENTS AND RECOMMENDATIONS

Idaho EPSCoR was awarded a new Track-1 grant NSF-EPSCoR award in 2013 entitled, “Managing Idaho’s Landscapes for Ecosystem Services”, for $20M between the 2013-2018 periods. NSF-EPSCoR grants require a state matching component, these funds are paid out of a portion of the funds allocated for use by the Board’s Higher Education Research Council (HERC). The state match for the current award is $800,000 for fiscal year 2017.

BOARD ACTION

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

Idaho NSF EPSCoR Research Infrastructure Improvement (RII): *Annual Report - 2016*

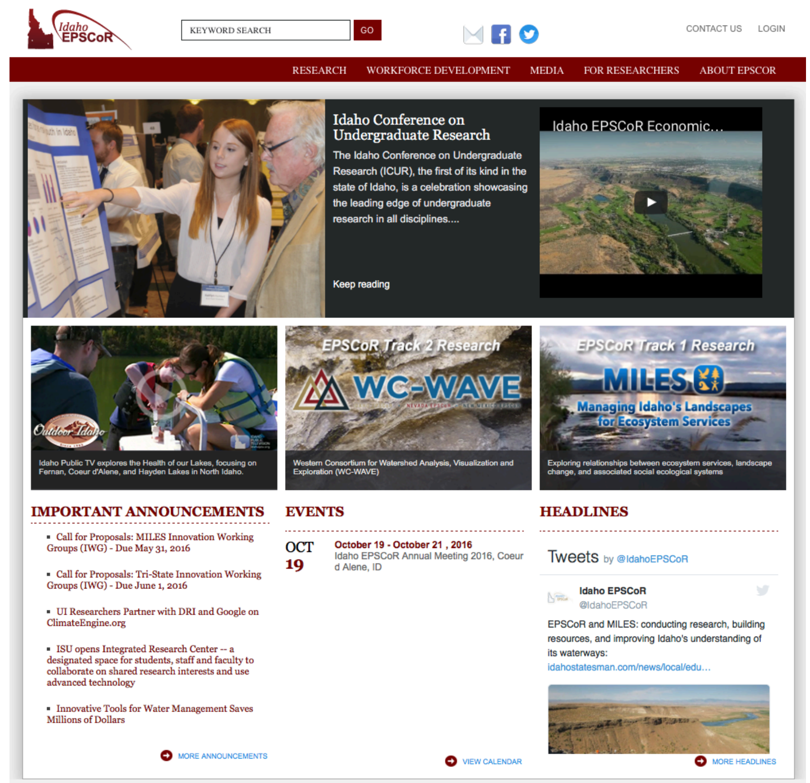
Peter Goodwin, Project Director
Laird Noh, EPSCoR Committee Chair

Idaho State Board of Education
Pocatello, Idaho
August 11, 2016

Experimental Program to Stimulate Competitive Research

2016 Annual Report

www.idahoepscor.org



- ✓ A National Context
- ✓ Active EPSCoR RII Awards
- ✓ Accomplishments
- ✓ 2017 NSF EPSCoR RII Track-1
- ✓ Concluding Remarks

BOISE STATE UNIVERSITY

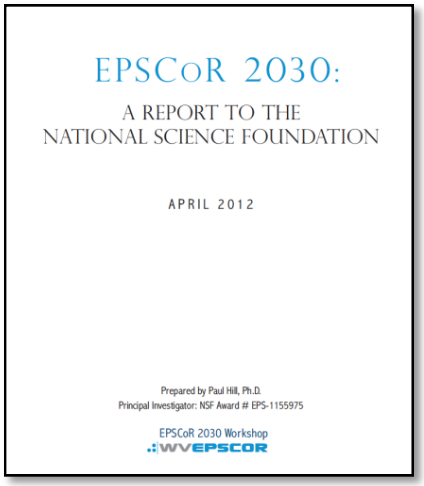
University of Idaho

Idaho State UNIVERSITY

IDAHO EPSCoR

Experimental Program to Stimulate Competitive Research

"ONEIdaho" EPSCoR Philosophy



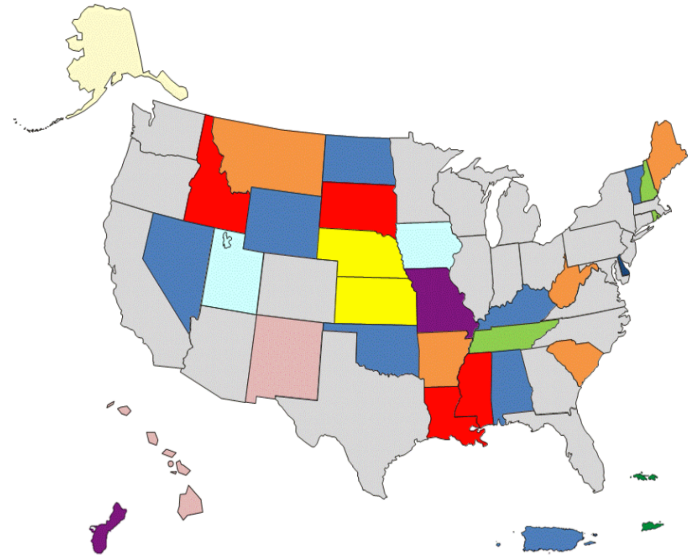
EPSCoR 2030:

A REPORT TO THE
NATIONAL SCIENCE FOUNDATION

APRIL 2012

Prepared by Paul Hill, Ph.D.
Principal Investigator: NSF Award # EPS-1155975

EPSCoR 2030 Workshop
WVEPSCOR



ONE Idaho

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IDAHO EPSCoR

Experimental Program to Stimulate Competitive Research

Idaho EPSCoR Committee

2016

Idaho's Research Competitiveness

Total NSF funding to Idaho (FY15)

= **$26.2M** up 77%

from 2008

0.34% of NSF's Total Research funding to Idaho (FY13-15), up from 0.26% five years ago

"The EPSCoR program has contributed meaningfully to Jurisdictions' increased competitiveness for NSF funds." -STPI, 2014

NSF Research funding to EPSCoR Jurisdictions (FY13-15)

STATE	% of Total $
Grand Total	100.00%
Other	0.41%
US Total	99.59%
Guam	0.01%
Virgin Islands	0.06%
Puerto Rico	0.11%
North Dakota	0.18%
Vermont	0.19%
South Dakota	0.23%
West Virginia	0.23%
Mississippi	0.25%
Wyoming	0.25%
Arkansas	0.27%
Nevada	0.32%
Idaho	0.34%
Montana	0.34%
Maine	0.38%
Kentucky	0.38%
Alabama	0.45%
Nebraska	0.48%
Kansas	0.52%
Alaska*	0.52%
Delaware*	0.53%
Louisiana*	0.54%
Oklahoma	0.54%
Hawaii*	0.55%
New Hampshire*	0.59%
South Carolina*	0.60%
New Mexico	0.66%
Rhode Island*	0.75%

Active NSF EPSCoR RII Projects

✓ Track 1: Academic Research Capacity

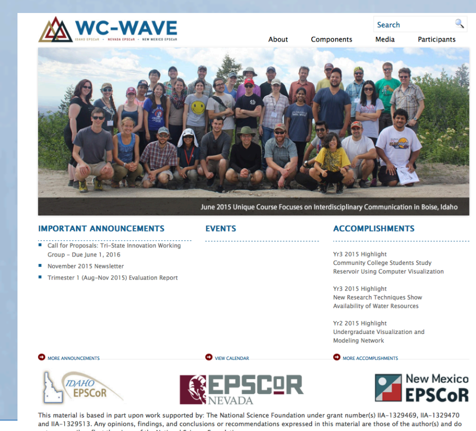
- ***Managing Idaho's Landscapes for Ecosystem Services (MILES); (2013–2018) $20M plus required 20% match***

✓ Track 2: Regional Collaboration

- ***Western Consortium for Watershed Analysis, Visualization, and Exploration (WC-WAVE); (2013-2016) $6M ($2M to Idaho)***

✓ Track 3: STEM Education

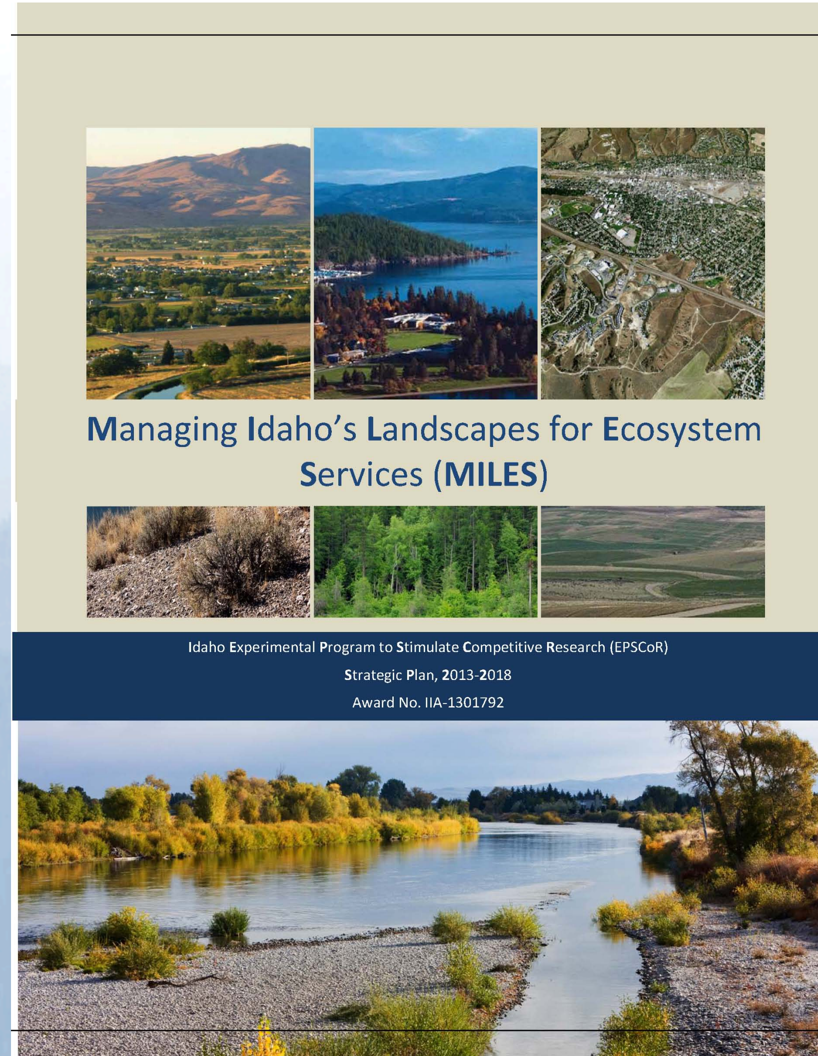
- ***Indigenous Program for STEM Research and a Regional Native Network of Graduate Education: A National Research and Educational Model; (2014-2019) $750k***



Experimental Program to Stimulate Competitive Research

NSF EPSCoR RII - MILES

- ✓ 11 New Faculty Positions
- ✓ MURI – Undergraduate Research
- ✓ Cyberinfrastructure
- ✓ Statewide Coupled Natural-Human Systems Research
- ✓ Modeling and Visualization
- ✓ Diversity contributions to State STEM Roadmap
- ✓ Stakeholder Engagement

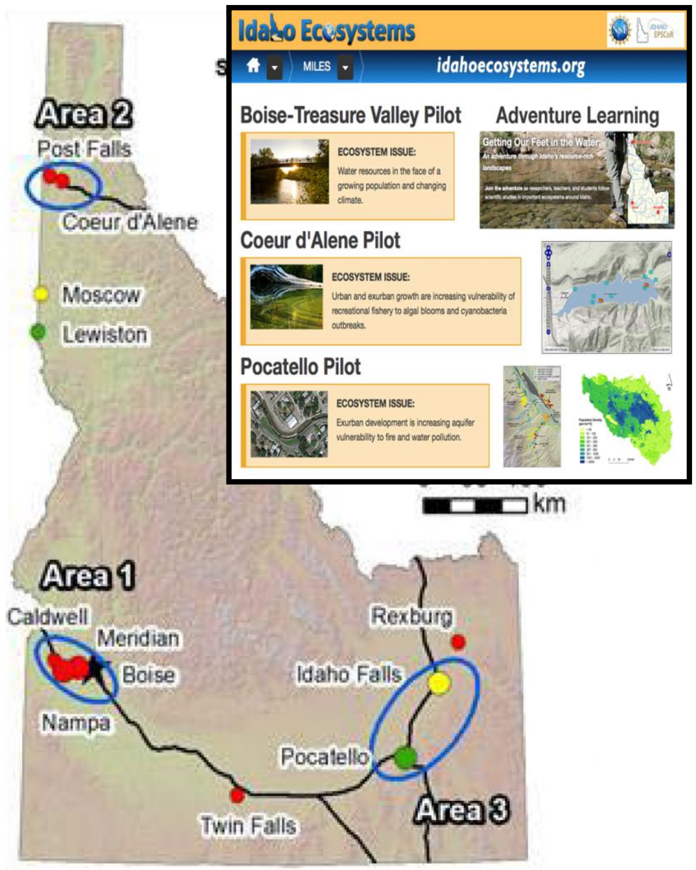


Managing Idaho's Landscapes for Ecosystem Services (**MILES**)

Idaho Experimental Program to Stimulate Competitive Research (EPSCoR)
Strategic Plan, 2013-2018
Award No. IIA-1301792

NSF EPSCoR RII - MILES

Infrastructure Improvement Strategy



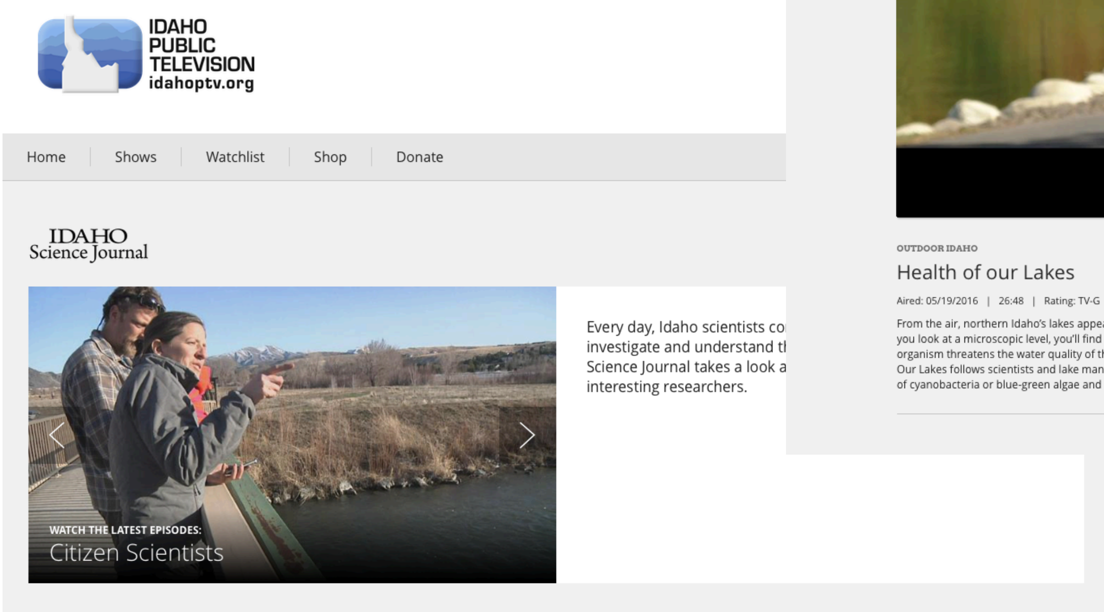
- Place-based studies provide integrative research laboratories
- Statewide collaboration
- Stakeholders as partners
- New faculty positions
- Integrated research and education

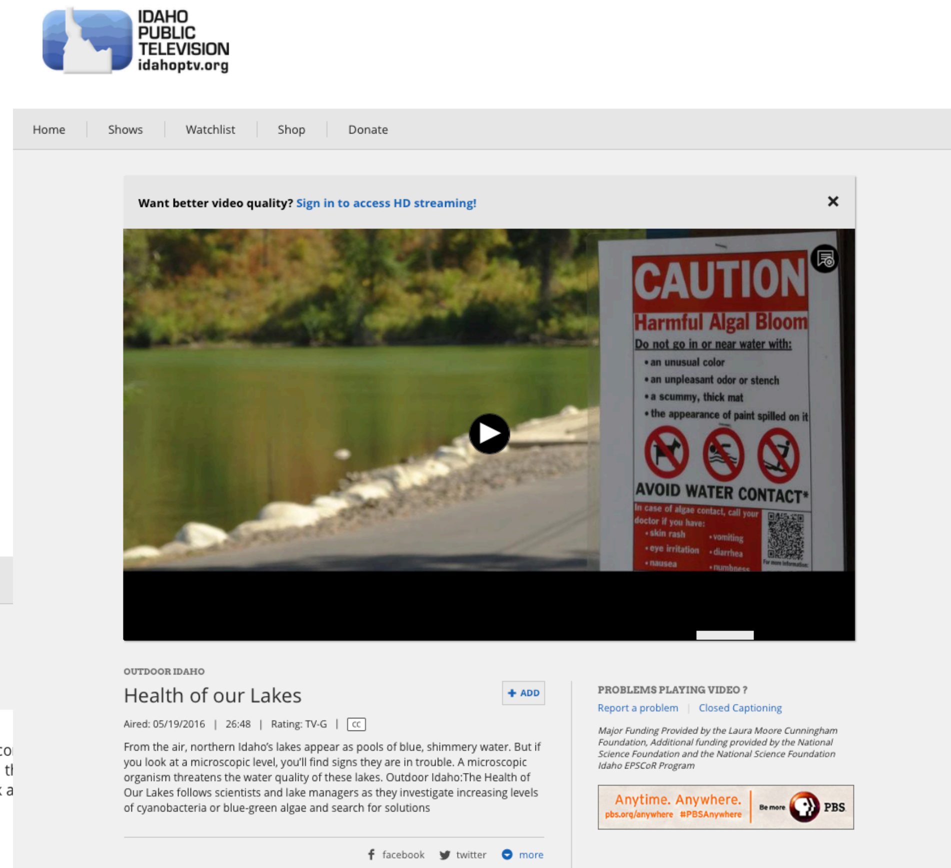
www.idahoecosystems.org

MILES External Engagement

Idaho Public Television

- ✓ Idaho Science Journal
- ✓ Outdoor Idaho





Recent NSF EPSCoR MILES Outputs

- **49** journal publications with partial or primary EPSCoR support to-date
- **275+** participants statewide in Yr-3 (44% female, 10% underrepresented)
- Research opportunities for **80** undergraduates in Yr-3 (54% female, 35% underrepresented)
- Submitted **161** proposals since 2013 requesting $119.5M
- Received 53 grants totaling **$20.2M** to-date
- Involved > **6,800** stakeholders and community members in Yr-3
- **18** graduate degrees granted to MILES students to-date

Workforce Development and Diversity

MILES - Adventure Learning

- 95 K-12 Teachers trained in 2015
- Reaching 11,200 students

Engaging Idaho's full intellectual capacity

- MURI – 35% underrepresented students
- Idaho Diversity Network active

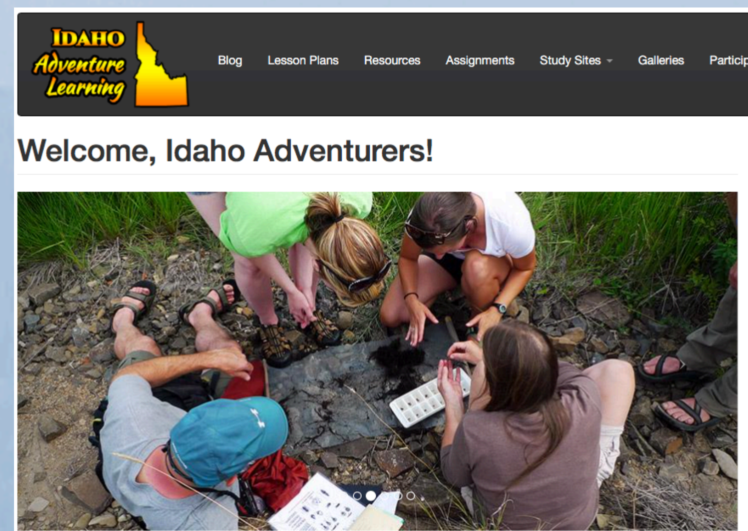
2016 Workshops

Pocatello, June 6-10 (flyer)
contact: Rosemary Smith
208-282-4918

Cd'A, June 20-24 (flyer)
contact: Brant Miller
208-885-4077

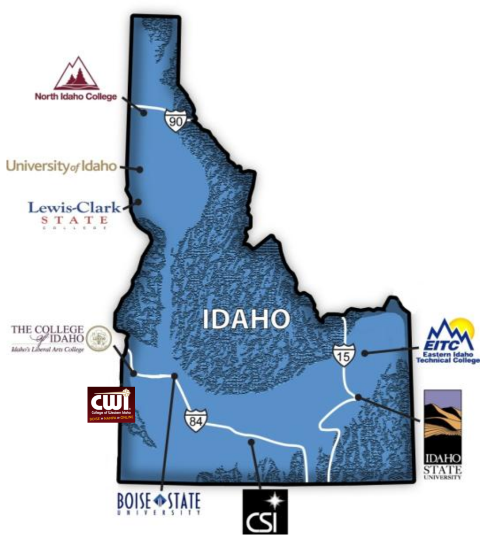
Boise, July 11-15 (flyer)
contact: Cindy Busche
208-608-7244

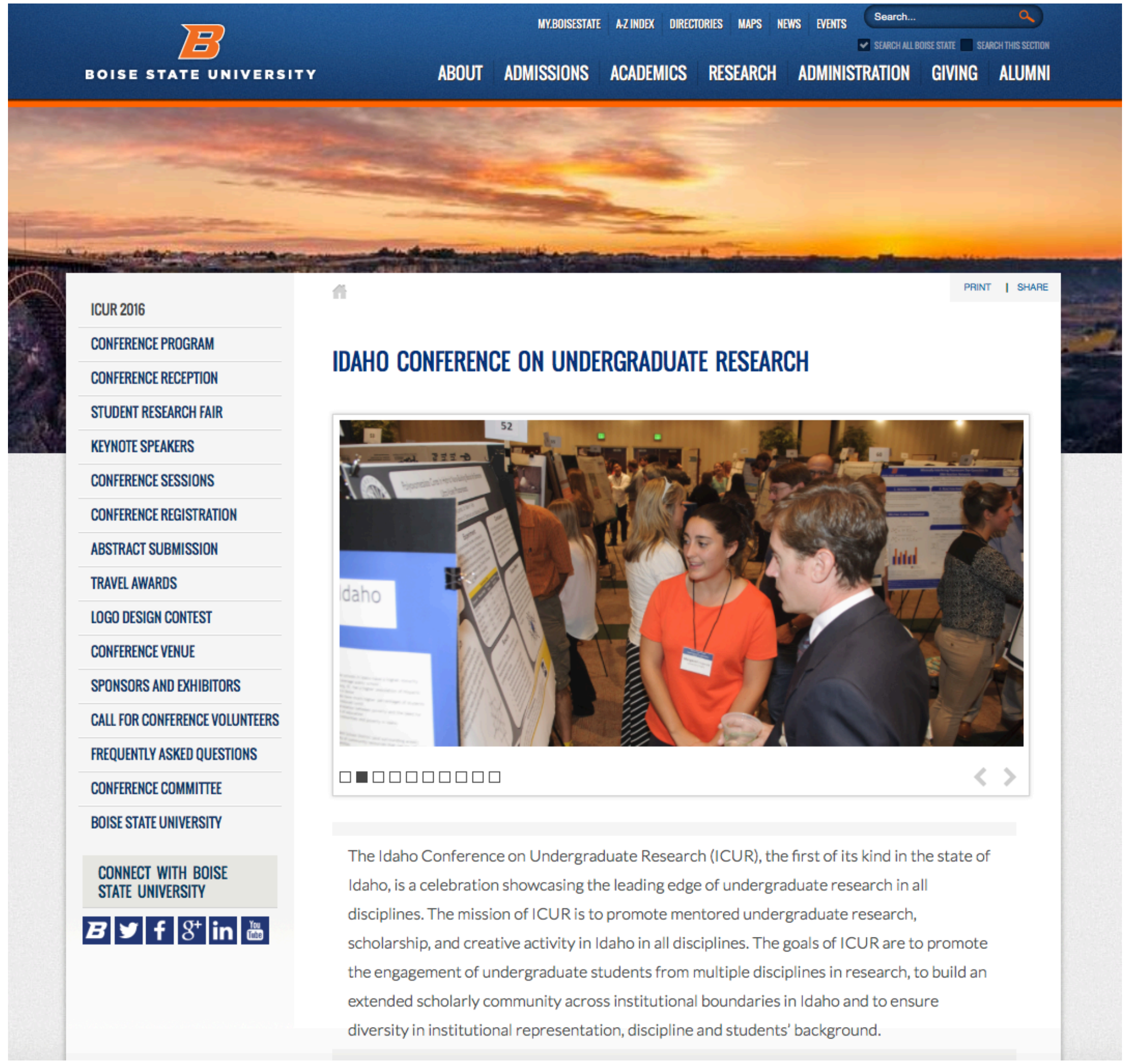
AL Team at Fernan Lake



NSF EPSCoR RII - MILES

Collaboration: Idaho Conference on Undergraduate Research





IDAHO EPSCoR

Experimental Program to Stimulate Competitive Research

EPSCoR Track 2 RII

Western Consortium of Idaho, Nevada, and New Mexico

- ✓ Watershed Science
- ✓ Visualization and Data
- ✓ Workforce Development and Education

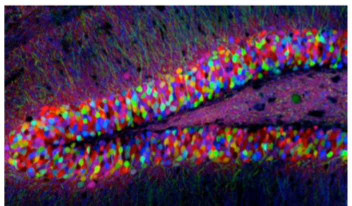
Western Consortium for Watershed Analysis, Visualization, and Exploration (WC-WAVE)

2017 Idaho NSF EPSCoR

NSF Addressing National Priorities

Food/Energy/Water

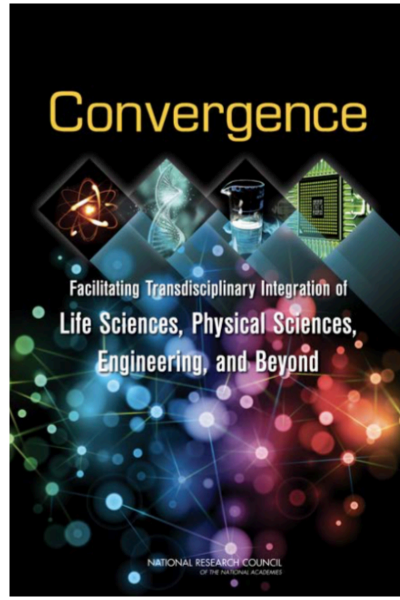
Risk and Resilience



Understanding the Brain

INCLUDES

ONE Idaho
Innovation • Integration • Inspiration



NSF Ideas for Future Investment

RESEARCH IDEAS

- Harnessing Data for 21st Century Science and Engineering
- Shaping the New Human – Technology Frontier
- Understanding the Rules of Life – Predicting Phenotype
- The Quantum Leap – Leading the Next Quantum Revolution
- Navigating the New Arctic
- Windows on the Universe – The Era of Multi-messenger Astrophysics

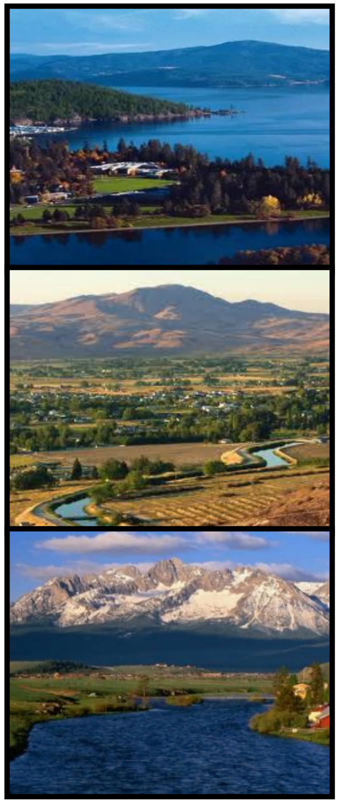
PROCESS IDEAS

- Growing Convergent Research at NSF
- Mid-scale Research Infrastructure
- NSF 2050

IDAHO EPSCoR

Experimental Program to Stimulate Competitive Research

Idaho NSF EPSCoR



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IDAHO EPSCoR

Experimental Program to Stimulate Competitive Research

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SUBJECT

Instruction, Research and Student Affairs (IRSA) Chairman, Dave Hill, update to the State Board of Education on IRSA committee work.

BACKGROUND/DISCUSSION

Board Member Hill will provide a brief update on the committee and activities it is currently discussing. The update will include:

1. Dual Credit Workgroup
2. Math working group

BOARD ACTION

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

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TAB	DESCRIPTION	ACTION
1	**AMENDMENT TO BOARD POLICY** Section II.F. – Policies Regarding Non-classified Employees	Motion to approve
2	**IDAHO STATE UNIVERSITY** Reclassification of Provost to Executive Vice President and Provost	Motion to approve

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SUBJECT

Idaho State Board of Education Policy II.F. – first reading

REFERENCE

June 2016	Board approved the second reading of amendment to Board policy II.F (related to coach and athletic director employment agreements)

APPLICABLE STATUTE, RULE, OR POLICY

Idaho State Board of Education Governing Policies & Procedures, Section II.F.
Section 49-2426, Idaho Code

BACKGROUND/DISCUSSION

The proposed amendment is the result of extended discussions among the State Board of Education (Board) Athletics Committee, the Board's Deputy Attorney General and institutional legal counsel, and the State Risk Management office. Language has been added to the policy to emphasize state regulations with respect to state-owned or leased vehicles and the insurance requirements applicable when local dealerships provide courtesy vehicles to institution personnel who choose to make personal use of those vehicles.

IMPACT

The proposed amendment fills a gap in previous Board policy with respect to courtesy vehicles. The revised wording reiterates existing State policy that personal use by employees of agency-owned/leased vehicles—as well as institution-controlled courtesy vehicles which are insured through the State's Risk management program—is not permitted. The amendment also provides the minimum coverage limits, special endorsements, and "additional insured" requirements when employees obtain personal insurance for courtesy vehicles.

ATTACHMENTS

Attachment 1: Amendment to Board Policy Section II.F. Page 3

STAFF COMMENTS AND RECOMMENDATIONS

The proposed amendment to Policy II.F.b.vi. is being forwarded in parallel with a proposed amendment (under separate cover) to Policy I.E., which will clarify employment benefits (car allowances) and insurance requirements applicable to institutional presidents. Taken together, the proposed amendments will help ensure compliance and consistency with respect to use of institution-owned vehicles, including dealer-provided courtesy vehicles for college/university employees. Staff recommends approval.

BOARD ACTION

I move to approve the first reading of the proposed amendment to Board Policy Section II.F “Policies Regarding Non-classified Employees” as provided in Attachment 1.

Moved by____________ Seconded by____________ Carried Yes____ No____

1. Employment Terms

   a. All non-classified employees, except those set forth in Section II.F.1.b. below, serve at the pleasure of the chief executive officer, and may be dismissed at any time, with or without cause, and without notice, at the discretion of the chief executive officer.

   b. Employment Contracts

      i. An institution may provide employment contracts to its non-classified employees. If an institution chooses to offer employment contracts to its non-classified employees, 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-classified employees have no continued expectation of employment beyond their current contract of employment.

      ii. Non-classified employees, who serve pursuant to contracts of employment 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).

      iii. Each 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 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.

      iv. Each contract of employment shall include a statement to the following effect and intent: "The terms of employment set forth in this 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 University of Idaho), and the policies and procedures of the institution." The 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.F.5. of Board Policy.

v. No contract of employment with such an employee may exceed one (1) year without the prior express approval of the Board, with the exception of employment agreements for athletic directors and coaches as set forth in Section II.H. of Board Policy. Employment beyond the contract period may not be legally presumed. Renewal of an employment contract is subject solely to the discretion of the chief executive officer of the institution, and, where applicable, of the Board.

2. Compensation

a. Salary – All non-classified employees shall receive a fixed salary. A payment in addition to the fixed salary for an employee on annual contract or agreement may be authorized by the chief executive officer for documented meritorious performance, to compensate a professional annual employee for short-term work assignments or additional duties beyond what is outlined in an employee's contract or agreement, or as incentive pay. Incentive pay may be paid for achievement of specific activities, goals or certifications as may be established by an institution in conjunction with certain programs or initiatives. All initial salaries for non-classified employees are established by the chief executive officer, subject to approval by the Board where applicable. The Board may make subsequent changes for any non-classified employee salary or may set annual salary guidelines and delegates 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 or paid to the non-classified 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, Salary Increases and other Compensation related items

i. Salaries for new appointments to dean, associate/assistant dean, vice president, and president/vice president direct-report positions 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.

ii. Appointments to acting or interim positions shall be at base salary rates no greater than ten percent (10%) more than the appointees' salary rate immediately prior to accepting the interim appointment or ninety-five percent (95%) of the prior incumbent's rate, whichever is greater.

iii. Overtime Compensation – Non-classified employees earning annual leave at the equivalent rate of two (2) days for each month or major fraction thereof of credited state service are not eligible for either cash compensation or compensatory time off for overtime work. Non-classified employees in positions that are defined as "non-exempt" under the Fair Labor Standards Act earn overtime at a rate of one and one-half (1½) hours for each overtime hour worked. Other non-classified employees may earn compensatory time off at the discretion of the chief executive officer at a rate not to exceed one (1) hour of compensatory time for each hour of overtime worked.

iv. Credited State Service - The basis for earning credited state service will be the actual hours paid not to exceed forty (40) per week.

v. Pay Periods - All non-classified employees are paid in accordance with a schedule established by the state controller.

vi. Automobile Exclusion and Courtesy Vehicles - ~~Unless expressly authorized by the Board,~~ With the exception of courtesy vehicles provided for use by local car dealerships, no ~~non-classified~~ employee will receive an automobile or automobile allowance as part of his or her compensation, unless expressly authorized by the Board. The use of institution-registered courtesy vehicles is subject to the following requirements:

(1) The institution will verify that all courtesy vehicle use is insured in accordance with the requirements of Idaho's Risk Management Program.

(2) Personal use is not allowed for courtesy vehicles which are controlled by the institution and insured through Risk Management.

(3) Personal and permissive use of a courtesy vehicle is excluded from coverage under the State of Idaho's Risk Management Program, unless the institution has verified that the employee has obtained insurance which meets the following requirements:

a) Employee to provide a personal automobile policy with at least $500,000 combined single limits

b) Personal automobile policy must include a non-owned automobile endorsement or clause

c) The State of Idaho and the State Agency must be named as additional insured on the employee's personal auto policy

3. Annual Leave

   a. Non-classified employees at the institutions, agencies earn annual leave at the equivalent rate of two (2) days per month or major fraction thereof of credited state service. Twelve-month employees employed at the entities named above may accrue leave up to a maximum of 240 hours. An employee who has accrued the maximum will not earn further leave until the employee's use of annual leave reduces the accrual below the maximum.

      Non-classified employees in positions which are covered under the Fair Labor Standards Act earn annual leave in accordance with and subject to the maximum leave accruals in Section 67-5334, Idaho Code.

   b. Non-classified employees appointed to less than full-time positions earn annual leave on a proportional basis dependent upon the terms and conditions of employment.

      d) Professional Leave - At the discretion of the chief executive officer, non-classified employees may be granted professional leave with or without compensation under conditions and terms as established by the chief executive officer.

      e) Pursuant to section 59-1606(3), Idaho Code, when a classified employee’s position is changed to non-classified, or when a classified employee is moved into a non-classified position, and that employee, due to the employee’s years of service, has an annual leave balance in excess of 240 hours, then the institution may pay the employee as supplemental pay the balance that is in excess of 240 hours.

4. Performance Evaluation

   Each institution or agency must establish policies and procedures for the performance evaluation of non-classified employees, and are responsible for implementing those policies in evaluating the work performance of employees. The purposes of employee evaluations are to identify areas of strength and weakness, to improve employee work performance, and to provide a basis on which the chief executive officers and the Board may make decisions concerning retention, promotion, and merit salary increases. All non-classified employees must be evaluated annually. Any written recommendations that result from a performance evaluation must be signed by the appropriate supervisor, a copy provided to the employee and a copy placed in the official personnel file of the employee. Evaluation ratings that result in findings of inadequate performance of duties or failure to perform duties constitute adequate cause as set forth in Section II.L. of Board Policy.

5. Non-Renewal of Non-classified Contract Employees

   a. Notice of the decision of the chief executive officer to not renew a contract of employment must be given in writing to the non-classified employee at least sixty (60) calendar days before the end of the existing period of appointment for annual appointments. For appointments of less than one year, the written notice must be at least thirty (30) days prior to the end of the existing period of appointment. Reasons for non-renewal need not be stated. Non-renewal without cause is the legal right of the Board. If any reasons for non-renewal are provided to the employee for information, it does not convert the non-renewal to dismissal for cause and does not establish or shift any burden of proof. Failure to give timely notice of non-renewal because of mechanical, clerical, mailing, or similar error is not deemed to renew the contract of employment for another full term, but the existing term of employment must be extended to the number of days necessary to allow sixty (60) (or thirty days where applicable) calendar days' notice to the employee.

   b. Except as set forth in this paragraph, non-renewal is not grievable within the institution nor is it appealable to the Board. However, if an employee presents bona fide allegations and evidence to the chief executive officer of the institution that the non-renewal of the contract of employment was the result of discrimination prohibited by applicable law, the employee is entitled to use the internal discrimination grievance procedure set forth in Section II.M. to test the allegation. If the chief executive officer is the subject of the allegations, the employee may present the bona fide allegations and evidence to the Executive Director. The normal internal grievance procedure for discrimination must be used unless changed by mutual consent of the parties. The ultimate burden of proof rests with the employee. The institution is required to offer evidence of its reasons for non-renewal only if the employee has made a prima facie showing that the recommendation of non-renewal was made for reasons prohibited by applicable law. Unless mutually agreed to by the parties in writing, the use of the discrimination grievance procedure will not delay the effective date of non-renewal. Following the discrimination grievance procedures, if any, the decision of the institution, is final, subject to Section II.F.5.c., below.

   c. If, and only if, the chief executive officer is the subject of the alleged discrimination prohibited by applicable law, the non-classified contract employee may petition the Board to review the final action of the institution. Any petition for review must be filed at the Office of the State Board of Education within fifteen (15) calendar days after the employee receives notice of final action. The Board may agree to review the final action, setting out whatever procedure and conditions for review it deems appropriate, or it may choose not to review the final action. The fact that a review petition has been filed will not stay the effectiveness of the final action, nor will the grant of a petition for review, unless specifically provided by the Board. Board review is not a matter of right. An employee need not petition for Board review in order to have exhausted administrative remedies for purposes of judicial review. Nothing in this section should be construed as any prohibition against filing a complaint with any appropriate state or federal entity, including but not limited to the Equal Employment Opportunity Commission (EEOC) or the Idaho Human Rights Commission (IHRC).

6. Tenure

Non-classified employees are generally not entitled to tenure. Certain, very limited, exceptions to this general rule are found in Subsection G.6 of these personnel policies and procedures.

IDAHO STATE UNIVERSITY

SUBJECT

Authorization to establish new vice-president level position: Executive Vice President and Provost

APPLICABLE STATUTES, RULE OR POLICY

Idaho State Board of Education Governing Policies & Procedures, Section II.B.3.a.

BACKGROUND / DISCUSSION

Idaho State University (ISU) continues to evaluate its programs, processes, and organizational structure to enhance the student experience, increase support to the faculty, and provide superior service and administrative oversight. ISU is proposing a revised leadership structure which will support these goals while eliminating duplication of effort and enhancing unity of effort. ISU seeks State Board of Education (Board) approval to establish a new position: Executive Vice President and Provost. The new position would serve as the President's senior administrator and academic leader, providing unified oversight of administrative as well as academic functions. The new position would replace the current Provost position. Under the new model, the President would continue to directly interact with the senior leaders under the authority of the Executive Vice President and Provost through the Institutional Effectiveness Council and the President's Executive Council. The revised structure will reduce the need for day-to-day operational decision-making tasks by the President, enabling the Chief Executive to focus on the University's mission and strategic goals/objectives.

Details of the proposed new vice-president position are provided below, in accordance with Board Policy II.B.3.a.

i. Position title: Executive Vice President and Provost
ii. Type of position: Administrative, Non-Classified
iii. FTE: 1.0
iv. Term of appointment: 12 months
v. Effective date: August 14, 2016
vi. Salary: $235,000
vii. Funding source: Appropriated Funds
viii. A description of the duties and responsibilities of the position is provided in Attachment 1.

IMPACT

By combining the administrative and academic oversight of the functional areas under this new position, ISU will be able to more closely align the budget process with academic requirements and with the institution's strategic priorities. This realignment will help ISU's leadership prioritize its resources to fully support student learning outcomes. The proposed leadership structure is similar to that in place at the University of Idaho and at many other universities across the country. Subject to Board approval of the new position, ISU intends to promote the current Provost into the position, at an annual salary level of $235,000 (this represents a 10.9% increase above the current salary for the Provost position and is in line with national CUPA-HR market data).

ATTACHMENTS

STAFF COMMENTS AND RECOMMENDATIONS

The proposed executive vice president/provost model has been used successfully at other institutions, and it has the potential to enhance integrated strategic planning, programming, resource allocation, and assessment operations at ISU in support of the Board's strategic goals and objectives. Clear lines of authority and responsibility are essential to the success of any organization. Implementation of the revised leadership structure (upon Board approval of the new position) has an excellent prospect of success in light of the ISU president's plan to appoint a highly-capable, proven leader—ISU's current provost—as the Executive Vice President and Provost.

BOARD ACTION

I move to authorize Idaho State University to establish the position of Executive Vice President and Provost, with terms and duties as described in the documentation provided.

Moved by____________ Seconded by_____________ Carried Yes____ No____

Position: Executive Vice President and Provost

The Executive Vice President and Provost (EVPP) is the Chief Academic Officer of the University. The EVPP represents the President in matters where the President is absent or unavailable. The EVPP has oversight over units that directly impact instructional, academic and research programs. This would include the following administrative units: (1) outreach campuses/centers; (2) student affairs; (3) research, (4) finance and administration; (6) libraries; and (7) divisions, institutes, centers and colleges. In addition, the EVPP develops and assures compliance with administrative directives that support the mission of the University. Listed below are some of the administrative responsibilities:

- Institutional accreditation
- Institutional effectiveness
- Strategic and curriculum planning
- Program prioritization
- Student learning and outcomes
- Academic standards
- Student success, retention, and completion
- Academic support for students
- General direction of university scholarship
- Faculty appointments, promotion and tenure and development
- All academic administrative appointments
- Institutional enrollment
- Development of plans and budgets for academic programs and services
- General direction of student services programs and evaluation of academic administrators
- Oversight of faculty personnel and faculty development
- Oversight of faculty governance/advisory system
- Institutional research and data reporting
- Instructional Technology supporting academic programs
- Oversight of institutional policies supporting academic needs

The Vice President for Finance and Administration, Vice President for Student Affairs, Vice President for Research, and Vice President for Health Sciences will have a dual reporting responsibility to the EVPP with a dotted line to the President. The Office of General Counsel, Athletics, Advancement, and the Internal Auditor will report solely to the President.

Position Description:

Position: Executive Vice President and Provost Position Description

I. Position Summary

The Executive Vice President and Provost (EVPP) serves as the chief academic officer of the University and serves as the second in overall responsibility and authority to the President. The EVPP will oversee and align academic and budgetary policy and priorities; ensure the quality of the administration, faculty and student body; help to expand the research enterprise; and maintain the educational excellence of the institution. In helping to lead an innovative community of scholars and students, this individual will provide leadership to support an interdisciplinary, student-centered culture across the campus. In supporting this campus culture, the EVPP will be fully invested in the University's student retention, progression, and completion initiatives. The EVP/Provost will possess a clear academic vision and serve as an articulate and persuasive spokesperson to assist the President in effectively conveying the importance of a research university as a partner to the community and region.

The University Vice Presidents (except for the Office of General Counsel, Vice President of University Advancement, the Athletic Director, and the Internal Auditor) and the Deans will report to the Executive Vice President/Provost. The EVPP is charged with the overall administration of all academic and following administrative units (1) outreach campuses/centers, (2) student affairs, (3) research, (4) finance and administration, (5) libraries, and (6) all divisions, institutes, centers and colleges; works closely with the staff and Deans to develop, implement, and promote educational and scholarship goals; and provides leadership to ensure mission fulfillment of the University's mission. The EVPP will foster and manage program health; ensure that the University's research continues to achieve superior quality; work with the Faculty Senate on matters of academic policies and the general welfare of the University; work with professional and classified staff; and advise the President on plans, policies, and operations.

The EVPP oversees all aspects of professional and academic accreditation, allocation of teaching and research facilities, faculty development, and academic personnel. The ability to coordinate priorities within Idaho's State Board of Education is crucial to all initiatives.

Reports directly to the President.

II. Principal Position Responsibilities

1. Oversees and administers space planning process.

2. Provides leadership to all academic programs and Units and other University operations.

3. Leads assessment of the University strategic plan.

4. Promotes linkage and modification of academic programs to meet the evolving mission of the University, to align academic programs with the strategic plan of the University and to meet the needs of the students and faculty.

5. All academic programs and deans report to the EVPP, as do the Vice Presidents for Finance and Administration, Research, Student Affairs, and Health Sciences.

6. Provides leadership to departments and offices responsible for following functions: diversity and equal opportunity, external academic affairs, faculty development, academic assessment, institutional research, international programs, undergraduate affairs, and others as assigned.

7. Provides leadership and guidance to all Deans to enhance effective operation, cost efficiency and high-quality academic programs.

8. Works with all constituency groups to ensure that the academic programs of the University:
    a. have achieved or are approaching high national ranking, or
    b. are well placed with respect to the University's peer or aspirational benchmark group.

9. Works directly with the Faculty Senate to ensure effective communications with the *Office of the President*.

10. Ensure the operations of the unit fulfills the academic mission of the University.

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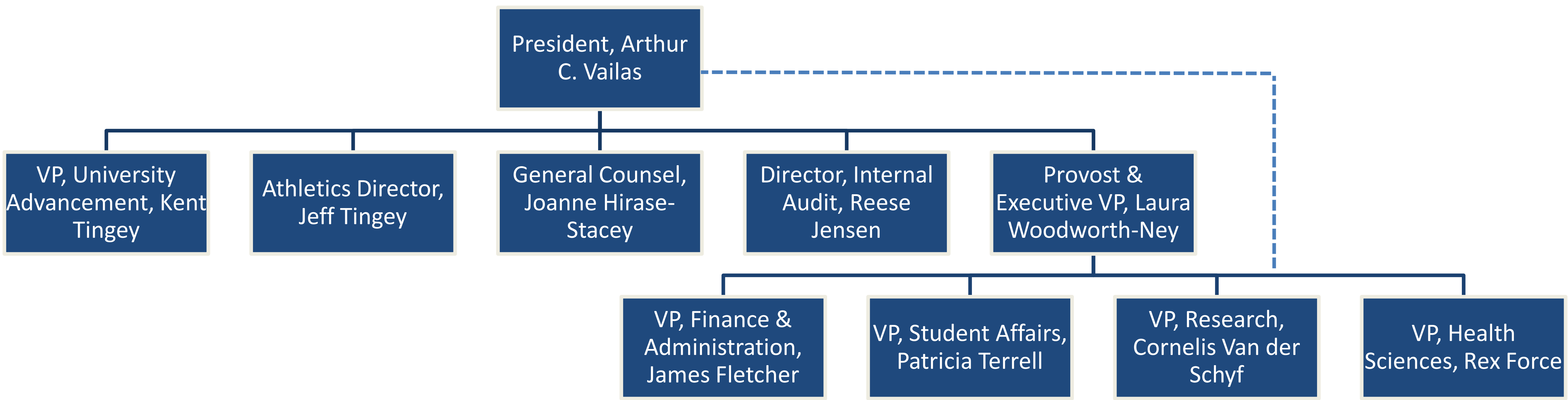
ISU Proposed Executive Organizational Chart



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Laura Woodworth-Ney, Ph.D.
Office of the Provost and Vice President for Academic Affairs
Idaho State University
Pocatello, Idaho 83209-8079
208/282-4024
E-MAIL: woodlaur@isu.edu

CURRENT APPOINTMENT

Provost and Vice President for Academic Affairs, Idaho State University (2013-present).

Founded in 1901, Idaho State University (ISU) is a Carnegie Research Doctoral University serving a student population of approximately 15,000 students per year, representing 48 states and 59 countries. The University houses campus sites in four locations: Pocatello, Meridian, Idaho Falls, and Twin Falls, and maintains an online campus (eISU); all of these report directly to the Office of the Provost and Vice President for Academic Affairs. More than 650 faculty members serve the institution.

The Office of the Provost and Vice President for Academic Affairs oversees more than 250 academic programs ranging from professional technical certificates to PhDs. Idaho State's disciplinary breadth, combined with its unique degree mix, offers opportunity and access commensurate with the Idaho State Board of Education mandate to serve its diverse, largely rural region with technical education, baccalaureate and graduate degree programs, and to provide healthcare programming for the state. Six academic colleges, two schools and a division report to the Office of the Provost and Vice President for Academic Affairs: Division of Health Sciences (includes the College of Pharmacy and the School of Nursing); College of Science and Engineering; College of Arts and Letters (includes the School of Performing Arts); College of Education; College of Business (includes the Informatics Institute); and the College of Technology (includes Continuing Education) and workforce development. In addition, the Office of the Provost oversees the academic support units at the university, including all of the Enrollment Management functions (Recruiting, Admissions, Registrar, Advising, Scholarship Office, International Programs Office, and Financial Aid Advising); the Student Success Center (tutoring, math and English lab support, TRIO programs, retention programs, Intensive English Institute, Honors Program, Native American Student Services, ADA Office, and the Bengal Bridge Program); the Early College Program (dual enrollment programs); the academic component of ISU's e-learning programs (e-ISU); all specialized and institutional accreditation processes; undergraduate affairs and General Education; university strategic planning and institutional effectiveness; the Office of Institutional Research; and all of ISU's campus sites in Pocatello, Idaho Falls, Meridian, and Twin Falls.

The Provost at Idaho State University fills in for the University President, as needed, and chairs the university's Institutional Effectiveness Council, which is comprised of the university's vice presidents.

In addition, the provost testifies before legislative committees and plays an active role at the level of the Idaho State Board of Education.

EDUCATION

Ph.D., 1996	American History and Public History, Washington State University
M.A., 1991	American History, Washington State University
B.A., 1989	English, Cum Laude, Phi Beta Kappa, University of Idaho
Summer Seminar, 1988	Trinity College, Oxford University, in partnership with the University of Massachusetts, Amherst

CURRENT PROJECTS, APPOINTMENTS AND RECENT PUBLICATIONS

Member, Western Interstate Commission for Higher Education (WICHE) Academic Forum, May 2014-present (Chair during 2015).

Member, Council of Academic Affairs, Association of Public and Land-Grant Universities

Founding Faculty Member, Western Academic Leadership Academy (WICHE), Inaugural Class July 2015.

Member, Association of American Chief Academic Officers (ACAO), American Council on Education. Program Committee for 2015-2016.

Laura Woodworth-Ney, Book Review of *South Pass: Gateway to a Continent* (Norman: University of Oklahoma Press, 2014), "Oregon Historical Quarterly," Spring 2015, Volume 116, Number 1, 144-145.

Laura Woodworth-Ney and Tara A. Rowe, "Defying Boundaries: Women in Idaho History," in *Idaho's Place: A New History of the Gem State*, edited by Adam M. Sowards (Seattle: University of Washington Press, 2014), 138-164.

Contributor, "Women and the Myth of the American West," *What it Means to Be an American,* A National Conversation Hosted by the Smithsonian and Zócalo Public Square, http://www.whatitmeanstobeamerican.org/discussions/women-and-the-myth-of-the-american-west/, January 2015.

Gregory E. Smoak and Laura Woodworth-Ney, "Identity, Sovereignty and Idaho's Native Peoples: The Shoshone-Bannock and Coeur d'Alene Experiences," *The Blue Review*, 2013, http://thebluereview.org/identity-sovereignty-idahos-native-peoples/#sthash.OiwGhLJm.dpuf.

Public Talk, Boise City Department of Arts and History, "Reclaiming the West: Women, Environment, and the Irrigation Settlement Movement, 1870-1930," November 10, 2014, Boise, Idaho.

National Endowment for the Humanities Program Panel Reviewer, 2012, 2015.

Idaho Humanities Council Presentation on the Culture of Reclamation, with James Armstrong and Peter Lutze, Twin Falls, Idaho, Summer 2014.

Scholar, *Exploring Idaho's Territorial History*, Idaho Humanities Summer Institute for Teachers, June 2013.

Member, *Educate Idaho College and Career Success Network*, Idaho State Board of Education, Appointed in April 2014.

Scholar Participant, *Idaho State Historical Society Project*, "Idaho State Historical Museum Renovation and Addition," Idaho State Historical Society, Spring 2014-Fall 2014.

Board Member, *Idaho State Historic Sites Review Board*, Idaho State Historic Preservation Office, 2005-present.

Editorial Advisory Board Member, *Pacific Northwest Quarterly*, University of Washington.

TRAINING SEMINARS

Summer 2010	HERS Bryn Mawr Summer Institute for Women in Higher Education Administration, Bryn Mawr College, Pennsylvania
Spring 2012	Complete College America, Higher Education Transform Remediation Institute, Phoenix, Arizona

PREVIOUS ADMINISTRATIVE APPOINTMENTS

2010-2013	*Associate Vice President for Academic Affairs, Idaho State University*
2007-2010	*Chair, Department of History, Idaho State University*
2000-2007	*Co-Director and Director, Women's Studies Program, Idaho State University*

ACADEMIC APPOINTMENTS

2010-Present	*Full Professor, Department of History, Idaho State University*
2005-2010	*Associate Professor, Department of History, Idaho State University*
2000-2005	*Assistant Professor, Department of History, Idaho State University*
1999-2000	*Visiting Assistant Professor, Department of History, Idaho State University*
1999	*Adjunct Faculty, Department of History, University of North Texas, Denton, Texas*
1998	*Associate Instructor, Maryville University, St. Louis, Missouri*
1990-1994	*Teaching Assistant, Department of History, Washington State University*
1994	*Instructor, Washington State Elderhostel Program*
1991-1992	*Instructor, Correspondence Program, Washington State University*

PUBLICATIONS and CURRENT PROJECTS

Books

Laura Woodworth-Ney, *Women in the American West,* Cultures of the American West Series (ABC-CLIO: Santa Barbara, California: 2008), 385 pgs. **(Nominated for the 2008 Western Writers of America Spur Award for Best Historical—Non-Fiction book about the American West)**

________, *Reclaiming Culture: Women, Ideology, and the Settlement of the Irrigated West, 1870-1924* (Tucson: University of Arizona Press, under contract). A study of late-nineteenth century United States culture through the lens of irrigation ideology and gendered irrigation policy. Also examines the lives, writings, cultural influence, and experiences of women in irrigated settlement communities.

Kevin Marsh, Katherine Aiken, and Laura Woodworth-Ney, *Idaho: The Heroic Journey* (Boise: Idaho State Historical Society, 2006). A synthesis of Idaho history commissioned by the Idaho State Historical Society to celebrate its 50th anniversary.

Laura Woodworth-Ney, *Mapping Identity: The Creation of the Coeur d'Alene Indian Reservation, 1805-1902* (Boulder: University Press of Colorado, 2004). **Finalist for the 2005 Idaho Library Association Book of the Year.**

Book Chapters

Laura Woodworth-Ney and Tara A. Rowe, “Defying Boundaries: Women in Idaho History,” in *Idaho’s Place: A New History of the Gem State*, edited by Adam M. Sowards (Seattle: University of Washington Press, 2014), 138-164. **Honorable Mention, 2014 Idaho Library Association Book of the Year.**

Laura Woodworth-Ney, “Water, Culture, and Boosterism: Albin C. and Elizabeth DeMary and the Minidoka Reclamation Project, 1905-1920,” in Brit A. Storey, editor, *A Century of Water for the West, 1902-2002* (Denver: United States Bureau of Reclamation, 2008), 385-405.

________, “The Diaries of a Day School Teacher: Daily Realities on the Pine Ridge Indian Reservation, 1932-1942,” in Richmond L. Clow, editor, *The Sioux in South Dakota History: A Twentieth-Century Reader* (Pierre: South Dakota State Historical Society Press, 2007), 118-137. **Finalist, Indie Excellence Book Awards.**

________, “Elizabeth Layton DeMary and the Culture Club: New Womanhood in a Reclamation Settlement Community,” in Dee Garceau-Hagen, editor, *Portraits of Women in the American West* (New York: Routledge, 2005).

________, “’This Auspicious Movement’: The Growth of Spokane and the Founding of the Northwest Mining Association, 1855-1899,” in Orlan J. Svingen, editor, *The Northwest Mining Association: A Centennial History* (Pullman: The Northwest Mining Association and Washington State University Department of History, 1993).

Articles

Gregory E. Smoak and Laura Woodworth-Ney, “Identity, Sovereignty and Idaho’s Native Peoples: The Shoshone-Bannock and Coeur d’Alene Experiences,” *The Blue Review*, 2013, http://thebluereview.org/identity-sovereignty-idahos-native-peoples/#sthash.OiwGhLJm.dpuf.

James Armstrong, Peter Lutze, and Laura Woodworth-Ney, “VideoPoetry: Evocative Representations of Cultural Pioneers in Southern Idaho,” *The International Journal of Civic, Political, and Community Studies*, Volume 10, Issue 4 (2012), pp.65-87.

Laura Woodworth-Ney, Review Essay of Elliott West, *The Last Indian War: The Nez Perce Story by Elliott West* (Oxford University Press, 2009) and Jerome A. Greene, *Beyond Bear's Paw: The Nez Perce Indians in Canada* (University of Oklahoma Press, 2010), *Ethnohistory*, Volume 59, Issue 2 (Spring 2012): 413-416.

Peter Lutze, James Armstrong, and Laura Woodworth-Ney, “VideoPoetry: Collaboration as Imaginative Method,” *International Journal of the Humanities*, Volume 9, Issue 5:

(February 2012), pp.107-122. **(Won the Award for Excellence in New Directions in the Humanities)**

Laura Woodworth-Ney, "Before Idaho Territory: Peoples at the Center, 1800-1863," *Idaho Landscapes* (March 2013): 18-31.

Peter Lutze, James Armstrong and Laura Woodworth-Ney, "VideoPoetry: Historical Photography in the Desert Garden," *International Journal of the Humanities*, Volume 8, Issue 5 (Summer 2010), pp.43-64. http://ijh.cgpublisher.com/product/pub.26/prod.1856.

Keith Petersen and Laura Woodworth-Ney, "Memories on Main Street: Museums Tell Idaho's Story," *Idaho Landscapes*, Volume 2, Number 1 (Fall 2009): 6-25.

Laura Woodworth-Ney, "Western Women's History: Late Trends and New Directions," *Journal of the West*, Volume 46, Number 3 (Summer 2007): 3-8.

Armstrong, J., Lutze, P., & Woodworth-Ney, "VideoPoetry: Integrating Video, Poetry and History in the Classroom," *International Journal of the Arts in Society*, Volume 3, Issue 5 (2009): 53-66. http://ija.cgpublisher.com/product/pub.85/prod.337

Armstrong, Jamie, Peter Lutze, and Laura Woodworth-Ney, "Developing a Culture of Reclamation: Integrating History, Poetry, and Video," *International Journal of the Humanities*, Volume 2, Issue 2 (2006): 1561-1573. www.Humanities-Journal.com.

J. B. "Jack" Owens and Laura Woodworth-Ney, "Envisioning a Master's Degree Program in Geographically Integrated History," *Journal of the American Association of History and Computing*, Volume 8, Number 2 (2005).

Laura Woodworth-Ney, "Negotiating Boundaries of Territory and 'Civilization': The Coeur d'Alene Indian Reservation Agreement Councils, 1873-1889," *Pacific Northwest Quarterly*, Volume 94, Number 1 (Winter 2002/2003): 27-39.

________, "Water, Culture, and Progressive Politics: Albin C. and Elizabeth DeMary and the Struggle for Local Control of the Minidoka Reclamation Project, 1905-1920," in United States Bureau of Reclamation, *A Century of Water for the West, 1902-2002: Bureau of Reclamation History Symposium Proceedings* (Denver: U.S. Department of the Interior, 2002).

Stephen Adkison, Laura Woodworth-Ney, and Ronald Hatzenbuehler, "Writing Assignment Design and Evaluation in Two American History Survey Courses," (Education Resources Information Center [ERIC]: May 2001), http://www.eric.ed.gov/.

Laura Woodworth-Ney, "The Diaries of a Day School Teacher: Daily Realities on the Pine Ridge Indian Reservation, 1932-1942," *South Dakota History* 24 (Fall/Winter 1994): 194-211.

________, "Whitman County Fairs, 1887-1944," *Bunchgrass Historian: Journal of the Whitman County Historical Society* 20 (1992): 5-24.

Book Reviews (all invited)

Laura Woodworth-Ney, Book Review of *South Pass: Gateway to a Continent*, by Will Bagley (Norman: University of Oklahoma Press, 2014), *Oregon Historical Quarterly*, Volume 116, Number 1 (Spring 2015): 144-145.

________, Book Review of *The First We Can Remember: Colorado Pioneer Women Tell Their Stories*, Edited and with an introduction by Lee Schweninger (Lincoln: University of Nebraska Press, 2011), *South Dakota History*, Volume 43, Issue 2 (Summer 2013): 173.

________, Book Review of *Federal Fathers and Mothers: A Social History of the United States Indian Service, 1869–1933*, by Cathleen D. Cahill (Chapel Hill: University of North Carolina Press, 2011), *Western Historical Quarterly*, Volume 43, Number 2 (Summer 2012), p. 219.

_________, Book Review of *Bitter Water: Diné Oral Histories of the Navajo—Hopi Land Dispute, Edited and Translated by Malcolm D. Benally*, Foreword by Jennifer Nez Denetdale (Tuscon: The University of Arizona Press, 2011), *The Oral History Review*, Volume 39, Number 2 (2012): 389-392.

________, Book Review of *The World, The Flesh, and the Devil: A History of Colonial St. Louis,* by Patricia Cleary (Columbia: University of Missouri Press, 2011) *Journal of Illinois History*, Volume 14, Issue 2 (Summer 2011).

________, Book Review of *Shadow Tribe: The Making of Columbia River Identity*, by Andrew Fisher (Seattle: University of Washington Press, 2010), *Pacific Historical Review* 80, Number 4 (November 2011): 650-651. *America: History & Life*, EBSCO*host* (accessed March 25, 2012).

________, Book Review of *Broken Treaties: United States and Canadian Relations with the Lakotas and the Plains Cree, 1868-1885*, by Jill St. Germain (Lincoln: University of Nebraska Press, 2009), *Great Plains Quarterly*, Volume 30, Issue 3 (Summer 2010): 223-224.

________, Book Review of *Agnes Lake Hickok: Queen of the Circus, Wife of a Legend*, by Linda Fisher (Norman: University of Oklahoma Press, 2009), *South Dakota History*, Volume 39, Issue 3 (Fall 2009): 277-278.

________, Book Review of *The Bear River Massacre and the Making of History*, by Kass Fleisher (NewYork: State University of New York Press, 2004), *American Indian Quarterly*, Volume 32, Number 1 (Winter 2008): 113-115.

________, Book Review of *Inconstant Companions: Archaeology and North American Indian Oral Traditions*, by Ronald J. Mason (Tuscaloosa: University of Alabama Press, 2006), *Oral History Review*, Volume 35, Number 1 (Winter/Spring 2008): 112-114. http://muse.jhu.edu/journals/oral_history_review/toc/ohr.35.1.html

________, Book Review of *The Cowboy Girl: The Life of Caroline Lockhart*, by John Clayton (Lincoln: University of Nebraska Press, 2007), *Oregon Historical Quarterly*, Volume 109, Number 1 (Spring 2008): 159-161.

________, Book Review of *The San Diego World's Fairs and Southwestern Memory, 1880-1940*, by Matthew Bokovoy (Albuquerque: University of New Mexico Press and the San Diego Historical Society, 2005), *American Historical Review*, Volume 112, Issue 1 (2007): 207-208.

________, Book Review of *Domesticating the West: The Re-creation of the Nineteenth-Century American Middle Class*, by Brenda K. Jackson (Lincoln: University of Nebraska Press, 2005), *Montana: The Magazine of Western History*, Volume 56, Number 2 (Summer 2006): 75-76.

________, Book Review of *The Line Which Separates: Race, Gender, and the Making of the Alberta-Montana Borderlands*, by Sheila McManus (Lincoln: University of Nebraska Press, 2005), *Journal of American Ethnic History*, Volume 24, Number 4 (Summer 2006): 196-198.

________, Book Review of *Assimilation's Agent: My Life as a Superintendent in the Indian Boarding School System*, by Edwin L. Chalcraft, edited by Cary C. Collins (Lincoln: University of Nebraska Press, 2004), *Western Historical Quarterly*, Volume 36, Number 4 (Winter 2005): 511.

________, Book Review of *Lelooska: The Life of a Northwest Coast Artist*, by Chris Friday, *Pacific Northwest Quarterly*, Volume 96, Number 3 (Summer 2005): 158-159.

________, Book Review of *A Necessary Balance: Gender and Power Among the Indians of the Columbia Plateau*, by Ackerman, Lillian (Seattle: University of Washington Press, 2004), *Pacific Northwest Quarterly* 96 (Winter 2004/2005): 46-47.

________, Book Review of *Edna and John: A Romance of Idaho Flat*, by Duniway, Abigail Scott, ed. Debra Shein (Pullman: Washington State University Press, 2000) *Pacific Northwest Quarterly* 92 (Fall 2001): 210-211.

Encyclopedia Entries

Laura Woodworth-Ney, "Francis G. Newlands," "Snake River Basin," "Yakima Irrigation Project," essay-length entries in Steven L. Danver and John R. Burch, Jr., Editors, *Encyclopedia of Water Politics and Policy in the United States* (New York: CQ Press, 2011), 325-327; 476-477; 490-491. **Selected by *Choice* magazine, the American Library Association's flagship publication, for its Outstanding Academic Title list for 2012**

________, "Idaho," and "Coeur d'Alene, Idaho," essay-length entries in Steven L. Danver, *Encyclopedia of Politics in the American West* (New York: CQ Press, 2013).

Creative Activity

Armstrong, J., Lutze, P., & Woodworth-Ney. (2008, public screenings). *Mary Hallock Foote at Stone House*. Boise, ID: Wolf Peach Press. Cross-disciplinary video (A VideoPoetry Project).

Articles in the Popular Press

Laura Woodworth-Ney, "Women of the Old West: Telling Story of Role Females Played in Western Past," *Insight* cover story, *Idaho State Journal*, Sunday Edition, June 29, 2008.

Other

J.B. "Jack" Owens, Kevin Marsh, Laura Woodworth-Ney, "Idaho State University Creates Innovative Program in History and GIS," *ArcNews* (Fall 2005); the trade publication of ESRI, the world's largest producer of GIS software; print circulation of 600,000+.

Laura Woodworth-Ney, *Report of the Idaho State University Presidential Task Force on Diversity*, funded by the President's Office, Idaho State University, July 2007 (Authored in conjunction with the Idaho State University Presidential Task Force).

Alex Coziah and Laura Woodworth-Ney, *Benchmarking Study of History Departments of the Rocky Mountain Region*, funded by the College of Arts and Sciences, Department of History, and Office of Research, Idaho State University, May 2008.

Media Appearances and Professional Consultation

Interviewee, "Pathways of the Pioneers: Idaho's Oregon Trail Legacy," *Idaho Public Television*, television video, premiered on *Idaho Public Television* during summer 2009

Historical consultant and interviewee, "The States," *The History Channel*, television video, premiered nationally April 2007

Cover Story for *Idaho State Journal* Entertainment Guide (with Kevin Marsh) for *Idaho: The Heroic Journey* (Boise: Idaho State Historical Society: Boise, 2006), January 2007

Lunch interview for *Mapping Identity* book, NBC Channel 6 News, Pocatello, Idaho, January 2006

Invited radio interview with Bob Kustra, President of Boise State University (New Horizons in Education with Bob Kustra), Boise, February 2005
http://132.178.236.111/stations/npr/NewHorizons.asp

Interview for "Noteworthy People" Column, *Idaho Issues Online* magazine, Boise State University, Fall 2004,
http://www.boisestate.edu/history/issuesonline/fall2004_issues/p4_notepeople.html

EDITORSHIPS and EDITORIAL WORK
Founding co-editor, *Idaho Landscapes: The Magazine of Idaho History*, Idaho State Historical Society, 2009-2013

Executive Editor, Center for Idaho History and Politics, Boise State University, 2008-2010
- Dedicated to pragmatic applications of social science research, the Center promotes the responsible study of history and politics through publications, exhibitions, forums, workshops and tours

Editor-in-chief, *Idaho Yesterdays: The Journal of Idaho History*, 2003-2008
- Oversaw all aspects of acquisition, editing, and production
- Completely redesigned the journal in 2003
- Won the Idaho Heritage Trust Media Award in 2006
- Thematic issues have included *Outdoor Idaho, Ethnic Mosaic, Sacred Sites, Idaho Sees Red, Idaho Exchanges* and *Telling Tales*

Editor, *Women's Western Voices* Book Series, University of Arizona Press, 2003-Present
- Dedicated to the publication of women's history of the American West
    - Published titles:

  - Cynthia Prescott Culver, *Gender and Generation on the Far Western Frontier*, Women's Western Voices Series (Tucson: University of Arizona Press, 2007)
  - Jennifer Dawes Adkison, *Across the Plains: Sarah Royce's Western Narrative,* Women's Western Voices Series (Tucson: University of Arizona Press, 2009)
  - Melcher, Mary S., *Pregnancy, Motherhood, and Choice in 20th Century Arizona* (Tucson: University of Arizona Press, 2012)

- Editorial Advisory Board, Idaho State Historical Society, Boise, Idaho
- Editorial Board Member*, Pacific Northwest Quarterly,* 2006-Present
- Editorial Board Member, *Idaho State University Press*, 2007-Present
- Book reviewer for *American Historical Review, Pacific Historical Review, Western Historical Quarterly, Pacific Northwest Quarterly, Montana: The Magazine of Western History, Oral History Review, Journal of American Ethnic History, American Indian Quarterly, Great Plains Quarterly, South Dakota History, Idaho Yesterdays*
- Textbook reviewer for Bedford/St. Martin's and Pearson
- Manuscript reviewer for University of Utah Press, University of Washington Press, University of Arizona Press, University of Oklahoma Press and University of Nebraska Press

BOOK PRIZE COMMITTEES

- Chair, Gita Chaudhuri Award for Best Published Book About Rural Women, Western Association of Women Historians, 2010-2011 (Chair)
- John Ewers Award for Best Published Book on North American Indian Ethnohistory, Western History Association (2010-2012; Chair 2012)

EXTERNAL FUNDING PROPOSALS and PROJECTS

(2010) Chief Humanist, **Idaho Humanities Council,** Cassia County Historical Society **(Tom Blanchard, Project Director, funded $3,000)**

(2009) Social Studies Consultant**, No Child Left Behind Act of 2001, Title II, Part A, Subpart 3, Eligible Partnership Sub-grants, Total Instructional Alignment,** Intermountain Center for Education Effectiveness, Idaho State University **(Chuck Zimmerly, Principle Investigator, funded)**

(2009) Social Studies Consultant**, No Child Left Behind Act of 2001, Title II, Part A, Subpart 3, Eligible Partnership Sub-grants, Continuation of the Development of Middle School Highly Qualified Teachers,** Intermountain Center for Education Effectiveness, Idaho State University **(Chuck Zimmerly, Principle Investigator, funded)**

(2009) Social Studies Consultant**, No Child Left Behind Act of 2001, Title II, Part A, Subpart 3, Eligible Partnership Sub-grants, Teacher Evaluation Model Pilot,** Intermountain Center for Education Effectiveness, Idaho State University **(Chuck Zimmerly, Principle Investigator, funded)**

(2008) National Endowment for the Humanities, "The Urban Landscape of Vice, Health, and Gender in the Interior West: Working and Elite Women in Helena, Cody and Pocatello, 1884-1931," Co-PI (Sarah Hinman, PI), Department of History, Idaho State University, submitted November 2008 to the Collaborative Research Program, $390,000 (not funded)

(2008) Idaho State Board of Education, "Redesigning the Goal 9 Course: United States History and Culture," Technology Incentive Grant, Co-PI (Barry Maheras, PI), submitted February 2008 **(funded $90,000; extension awarded for continuation until May 2010).**

(2008) National Science Foundation, "Geographies of Human-Environment Interactions in Multiple Grassland Landscapes: Historical Case Studies of Idaho, Spain, and Mongolia," Co-PI (Keith Weber, PI), GIS Center and the Department of History, Idaho State University, submitted January 2008 to the Geography and Regional Science Division, $895,214 (not funded).

(2007) National Science Foundation, "Affect and Interaction of Human Activity and Environmental Processes on Rangeland Health," Co-PI (Keith Weber, PI), GIS Center and the Department of History, Idaho State University, submitted January 2007 to the Geography and Regional Science Division, $500,000 (not funded).

(2005) Montana State Historical Society, James Bradley Fellowship Application to study irrigation in Montana **(awarded $2500). Spent four weeks at the Montana State Historical Society as a James Bradley Fellow during summer 2005.**

(2004) Idaho Humanities Council, "Reviving Idaho Yesterdays," PI, Submitted September 2004 **(funded $5012).**

(2003) Redd Center for Western Studies, Brigham Young University-Provo, Faculty Fellowship, Travel Support**, (funded $1500).**

(2002) Idaho Humanities Council, Key Humanist, "A Landscape Legacy: Pioneer Trails of Minidoka and Cassia Counties," Key Humanist, sponsored by the Oregon Trail Botanical Garden, Dale Whipple, Project Director, December 2002 (**funded $2000).**

(2002) Idaho Humanities Council, Humanities Consultant for proposal, "Biologues: Women in History," sponsored by Women's Studies at Idaho State University and Idaho State University Professional Women, submitted December 2002 **(funded $2000).**

CONFERENCE PRESENTATIONS and INVITED LECTURES
Frequent invited guest lectures in History of Psychology, First Year Seminar, Honors Seminar and Historical Geography of Idaho at Idaho State University (2005-present)

Jamie Armstrong, Peter Lutze, and Laura Woodworth-Ney, Paper Presentation, 10th **International Conference on New Directions in the Humanities**, Montreal, Canada, June 2012.

Laura Woodworth-Ney, Paper Presentation, “Creating Idaho: Native Boundaries and Reservation Politics,” as part of joint panel “Idaho and Race” with Jill Gill and Errol Jones, Annual Meeting of the **Western Historical Association**, Oakland, California, October 2011.

Laura Woodworth-Ney, Paper Presentation, “Public History and Higher Education Administration,” Panel on Public History, Education, and New Communities, **National Council on Public History**, Pensacola, Florida, April 2011.

Panel Commentator, “Women, Gender and Western Rural Work,” Annual Meeting of the **Western Historical Association**, Denver, Colorado, 2009

Keynote Speaker, “Women in the American West,” **P.E.O. Regional Women’s Luncheon**, Juniper Hills Country Club, April 2009

Paper Presentation (not attending), Sarah Hinman lead author and Laura Woodworth-Ney co-author, “The Urban Landscape of Vice and Gender in the Interior West: Mapping Women in Helena, Montana, 1884 – 1930,” annual meeting of the **Association of American Geographers**, Las Vegas, NV, March 27, 2009

Invited Speaker for **Department of Anthropology Friday Colloquium**, “Reclaiming the Territories: Women, Elites and the Ideology of the United States Irrigation Movement, 1870-1930,” Idaho State University, February 20, 2009

Paper Presentation (not attending), co-author with Sarah Hinman and Kevin Marsh, “Mapping Disaster, Commerce, Vice, and Disease: Student and Faculty Research in Historical Resources Management,” 123rd annual meeting of the **American Historical Association**, New York, New York, January 4, 2009

Paper Presentation (not attending), co-author with James Armstrong and Peter Lutze, “VideoPoetry: Integrating Video, Poetry and History in the Classroom,” **International Conference on the Arts in Society**, Birmingham Institute of Art and Design, Birmingham, United Kingdom, July 28-31, 2008

Paper Presentation, "Reclaiming the Territories: Women, Elites and the Ideology of the Irrigation Movement, 1870-1924," **Agricultural History Society Conference**, University of Nevada, Reno, June 2008

Panel Commentator, *Women in the Pacific Northwest*, **Western Association of Women's Historians Conference**, Vancouver, British Columbia, May 2008

Featured Scholar Address, "Education, Citizenship and the History of Opportunity," **Future Scholars of Idaho Event**, Idaho State University Honors Program, April 2008

Comment, "Matrimony Matters: Labor, Land, and Law in the Construction of Marriage in the American West," **American Historical Association Meeting**, Washington, D.C., January 2008

Visiting Lecturer for Institute of Pacific Northwest Studies, "Reclaiming Culture: Women Pioneers in the Garden of Irrigation, 1870-1924," University of Idaho, October 2007

Luncheon speaker, "The Minidoka Reclamation Project," **Rupert Rotary Club**, November 2007

Luncheon speaker, "Women's Clubs in Idaho," **Pocatello Retired Teachers Association**, March 2007

Invited talk, *Idaho Yesterdays*, Chapter B.A., **P.E.O. Women's Organization**, May 2007

Round Table Panel Presentation, *GIS and Women's History*, Presented at the **American Historical Association Meeting**, January 2007, Atlanta, Georgia

Paper Presentation, *"The Best-trained Ditch Can Never be a River, Nor the Gentlest Wife a Girl Again": The Female Literary Critique of the Irrigated Landscape*, Presented at the **Western Literature Association** Annual Conference, October 2006, Boise, Idaho

Round Table Panel Presentation, *Using GIS to Study Western Women*, Presented at the **Western History Association** Annual Conference, October 2006, St. Louis, Missouri

Round Table Panel Presentation, *The Gender Gap in Higher Education*, Presented at the **Western Social Sciences Association** Meeting, April 2006, Phoenix, Arizona

Panel Moderator and Chair, *Raising the Marginal: Female Migration and National Identity Formation*, **Western Social Sciences Association** Meeting, April 2006, Phoenix, Arizona

Panel Presentation, *New Takes on Idaho's History*, Biennial **Idaho History Conference**, Idaho State University, March 2006

Panel Moderator and Commentator, *Gender in Other Times and Other Places,* **Art of Gender Conference**, Idaho State University, March 2006

Keynote Speaker for Student Affairs Research Colloquium, Idaho State University, December 2005

Panel Chair, "The Power of Irrigation: The Effects of Power on People and Land in the American West," **American Society for Environmental History Conference**, March 2005, Houston, Texas

Panel Presentation with J.B. "Jack" Owens and Kevin Marsh, "Geographically Integrated History," **Intermountain Geographic Information Systems Users' Conference**, April 2005, Pocatello, Idaho

Invited talk, "Reclaiming Culture: The DeMarys and the Settlement of Irrigated Idaho," **Rupert Rotary Club**, Rupert, January 19, 2005

Invited talk, "Historical Overview of Separation of Powers," for the legal organization **Inns of Court of Southeast Idaho**, Pocatello, April 2005

Invited talk, "Nineteenth-century Clubwomen in Idaho," for the women's organization, **P.E.O. Women's Organization**, Rupert, Idaho, May 2005

Featured Speaker for Award Banquet, "Women in Higher Education," **Idaho State Convention of P.E.O.**, June 2005

Fall Speaker for Utah Valley State College "Turning Points" Lecture Series, "Reclaiming Culture: The Cultural Significance of Irrigation," Orem, Utah, September 2005

Invited Speaker for **American Medical Association of Southern Idaho**, "Irrigation and the Settlement of the West," Pocatello, October 2005

Invited Speaker for **Ohio State University's GIS Lecture Series**, "Using GIS to Study Women's History," Columbus, Ohio, December 2005

Chair for session entitled "The 'Power' of Irrigation: The Effects of Federal Reclamation on People and Land in the American West," **American Society for Environmental History** Conference, Houston, Texas, April 2005

Developing a Culture of Reclamation (An Interdisciplinary Video Project), co-authored with James O. Armstrong, Boise State University, and Peter C. Lutze, Boise State University, a paper presented by James O. Armstrong at the **International Humanities Conference, Monash University Centre, Prato, Italy**, July 20-23, 2004.

Commentator for session entitled "Single Women and Married Women in the West," Annual Meeting of the **Western History Association**, Las Vegas, Nevada, October 13-16, 2004

Discussant for session entitled "Economic Influence and the Influence of Economics," **The Art of Gender in Everyday Life Conference**, Idaho State University, Pocatello, Idaho, March 2004

"Envisioning a GIS-Based Master's Degree Program in History," a paper presented (co-authored with Jack Owens) at the **Annual American Historical Association** Meeting, Washington, D.C., January 8-11, 2004

"Building a Progressive Culture: Women's Clubs and the Settlement of Irrigated Idaho, 1890-1920," a paper presented at the Annual Meeting of the **Western History Association** Meeting, Fort Worth, Texas, October 9, 2003

"Reclaiming Culture: Women's Literary Societies and the Formation of Irrigated Settlement Communities, 1870-1920," a paper presented at the **Study of American Women Writers Conference**, September 26, 2003

Invited Talk, "Women Pioneers in Southern Idaho, 1870-1900," Chapter B.A. of **P.E.O. Women's Organization**, July 4, 2003

"Reclaiming Culture, Reconciling Place: Women's Clubs and the Reassessment of Irrigated Settlement, 1890-1920," a paper presented at the 56^{th} Annual **Pacific Northwest History Conference**, April 24-26, 2003, Bellingham, Washington

"Reclaiming Culture, Reconciling Place: Gender, Class and Women's Clubs in the Irrigated West, 1890-1920," a paper presented at the **Western Social Sciences Association** Meeting, April 9-12, 2003, Las Vegas, Nevada

"Water, Gender, and Class: Women's Cultural Societies in Irrigated Settlement Towns, 1870-1920," a paper presented at the **Rural Women's Studies Association Conference**, February, 20-23, 2003, Las Cruces, New Mexico

"Chief Andrew Seltice and the Agreement of 1889: Federal Policy and Internal Division on the Coeur d'Alene Indian Reservation," a paper presented as part of a panel entitled "Immigrants, Native Americans, and Federal Policy: Overlapping Diasporas in Nineteenth-Century America" at the 2002 **Annual Meeting of the Organization of American Historians**, April 11-14, Washington, D.C.

"Water, Culture and Progressive Politics: Albin and Elizabeth DeMary and the Struggle for Local Control of the Minidoka Reclamation Project, 1905-1920," a paper presented at the **Bureau of Reclamation Centennial History Symposium**, June 17-19, 2002, University of Nevada–Las Vegas, Las Vegas, Nevada

"Reconciling Place: Searching for the Women's Narrative in Irrigated Idaho," invited paper presented as part of a session entitled "Fiction, History, and Interpretation: Whose Truth?" at 2002 **Boise Bookfest**, Log Cabin Literary Center, September 12-15, 2002, Boise, Idaho

"Mary Hallock Foote, Elizabeth DeMary, and Annie Pike Greenwood: Landscapes of Gender and Culture in the Irrigated West, 1880-1920," Invited Talk, **Lava Hot Springs Historical Society**, January 2002, Lava, Idaho

"Mary Hallock Foote, Elizabeth DeMary, and Annie Pike Greenwood: Landscapes of Gender and Culture in the Irrigated West, 1880-1920," Guest Lecture, **Idaho Historical Geography Televised Course**, Idaho State University, November 2001, Pocatello, Idaho

" 'This is Not an English Class!': Using Creative Writing Assignments in the History Survey Course," presented as part of a panel entitled "Writing History: Writing Assignment Design and Evaluation in Two American History Survey Courses" at the **Writing Across the Curriculum Conference**, May 31-June 2, 2001, Bloomington, Indiana

"'A Glorious Future That No Man Can Doubt': Albin C. DeMary and the Fight for Local Control of the Minidoka Reclamation Project, 1905-1920," a paper presented at the 41st Annual **Western History Association Conference**, October 2001, San Diego, California

"Wallace Stegner and Donald Worster: 'Old' and 'New' Perspectives on Water and Power in the American West," **Department of History Lecture Series**, Idaho State University, May 2001, Pocatello, Idaho

"'A Glorious Future That No Man Can Doubt': Albin C. DeMary and the Fight for Local Control of the Minidoka Reclamation Project, 1905-1920," a paper presented at the 53rd Annual **Pacific Northwest History Conference**, April 2000, Spokane, Washington

"'One Great Dissatisfaction': The Coeur d'Alene Indians, the Simpson Commission, and the Corrupt Bargain of 1889," a paper presented at the 52nd Annual **Pacific Northwest History Conference**, April 1999, Victoria, British Columbia, Canada

"Corrupt Bargain or Fair Contract?: The Coeur d'Alene Indians and the Agreement of 1889," a paper presented as part of the **Missouri Historical Society** "Research-in-Progress" Seminar, 12 December 1997, St. Louis, Missouri

"The Coeur d'Alene Indian Reservation: Tribal Sovereignty Betrayed," a presentation given to Chapter DV, **P.E.O. Women's Organization**, 27 February 1997, Irving, Texas

"The Conquest of Coeur d'Alene Waterways: Severalty and the Coeur d'Alene Indian Tribe, 1889-1933**,"** a paper presented at the 48th Annual **Pacific Northwest History Conference,** March 3, 1995, TriCities, Washington

"'This Auspicious Movement': The Growth of Spokane and the Founding of the Northwest Mining Association, 1855-1899," a paper presented at the 47th **Annual Pacific Northwest History Conference**, March 26, 1994, Bellingham, Washington

"The Diaries of a Day School Teacher: Daily Realities on the Pine Ridge Indian Reservation, 1932-1942," a paper read at the 28th Annual **Northern Great Plains History Conference**, 2 October 1993, Pierre, South Dakota

ADMINISTRATIVE EXPERIENCE

Associate Vice President, Academic Affairs, Idaho State University, June 2010-June 2013

- Curriculum management and academic program development
- Liaison for the State Board Office for academic program development, remedial education, general education, and K-12 initiatives
- Student retention liaison for the Office of Academic Affairs
- Marketing/University Relations liaison for the Office of Academic Affairs
- Academic Affairs budget management, analysis, and processes
- Program outreach and the Twin Falls-ISU outreach site
- Support for the provost in the areas of faculty tenure and promotion, academic strategic planning, accreditation, faculty development, dean searches and hires, and dean meetings
- Directly responsible for employees in the Office of the Registrar, the Early College Program and the Twin Falls-ISU campus

Chair, Department of History, Idaho State University, July 2007-May 2010

- With the faculty, responsible for developing and maintaining the curriculum and managing all faculty affairs for a program offering the B.A. in History, M.A. in Historical Resources Management, and M.A. in Interdisciplinary Historical Studies
- With the faculty, responsible for developing and maintaining the curriculum and advising students in Secondary Education with a History major, History minor, or Social Studies major or minor, and for advising Elementary Education with a History emphasis students (100+ students)
- Responsible for budget administration and policy
- Responsible for allocating budgets relative to course offerings and faculty research initiatives, while maintaining the department's instructional responsibility for two general education requirements

- Responsible for facilitating grant proposal generation, including proposals to the National Science Foundation
- Responsible for department development activities
- Responsible for facilitating the editorial oversight of the peer-reviewed journal, *Idaho Yesterdays*
- Responsible for serving departments dependent on the program in History, supervising the administrative staff, and interfacing with the dean's and provost's offices

Co-Director of Women's Studies, Idaho State University, 2000-2007
- Responsible for developing and maintaining the curriculum for a minor program with 80+ declared minors

Executive Committee, Faculty Senate, Idaho State University, 2006-2007
- Represented the Faculty Senate on the Presidential Task Force for Diversity

Social Sciences Representative, Faculty Senate, Idaho State University, 2005-2006

LECTURE SERIES and VISITING LECTURE ORGANIZING

Co-sponsor (as editor) of the *Idaho Yesterdays* Lecture Series (co-sponsored by American Studies Program at Idaho State University), 2004-2007
- Visiting lecturers since 2004 include Landon Jones, Greg Smoak, Elliot Oring, and Peter Boag

Department of History Sponsored Lectures
- Terry Tempest Williams, Spring 2008

Cultural Affairs Council, Idaho State University, 2005-2007
- Hosted Louis Warren, author of *Buffalo Bill's America*, Spring 2007
- Hosted Philip Deloria, author of *Playing Indian*, Fall 2006

SELECTED SERVICE

Department/College/University, Idaho State University

Served as a mentor for the WeLEAD Mentoring Program, Idaho State University, 2008-2009
Tenure and Promotion Committee, Department of English, Idaho State University
75th Anniversary Celebration Planning Committee, Idaho Natural History Museum, Idaho State University
Faculty-at-Large Representative (Elected by Faculty Senate) on Diversity Center Advisory Board, Idaho State University, 2007-2011
Arts and Sciences Dean Search Committee, ISU, 2006-2008 (Two Years)

Presidential Task Force for Diversity, Idaho State University, 2006-2007
Course Redesign Team, Idaho State University, 2007-present

- Team attended National Redesign Conference, Orlando, Florida, March 2007

Faculty Grievance Appeals Procedure Review Committee, Faculty Senate, Idaho State University, 2006-2007
Curriculum Committee, History Department, Idaho State University, 2003-2006
College of Arts and Sciences Tenure and Promotion Advisory Committee, Idaho State University, 2001-2003
Center for Teaching and Learning Advisory Committee, Idaho State University 2002-2003
Humanities and Social Studies Research Committee, Idaho State University, 2000-2003
Financial Aid Appeals Committee, Idaho State University, 2000-2003
Promotion and Tenure Committee for Jennifer Eastman Attebery, 2000-2001

Local/State/National Professional Activity
National Endowment for the Humanities Program Panel Reviewer, 2012
Chair, Gita Chaudhuri Award Prize Committee, Western Association of Women Historians, 2010-2012
John C. Ewers Award Prize Committee, Western History Association, 2010-2012 (Chair, 2012)
Board of Trustees Member, Idaho Center for the Book, Boise State University, 2009-present
Program Committee for the Annual Pacific Northwest History Conference, Washington State Historical Society, 2009
Board of Directors, Redd Center for Western Studies, Brigham Young University, 2003-2014
State Historic Sites Review Board, State Historic Preservation Office, State of Idaho, 2005-2014
Idaho Humanities Council Evaluator
Cultural Affairs Council, Idaho State University, 2005-2010
Historic Preservation Commission, Pocatello, Idaho, 2001-2005
President, American Association of University Women, 2004-2005
Program Committee for the Western History Association, 2004
Academic Evaluator for the Idaho Humanities Council
Sign Ordinance Committee, City of Pocatello, Pocatello, Idaho, 2003-2005
Historical Preservation Commission, Rupert, Idaho, 2000-2003

HISTORICAL CONSULTING

1997-1998	Historical Consultant, City of Chesterfield, Missouri
1996-1997	Historical Consultant, City of Irving, Texas
1994-1996	Development Officer and Historical Consultant, Kalakala Foundation, Seattle, Washington
1995	Historical Consultant, Water Rights Issues, Law Firm of Ling and Nielsen, Rupert, Idaho

AWARDS for HISTORICAL RESEARCH/EDITING

2010	Idaho State Journal Business Award Nominee
2006	Idaho Heritage Trust Media Award for *Idaho Yesterdays*
2004-2005	Humanities and Social Sciences Research Award, Idaho State University
2003-2004	Faculty Fellowship, Redd Center for Western Studies, $1500
2003	University of Wyoming American Heritage Center Travel Grant, $250
2002	Faculty Research Committee Award, Idaho State University
2002	Computer Systems Advisory Committee Computer Upgrade, $200
2002	Research Coordinating Council Release Time Award, Idaho State University
1993-1995	P.E.O. Graduate Scholarship Awards (2), $12,000
1992	Margaret Pettyjohn Graduate Research Fellowship, $2,500
1989	University of Idaho Senior Woman of the Year
1985-1989	Grace V. Nixon Memorial Scholarship, University of Idaho, $13,000 (full-ride tuition and room and board for four years)
1988	Delores Scott Memorial Scholarship, University of Idaho, $1,000
1988	University of Idaho Alumni Parents' Association Scholarship, $250

REFERENCES

Upon request.

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BUSINESS AFFAIRS AND HUMAN RESOURCES
AUGUST 11, 2016

TAB	DESCRIPTION	ACTION
1	**FY 2018 LINE ITEMS**	Motion to approve
2	**FY 2018 CAPITAL BUDGET REQUESTS**	Motion to approve
3	**INTERCOLLEGIATE ATHLETIC REPORTS** NCAA Academic Progress Rate (APR) Scores	Information item
4	**IDAHO NATIONAL LABORATORY** Board Sponsorship of Idaho National Laboratory Project	Motion to approve
5	**BOISE STATE UNIVERSITY** Oracle HCM Cloud Application Licensing Agreement	Motion to approve
6	**IDAHO STATE UNIVERSITY** Land Use Swap between ISU and Idaho State University Federal Credit Union	Motion to approve
7	**IDAHO STATE UNIVERSITY** Disposal of Real Property - O'Neall Property in McCammon, Idaho	Motion to approve
8	**IDAHO STATE UNIVERSITY** Ground Lease – Idaho College of Osteopathic Medicine	Motion to approve
9	**IDAHO STATE UNIVERSITY** Online Program Fee – Community Paramedic Academic Certificate Program	Motion to approve
10	**EASTERN IDAHO TECHNICAL COLLEGE** Right of Way Agreement – City of Idaho Falls	Motion to approve

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AGENCIES AND INSTITUTIONS OF THE STATE BOARD

SUBJECT
FY 2018 Line Item Budget Requests

REFERENCE

April 2016	Board approved guidance to the college and universities regarding submission of line item budget requests
June 2016	Board directed the Business Affairs and Human Resources Committee to review the FY 2018 budget line items and to bring recommendations back to the Board for its consideration at the regular August 2016 Board meeting

APPLICABLE STATUTE, RULE, OR POLICY
Idaho State Board of Education Governing Policies & Procedures, Section V.B.1.
Title 67, Chapter 35, Idaho Code

BACKGROUND/ DISCUSSION
As discussed at its April 2016 Board meeting, the Board directed the college and universities to limit any Fiscal Year 2018 budget line item requests to those which will measurably support implementation of the Board's strategic plan. Institutions may request up to two (2) line items in priority order, the total value of which shall not exceed five percent (5%) of an institution's FY2017 total General Fund appropriation. Any requests for occupancy costs will not count towards the two line items or the 5% cap.

At the June 2016 board meeting, the institutions and agencies presented their Line Item requests. The Board directed the Business Affairs and Human Resources Committee to review the FY 2018 budget line items and to bring recommendations back to the Board for its consideration at the regular August 2016 Board meeting.

The list of Line Items in Attachments 1 and 2 are not listed in priority order, however they include each agency and institution's priority rank for each item. Upon final approval the line items will be included in the institution and agency budget submissions to the Legislative Services Office (LSO) and the Division of Financial Management (DFM).

IMPACT
The approved Line Items will be included with the FY 2018 budget requests and submitted to DFM and LSO for consideration by the Governor for his FY 2018 Budget recommendations and by the Joint-Finance Appropriations Committee for funding.

ATTACHMENTS

STAFF COMMENTS AND RECOMMENDATIONS

The Idaho state budget request process is based on Base-plus budgeting as follows:

Base Budget:	Historical budget based on years of appropriations
MCO:	Maintenance of current operations; formula driven for uncontrollable factors such as general salary increases and cost inflation.
Line Items:	Enhancements for new programs and initiatives

Base budgeting allows the agencies and institutions to derive a reasonable dollar estimate in order to manage their programs and staffing levels from one year to the next. This is also true for the higher education institutions whose budgets are consolidated for four year institutions and for two-year community colleges.

Since the June Board meeting, staff added a line item under State Board of Education for a one-year contract to develop a ten-year strategic plan to advance Graduate Medical Education for the state of Idaho.

The Division of Vocational Rehabilitation had a placeholder for its line item to add additional program funds for Extended Employment Services. The Division has now included a total cost of $214,300 for this line item.

There were no other material changes to the line items between the June and August meetings. Staff recommends approval.

BOARD ACTION

I move to approve the Line Items for the agencies and institutions as listed in Attachments 1 and 2, and to authorize the Executive Director to approve the MCO and Line Item budget requests for agencies and institutions due to the Division of Financial Management and Legislative Services Office on September 1, 2016.

Moved by __________ Seconded by __________ Carried Yes _____ No _____

STATE BOARD OF EDUCATION

FY 2018 Line Items - College and Universities

	By Institution/Agency	Page	FY 2017 Total Appropriation	Priority	Institution Specific Initiatives	Total	% of FY 2017 Approp.
1	System-wide Needs		5,064,300				
2	Outcomes Based Funding	7			10,000,000	10,000,000	197.5%
3	Boise State University		92,968,100			5,067,100	5.0%
4	Economic and Workforce Development	11		1	2,625,500		
5	Public Service Initiative	19		2	2,020,000		
6	Occupancy Costs	6		3	421,600		
7	Idaho State University		74,793,900			2,649,800	3.4%
8	Idaho Falls Polytech Initiative	25		1	1,804,200	0	
9	Center for Education Innovation	31		2	737,400	0	
10	Occupancy Costs	6		3	108,200	0	
11	University of Idaho		89,657,300			3,703,600	2.9%
12	Computer Science in Coeur d'Alene Ph. 2	35		1	712,200	0	
13	Library Investment - Carnegie Classification	41		2	1,915,500	0	
14	Occupancy Costs	6		3	1,075,900	0	
15	Lewis-Clark State College		17,062,900			946,200	5.0%
16	Health Professions Education Expansion	47		1	455,400	0	
17	Advising and Career Readiness	53		2	397,700	0	
18	Occupancy Costs	6		3	93,100	0	
			$ 279,546,500		$ 22,366,700	$ 22,366,700	
19							
20	Percentage of FY17 Appropriation		8.0%				

STATE BOARD OF EDUCATION
FY 2018 Line Items - Community Colleges and Agencies

Priority	By Institution/Agency	FY 2017 Appropriation	Page	Priority	FY 2018 Request	Comments
Career-Technical Education		62,057,600			4,866,700	
	State Leadership & Technical Asst.	2,341,700			196,000	
	Horizontal Alignment and Online Courses		73	7	196,000	
	General Programs	13,984,200			375,000	
	Secondary Added Cost Funding		59	2	375,000	
	Skillstack micro-certification platform		77	9		Dedicated Funds: $15,000
	Post-secondary Programs	44,463,900			2,549,300	
	Post-Secondary Capacity Expansion		57	1	2,368,000	
	EITC Human Resource Posiiton		63	4	75,100	
	EITC Finance Director		81	11	106,200	
	Dedicated Programs	325,000			1,496,400	
	Industry Partnership Fund		61	3	1,000,000	
	Secondary Incentive Fund		71	6	496,400	
	Related Services	942,800			250,000	
	Adult Basic Education Expansion		67	5	250,000	
	Tranfser CPM/Health Matters back to DHR		75	8		Reduction in Dedicated/Other Funds: $415,100
	Professional Development Conference		79	10		Dedicated Funds: $250,000
Community Colleges		36,919,000			6,029,100	
	College of Southern Idaho	13,465,800			668,900	
	Center for Education Innovation		85	1	270,000	
	Bridge to Success Summer Bridge		91	2	132,900	
	Eastern Idaho Math & English Instructors		97	3	129,900	
	Embedded Dual Credit Academy Instructors		101	4	136,100	
	North Idaho College	11,785,000			1,726,000	
	Idaho Summer Completion Initiative		105	1	594,900	
	Title IX Coordinator		109	2	89,700	
	Assistive Technology Coordinator		119	3	706,400	
	College and Career Navigators		123	4	335,000	
	College of Western Idaho	11,668,200			3,634,200	
	Student Success		127	1	368,900	
	Equity Funding		129	2	2,260,000	
	Occupancy Costs		6	3	1,005,300	
Agricultural Research/Extension		30,516,700	131	1	1,500,000	Graduate Research Support IAES

STATE BOARD OF EDUCATION
FY 2018 Line Items - Community Colleges and Agencies

Priority	By Institution/Agency	FY 2017 Appropriation	Page	Priority	FY 2018 Request	Comments
Health Education Programs		13,514,000			1,282,400	
	W-I Veterinary Education	1,988,400				No Line Items
	WWAMI Medical Education	4,876,100	137	1	1,282,400	18 month Curriculum
	IDEP	1,610,600				
	Univ. of Utah Med. Ed.	1,466,200				
	Family Medicine Residencies	3,174,900				
	Idaho State University FMR	1,084,900				
	Family Medicine Residency of Idaho	1,530,000				
	Kootenai Health FMR	560,000				
	Boise Internal Medicine Residency	240,000				
	Psychiatry Residency	157,800				
Special Programs		15,430,100			3,201,400	
	Forest Utilization Research	1,268,400			0	
	Geological Survey	1,123,300			0	
	Scholarships and Grants	11,729,200	143	1	3,085,800	Adult Completers Scholarship
	Museum of Natural History	532,700	147	1	115,600	Development for IMNH
	Small Bus. Development Centers	610,100				
	TechHelp	166,400				
State Board of Education		3,477,000			1,905,000	
	Office of the State Board of Education	3,330,500			181,600	
	College to Career Advising Program Mgr		151	1	95,000	
	Qualitative Research Analyst		159	3	86,600	
	Graduate Medical Education Plan		163	4	70,700	
	GEAR UP Scholarships		167	5	1,400,000	
	Charter School Commission	146,500	155	2	71,100	Independent, pre-renewal site visits
Idaho Public Television		3,022,100	169	1	183,100	Educational Outreach
Vocational Rehabilitation		8,336,100			446,300	
	Vocational Rehabilitation	3,913,100	179	2	125,000	Additional Grant and Match Funds
	Extended Employment Services	4,207,200	175	1	214,300	Additional Program Funds
	Council for the Deaf/Hard of Hearing	215,800			107,000	
	Community Outreach		183	3	107,000	
	Increase Spending Authority		189	4		Increase Other funding spending authority
	Total	$ 173,272,600			$ 19,414,000	

STATE BOARD OF EDUCATION
FY 2018 Budget Request
Colleges & Universities
Calculation of Occupancy Costs

Institution/Project	Projected Date of Occupancy	% of Use for Non-Aux. Education	Gross Sq Footage	Non-Aux. Sq Footage	(1) FTE	(2) Custodial Costs Sal & Ben	Custodial Costs Supplies	Custodial Costs Total	(3) Utility Estimate	(4) Maintenance Costs Repl Value	Maintenance Costs Cost@1.5%	(5) Other	Total Occ Cost	% qtrs used in FY18	Revised FY18
BOISE STATE UNIVERSITY															
City Center Plaza *	August-16	100%	49,693	49,693	1.91	69,600	5,000	74,600	87,000	9,800,000	147,000	46,100	354,700	100%	354,700
Research Renovation/Addition	July-15	100%	7,960	7,960	0.31	11,300	800	12,100	13,900	2,196,960	33,000	7,900	66,900	100%	66,900
					2.22	80,900	5,800	86,700	100,900		180,000	54,000	421,600		421,600
IDAHO STATE UNIVERSITY															
Red Hill Building-PAS	October-15	100%	3,700	3,700	0.14	5,100	400	5,500	6,500	355,000	5,300	3,100	20,400	100%	20,400
Meridian - DPT/MOT Labs/Classrooms	September-17	100%	11,040	11,040	0.42	15,300	1,100	16,400	19,300	2,760,800	41,400	10,700	87,800	100%	87,800
					0.56	20,400	1,500	21,900	25,800		46,700	13,800	108,200		108,200
UNIVERSITY OF IDAHO															
Aquaculture Research Institute Lab	April-17	100%	7,500	7,500	0.29	10,600	800	11,400	13,100	1,600,000	24,000	7,100	55,600	100%	55,600
Less FY17 funds received															(41,600)
Integrated Resrch & Innovation Ctr	December-16	100%	70,800	70,800	2.72	99,800	7,100	106,900	123,900	46,600,000	699,000	91,800	1,021,600	100%	1,021,600
Less FY17 funds received															(164,700)
6th Street Executive Residence	January-16	100%	6,300	6,300	0.24	8,800	600	9,400	11,000	478,000	7,200	5,200	32,800	100%	32,800
University House	January-18	100%	6,740	6,740	0.26	9,500	700	10,200	11,800	1,750,000	26,300	6,600	54,900	50%	27,500
McCall MOSS Showerhouse	November-16	100%	1,350	1,350	0.05	1,800	100	1,900	2,400	825,000	12,400	1,700	18,400	100%	18,400
Targhee Hall	July-16	100%	13,471	13,471	0.52	19,100	1,300	20,400	23,600	4,000,000	60,000	13,600	117,600	100%	117,600
AgSci Bldg - new lobby/ADA access *	January-18	100%	1,710	1,710	0.07	2,600	200	2,800	3,000	650,000	9,800	1,800	17,400	50%	8,700
					4.15	152,200	10,800	163,000	188,800		838,700	127,800	1,318,300		1,075,900
LEWIS-CLARK STATE COLLEGE															
Clearwater Hall First Floor Only	July-15	100%	12,790	12,790	0.49	17,800	1,300	19,100	22,400	2,637,249	39,600	12,000	93,100	100%	93,100
COLLEGE OF WESTERN IDAHO															
Academic Building -Nampa	2008	100%	65,600	65,600	2.52	90,500	6,600	97,100	114,800	15,000,000	225,000	62,500	499,400	100%	499,400
Canyon County	2008	100%	75,500	75,500	2.90	104,200	7,600	111,800	132,100	12,900,000	193,500	68,500	505,900	100%	505,900
					5.42	194,700	14,200	208,900	246,900		418,500	131,000	1,005,300		1,005,300

(1) FTE for the first 13,000 gross square footage and in 13,000 GSF increments thereafter, .5 Custodial FTE will be provided.

(2) Salary for custodians will be 80% of Policy for pay grade "E" as prepared by the Division of Human Resources.

Benefit rates as stated in the annual Budget Development Manual; workers comp rates reflect institution's rate for custodial category

Salary CU: $19,845.00 CC: $18,900.00

Benefits

			BSU	ISU	UI	LCSC	CSI	NIC	CWI
FICA									
SSDI salary to $110,100	6.2000%	x salary							
SSHI	1.4500%	x salary							
Unemployment Insurance	0.1500%	x salary							
Life Insurance	0.6750%	x salary							
Retirement: PERSI	11.3200%	x salary							
Workmans Comp		x salary	0.83%	0.94%	2.12%	0.84%	4.81%	4.50%	4.35%
Sick Leave	0.6500%	x salary							
Human Resources			0.554%	0.554%	0.554%	0.554%	0.554%	0.554%	0.554%
	20.4450%	per position	21.8285%	21.9385%	23.1185%	21.8385%	25.8085%	25.4985%	25.3485%
Health Insurance	$12,240.00								
Supplies	0.10								

(3) Annual utility costs will be projected at $1.75 per sq ft 1.75

(4) Building maintenance funds will be based on 1.5% of the construction cost (excluding architectural/engineering fees, site work, movable equipment, etc.) for new buildings or 1.5% of the replacement value for existing buildings.

(5) Other:

IT Maintenance	1.5000	GSF
Security	0.2200	GSF
General Safety	0.0900	GSF
Research & Scientific Safety Costs	0.5000	GSF
Total	2.3100	
Too High - Used 1/3	**0.7700**	**GSF**
Landscape Greenscape	0.0003	CRV
Insurance Costs	0.0005	CRV
Total	**0.00080**	**CRV**

AGENCY: College and Universities	Agency No.:	501	FY 2018 Request
FUNCTION: Systemwide Needs	Function No.:	02	Page _1_ of _3 Pages Original Submission _X_ or
ACTIVITY:	Activity No.:		Revision No. ___

A: Decision Unit No: **12.01**	Title: **Outcomes-Based Funding (OBF)**			Priority Ranking 1 of 4	
DESCRIPTION	**General**	**Dedicated**	**Federal**	**Other**	**Total**
FULL TIME POSITIONS (FTP)	0.00				0.0
PERSONNEL COSTS:					
1. Salaries	0				0
2. Benefits	0				0
3. Group Position Funding					
TOTAL PERSONNEL COSTS:	0				0
OPERATING EXPENDITURES **by summary object:**					
TOTAL OPERATING EXPENDITURES:					
CAPITAL OUTLAY **by summary object:**					
1. PC and workstation	0				0
TOTAL CAPITAL OUTLAY:	0				0
T/B PAYMENTS:	$10,000,000				$10,000,000
LUMP SUM:					
GRAND TOTAL	$10,000,000				$10,000,000

Supports institution/agency and Board strategic plans:

Goal 1: "A Well-Educated Citizenry," Objective C: "Higher Level of Educational Attainment—Increase successful progression through Idaho's educational system."

The Outcomes-Based Funding (OBF) initiative will provide an incentive for colleges and universities to complete academic and technical programs and obtain certificates and degrees which will prepare them for productive careers in the State's workforce.

Performance Measure: Number of Baccalaureate degrees, Associate degrees, and Certificates produced annually.

The OBF approach ties appropriated dollars to program output (as opposed to program "participation," which may not translate into degree completion). Degree/certificate production increases are needed in order for Idaho to meet the Legislature and State Board of Education "60%" educational attainment target.

Description:

The OBF initiative would replace the current "Enrollment Workload Adjustment (EWA)" funding approach used by the State Board of Education, which, when funded, distributed appropriated dollars to institutions based on credit hours delivered, whether or not the students generating those credit hours actually completed their degrees. In consultation with national experts on other states' approaches to Performance-Based and Outcomes-Based funding models, the State Board has developed a simple model to distribute dollars to the institutions as a share of their degree production—both career-technical and academic. The degrees eligible for incentive funding would be limited to baccalaureate (4-year) degrees, associate (2-year) degrees, and certificates of at least one academic year duration. This would focus the incentive funding on outcomes that support the State's "60%" educational attainment goal (preparing Idahoans for a workplace in which 60% of jobs for the 25-34 year old cohort will need at least a certificate of one academic year or more). This initiative replaces a defunct funding mechanism with a clear, simple approach which could, in subsequent years, be built upon to provide additional incentive weight to high priority career fields, underserved populations, or other shorter ("badge" skills") or longer (graduate degrees) with high workforce demand. The requested $10M in ongoing funding would be allocated by the State Board each year, distributed according to degrees produced (payouts based on unduplicated headcount of degree recipients, i.e., only one payout for each graduate who receives multiple degrees/certificates on graduation day). The $10M request in new dollars would be supplemented by additional funds pulled from current baseline budgets of the institutions. Distributions for FY2018 would be made based on actual degree production in the academic year which concluded to July 1, 2017.

Questions:

1. What is being requested and why? What is the agency staffing level for this activity and how much funding by source is in the base? The request is for $10M in ongoing dollars, all from the General Fund. Available dollars would be redistributed each year based on that year's outcomes. No additional staffing is requested for either the Office of the State Board of Education (OSBE) or the institutions.
2. What resources are necessary to implement this request? $10M in Trustee/Benefit funds, to be distributed by the State Board to institutions based on graduation outcomes.
    a. List by position: position titles, pay grades, full or part-time status, benefit eligibility, anticipated dates of hire, and terms of service. Not applicable—no new positions are being requested. The process will be administered by the individuals who currently manage the EWA process, which is being replaced by OBF.

b. Note any existing human resources that will be redirected to this new effort and how existing operations will be impacted. None.

c. List any additional operating funds and capital items needed. Total request is for $10M, all in the form of Trustee/Benefit payments to the institutions.

3. Provide additional detail about the request, including one-time versus ongoing. Include a description of major revenue assumptions, for example, whether there is a new customer base, fee structure changes, or anticipated grant awards. Request is for ongoing funds. The $10M requested appropriation will be supplemented by additional dollars reallocated from current institution baseline budgets.

4. Who is being served by this request and what are the expected impacts of the funding requested? If this request is not funded who and what are impacted? This request is intended to have a positive impact on successful program completion at every public higher education institution in Idaho. The OBF approach will increase the incentive for institutions to enroll, retain, and successfully graduate students ready to assume productive roles in the workforce. If the program is not funded, the system would need to continue to rely upon the EWA methodology, until an effective funding mechanism can be put into place.

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AGENCY: Boise State University	Agency No.: 512	FY 2018 Request
FUNCTION: Instruction, Research, Academic Support	Function No.: 01	Page 1 of 8 Pages
ACTIVITY: New and Expanded Academic and Student Programs	Activity No.:	Original Submission _X_ or Revision No. ___

A: Decision Unit No: **12.01**	Title: **Economic and Workforce Development**			Priority Ranking 1 of 2	
DESCRIPTION	**General**	**Dedicated**	**Federal**	**Other**	**Total**
FULL TIME POSITIONS (FTP)	24.0				24.0
PERSONNEL COSTS:					
1. Salaries	$1,280,100				$1,280,100
2. Benefits	563,900				563,900
3. Group Position Funding	360,400				360,400
TOTAL PERSONNEL COSTS:	$2,204,400				$2,204,400
OPERATING EXPENDITURES **by summary object:**					
1. Travel	$65,000				$65,000
2. Operating	356,200				356,200
TOTAL OPERATING EXPENDITURES:	$421,200				$421,200
CAPITAL OUTLAY **by summary object:**					
TOTAL CAPITAL OUTLAY:					
T/B PAYMENTS:					
LUMP SUM:					
GRAND TOTAL	$2,625,600				$2,625,600

Supports institution/agency and Board strategic plans:

Support for the SBOE Strategic Plan FY2017-2021:

Goal 1. A Well Educated Citizenry

Objective C: Higher Level of Educational Attainment

Performance Measures

- % of Idahoans who have a college degree
- % of new full time degree seeking students who return for the second year
- % of graduates at bachelors and graduate degree levels

Objective D: Quality Education

Objective E: Education to Workforce Alignment

Performance Measures

- Ratio of non-STEM to STEM degrees
- Number of graduates in high demand fields

Goal 2. Innovation & Economic Development

Objective A: Workforce Readiness

Performance Measures

- % of graduates employed 1 and 3 years after graduation
- % of students participating in internships
- % of students participating in undergraduate research

Objective B: Innovation & Creativity

Performance Measures

- Number of startups, patents, disclosures, etc.

Support for BSU's Strategic Plan: *Focus on Effectiveness 2017-2021*

Goal 1: Create a signature, high-quality educational experience for all students

Objectives:

- Provide bountiful opportunities within and across disciplines for experiential learning
- Cultivate intellectual community among students and faculty
- Invest in faculty development and an engaging environment for learning

Performance Measures:

NSSE benchmark of student perception of quality of educational experience. The funding of this request will have substantial impact on our students' educational experience and their ability to think critically and tackle problems innovatively. Further, it will allow us to react quickly to growing workforce demands and to create programs that feed the local and regional economies

Number of students in internships and research

Number of Students in VIP

Goal 2: Facilitate the timely attainment of education goals of our diverse student population

Objectives:

- Bring classes to students using advanced technologies and multiple delivery formats
- Connect students with university services that address individual needs

Performance Measures:

- Number of degree graduates
- Freshman Retention Rate
- Six-year graduation rate
- eCampus

Goal 3: Gain distinction as doctoral research university

Objectives

- Recruit, retain and support highly qualified faculty, staff and students from diverse backgrounds
- Identify and invest in select areas of excellence with the greatest potential for economic, societal and cultural benefit
- Design systems to support and reward interdisciplinary collaboration
-

Performance Measures:

- Number of doctoral graduates
- Number of peer reviewed publications
- Citations of publications by Boise State authors over a five year span
- Total research and development expenditures

Goal 4: Align university programs and activities with community needs

Objectives:

- Include community impact in the creation and assessment of university programs and activities
- Leverage expertise and knowledge within the community to develop mutually beneficial partnerships
- Increase student recruitment, retention and graduation in STEM disciplines

Performance measure:

- Number of graduates in high demand disciplines
- Number of STEM graduates

The funding of this request will have substantial impact on our students' perception of quality of their educational experience. Further, it will allow us to react quickly to growing workforce demands and to create programs that feed the local and regional economies.

Description:

Boise State University is requesting funding that will be used to launch a coordinated set of initiatives that will stimulate Idaho economic and workplace development. From developing and expanding student skill development in order to meet current and emerging workplace needs to expanding Boise State's capacity by training next generation students and faculty in stimulating economic development, this funding will be used on direct delivery of programming and staffing required to deliver these services. Boise State will utilize the College of Innovation and Design as the lead entity across Boise State University to deliver most of the initiatives outlined in this request.

Questions:

1. What is being requested and why? What is the agency staffing level for this activity and how much funding by source is in the base?

   New Games, Interactive Media & Mobile Technology (GIMM) degree program – funding to expand the rapid growth in this new major. One year into this new major and enrollment has skyrocketed to a forecasted 200 students by Fall 2016. This is 2-3 times higher than initial forecasted enrollment and this major has become a differentiation point for both in-state and out-of-state students to choose Boise State. GIMM majors will enter a rapidly growing field with strong hiring demand for their CS and virtual reality programming skills – specifically used by employers for augmented reality and VR employee training (driverless vehicles, healthcare training, PTSD treatment, etc). *Currently serving 65 students per year. Potential growth with funding is anticipated to be 400-500 students per year by Year 4.*

   New Bridge-to-Career (B2C) program expansion – funding to expand the delivery of professional skills to students from any major. With 7 out of 10 Boise State students graduating in fields that do not directly map to a professional job, Bridge-to-Career is a critical set of coursework designed to equip all students at Boise State with basic fluency in a professional skill or industry awareness. *Currently serving 175 students per year. Potential growth with funding is anticipated to be 1,000 students per year by Year 4.*

   Venture College program expansion – funding to expand the delivery of innovation and entrepreneurial skills sets to students from across the University. Boise State believes that every student should have the opportunity to apply ideas learned in the classroom in an experiential setting. Venture College develops the entrepreneurial skill set and mindset many Idaho students need to create tomorrow's companies and become the large employers of tomorrow. *Currently serving 500 students with 25 ventures incubated per year. Potential growth with funding is anticipated to be 1500+ students with 50+ ventures incubated per year by Year 4.*

New Certificate in Professional Ethnography – funding to develop a new certificate that modifies the techniques of anthropology for use in professional settings rather than academic field work. Hundreds of jobs are posted nationally for jobs looking for 'applied insights' and 'design thinking' skills. This new major would be a first of its kind to offer an undergraduate certificate that allows students from any major to add a competency that maps to current employer requirements that are current in demand. *Funding is anticipated to serve 250 students (both online and in-person) by Year 4.*

New Vertically Integrated Projects (VIP) expansion – funding to expand a novel way for students to apply cutting edge research at Boise State to solving real-world problems affecting Idaho and the world. Students form multi-disciplinary teams under the guidance of senior faculty to tackle real-world problems using Boise State research. To expand this from 6 to 16 projects and affect 200 students each year will be transformative to graduating students who can effectively work in teams and apply theory to real-world applied circumstances. *Currently serving 45 students, via 6 VIP courses. Potential growth with funding is anticipated to grow be 150+ students via 20+ VIP courses by Year 2020.*

Launch new Boise State X employer/university educational program – Many Idaho residents are working in lower paying, high turnover, 'front line' jobs for large employers that do not require a college degree for the position being done. However, many of these jobs have few, if any, pathways to a higher paying career without an undergraduate degree. In addition, many of these employees do not have the luxury, life stage, or geographic proximity to attend a university in-person. Funding is requested to launch a new program where Boise State will partner with Idaho employers to offer an employer direct pay option for employees to pursue (or complete) their undergraduate degree. Using our Multi-Disciplinary Studies (MDS) online degree, we believe we can expand access to higher education and offer a pathway to empowerment for many Idaho residents that will lead to career and earnings growth. This program will allow these Idaho residents to gain their undergraduate degrees without having to leave full-time employment. Boise State X can have a large scale workforce development impact due to its use of online learning and the employer partnership model. While employers will pay a large part of the program expenses, funding is requested for a manager and academic coaches to support these employees. *Funding is anticipated to serve 1,000 students in partnership with 5 employers by Year 4.*

New Cooperative Education "COOP" program expansion – funding to expand a new academic course for all Boise State students that will allow students to gain course credit while undertaking a directed experience with an Idaho employer. Unlike an internship, a COOP is an educational experience that includes a partnership between the university, company, and student so that the student learns while they do. It is a pathway for many students in majors that do not map to a professional position to apply and demonstrate their skills while still learning. It often will help students in the Liberal Arts and other areas demonstrate and build confidence in their professional skills. Employers will appreciate the increase in potential talent available and the lower cost of hiring associated with this program. St. Luke's Hospital is our first partner in Fall 2016 in this course. *Currently serving 12 students and 1 employer beginning Fall 2016. Potential growth with funding is anticipated to be 250+ students and 20 employers by Year 4.*

New PhD program in Computing with Computer Science, Cybersecurity, and Computational Science and Engineering Specializations - Boise State University's Computer Science program is rapidly developing into one of the premier programs in the northwest for both teaching and research. From 2009 to 2015, enrollment in the Computer Science program has grown nearly 280%. This expansion has not gone unnoticed by top industry firms.

> *"that the continued success and growth of the CS department is vitally important for HP, and for a multitude of other companies in Idaho, and will have significant, transformative economic impact on the Boise Metro area and Idaho."*
>
> \- Jim Nottingham, Hewlett-Packard's Boise Vice President and General

Utilizing primarily existing faculty resources, this funding will allow Boise State to launch a new PhD Program in Computing with specializations in Cybersecurity, Computer Science, and Computational Science and Engineering. This new PhD program will supply highly skilled graduates and attract / retain talented faculty to collaborate with Idaho industries and agencies. In addition, this program will expand professional development opportunities for Idaho residents working in technology professions.

2. What resources are necessary to implement this request?
   - GIMM
     - 3 new full-time clinical faculty
     - 3 new adjunct faculty in the College of Engineering to address increased teaching load for COEN courses that serve as GIMM prerequisite courses

- Bridge to Career
  - Program Director to manage and grow the program
  - 10 adjunct faculty to teach bridge to career courses
  - Faculty stipends to develop new courses
- Venture College
  - Full-time project director
  - 3 project coordinators
  - Faculty stipends to develop new courses
- Certificate in Professional Ethnography
  - Full-time faculty position
- Boise State X
  - Senior manager
  - 4 academic coaches to support students
- Coop Program
  - 2 full-time clinical faculty
  - 2 full-time project directors
  - 4 full-time project managers
- PhD Computing with Cyber-security, Computer Science, and Computational Science and Engineering specializations
  - 1 new full-time mathematics faculty position
  - 1 new graduate program manager
  - 1 new research administrator / accountant
  - Upgrade the existing Computer Science chair to a 12 month position
  - Upgrade a faculty position to a 12 month PhD Program Coordinator
  - Faculty stipend for program coordination due to the inter-disciplinary nature of the program
  - Convert existing Computer Science GAs to 12 month assistantships
  - 6 new GAs

a. Note any existing human resources that will be redirected to this new effort and how existing operations will be impacted.

   The budget request is for new programs and the expansion of existing programs. Existing operations will not be impacted. With the exception of a new full-time faculty position in Mathematics, the PhD program in Computing will utilize existing faculty lines.

b. List any additional operating funds and capital items needed.

   - Travel and operating for new positions
   - Funding for new vertically integrated projects
   - Graduate assistant tuition and fee waivers

3. Provide additional detail about the request, including one-time versus ongoing. Include a description of major revenue assumptions, for example, whether there is a new customer base, fee structure changes, or anticipated grant awards.

   All requests are for ongoing funds. It is anticipated that both private contributions and research grants will supplement the funding of many of these programs.

4. Who is being served by this request and what are the expected impacts of the funding requested? If this request is not funded who and what are impacted?

   This requests serves Boise State current and future students, Idaho employers, and the State through increased tax revenue as a result of economic development.

AGENCY: Boise State University	Agency No.: 512	FY 2018 Request
FUNCTION: Instruction, Public Service	Function No.: 01	Page 1 of 5 Pages
ACTIVITY: Expanded Academic and Public Service Programs	Activity No.:	Original Submission _X_ or Revision No. ___

A: Decision Unit No: **12.01** Title: **Public Service Initiative** Priority Ranking 2 of 2

DESCRIPTION	**General**	**Dedicated**	**Federal**	**Other**	**Total**
FULL TIME POSITIONS (FTP)	11.00				11.00
PERSONNEL COSTS:					
1. Salaries	$1,254,900				$1,254,900
2. Benefits	399,500				399,500
3. Group Position Funding	205,000				205,000
TOTAL PERSONNEL COSTS:	$1,859,400				$1,859,400
OPERATING EXPENDITURES **by summary object:**					
1. Travel	$27,500				$27,500
2. Operating	133,100				133,100
TOTAL OPERATING EXPENDITURES:	$160,600				$160,600
CAPITAL OUTLAY **by summary object:**					
TOTAL CAPITAL OUTLAY:					
T/B PAYMENTS:					
LUMP SUM:					
GRAND TOTAL	$2,020,000				$2,020,000

Supports institution/agency and Board strategic plans:

Support for the SBOE Strategic Plan FY2017-2021:

Goal 1. A Well Educated Citizenry

Objective C: Higher Level of Educational Attainment

Performance Measures

- % of Idahoans who have a college degree
- % of new full time degree seeking students who return for the second year
- % of graduates at bachelors and graduate degree levels

Objective D: Quality Education

Objective E: Education to Workforce Alignment

Performance Measures

- Ratio of non-STEM to STEM degrees
- Number of graduates in high demand fields

Goal 2. Innovation & Economic Development

Objective A: Workforce Readiness

Performance Measures

- % of graduates employed 1 and 3 years after graduation
- % of students participating in internships
- % of students participating in undergraduate research

Objective B: Innovation & Creativity – increase creation and development of new ideas and solutions that benefit society

<u>Support for BSU's Strategic Plan: *Focus on Effectiveness 2017-2021*</u>

Goal 1: Create a signature, high-quality educational experience for all students

Objectives:

- Provide bountiful opportunities within and across disciplines for experiential learning
- Cultivate intellectual community among students and faculty
- Facilitate respect for the diversity of human cultures, institutions, and experiences in curricular and co-curricular education
- Invest in faculty development and an engaging environment for learning

Performance Measures:

NSSE benchmark of student perception of quality of educational experience. The funding of this request will have substantial impact on our students' educational experience and their ability to think critically and tackle problems innovatively. Further, it will allow us to react quickly to growing workforce demands and to create programs that feed the local and regional economies

Number of students in internships and research

Goal 2: Facilitate the timely attainment of education goals of our diverse student population

Objectives:

- Bring classes to students using advanced technologies and multiple delivery formats
- Connect students with university services that address individual needs

Performance Measures:

- Number of degree graduates
- Freshman Retention Rate
- Six-year graduation rate
- eCampus

Goal 3: Gain distinction as doctoral research university

Objectives

- Recruit, retain and support highly qualified faculty, staff and students from diverse backgrounds
- Identify and invest in select areas of excellence with the greatest potential for economic, societal and cultural benefit
- Design systems to support and reward interdisciplinary collaboration

Performance Measures:

- Number of doctoral graduates
- Number of peer reviewed publications
- Citations of publications by Boise State authors over a five year span
- Total research and development expenditures

Goal 4: Align university programs and activities with community needs

Objectives:

- Include community impact in the creation and assessment of university programs and activities
- Leverage expertise and knowledge within the community to develop mutually beneficial partnerships
- Increase student recruitment, retention and graduation in STEM disciplines

Performance measure:

- Number of graduates in high demand disciplines
- Number of STEM graduates

Description:

The School of Public Service was founded in 2015 to inspire and equip students to be innovative, principled, and effective public service leaders, promote meaningful community engagement and civil discourse, and serve as an objective and unbiased resource for citizens and decision-makers. The School was designed to rethink and redevelop teaching, learning, and research to ensure that Idaho students, businesses, and taxpayers get the most value out of their investments in higher education.

Future leaders in public service, whether they are employed within the private, non-profit, or public sectors, or more likely, travel across the three paths during the course of their careers, require interdisciplinary knowledge and a combination of higher-order hard and soft skills. Boise State graduates from the School of Public Service will be “systems leaders” well versed in leadership, management, collaborative, systems thing, user-centered design, analytics, communications, and ethics. To that end, the School of Public Service has been tearing down institutional silos, developing new interdisciplinary academic programs, explicitly integrating skills development into the curriculum, and employing high impact educational practices, including experiential learning programs, that enhance student success.

In addition, the School was designed to facilitate applied research and serve Idaho communities searching for innovative solutions to the seemingly intractable challenges they face. To that end, the School has revised its tenure and promotion guidelines to emphasize applied research and public engagement. The School has embraced and reinvigorated the University’s historical commitment to public service research by employing faculty and students, from the undergraduate level through the new Ph.D. program in Public Policy and Administration to work in concert with local communities working on downtown revitalization, planning, workforce housing, transportation, and other projects.

Questions:

1. What is being requested and why? What is the agency staffing level for this activity and how much funding by source is in the base?

This proposed line item is designed to advance two distinct yet interconnected outcomes.

First, funding will be used to enhance student learning at the undergraduate and graduate levels. The integration of new faculty lines will facilitate the implementation of new interdisciplinary academic programs and improve retention and graduation rates for students pursuing careers in public service at the undergraduate level while opening new functional tracks for students pursuing the Ph.D. In addition, funding will support student participation in experiential programs that directly enhance skill development, and will increase opportunities for students to engage in applied and vertically integrated research projects that engage students from the undergraduate level through the Ph.D.

Second, line item funding will enable positive community outcomes. Funding for Boise State’s Applied Policy Institute will enhance local government planning and economic development capacity by providing credible research and evaluation studies, professional training and technical assistance, and convening seminars, colloquia, and public events to promote constructive dialogue and thoughtful deliberation on public issues in Idaho. The Applied Policy Institute conducts public policy and demographic research, publishes economic forecasts and economic impact studies, undertakes public opinion survey research, offers dispute resolution resources and provides leadership development and technical assistance to localities. Additionally, funding will help make the nationally-ranked and accredited Masters of Public Administration program more accessible to Idaho communities by implementing executive MPA and on-line MPA programs. Finally, funding will increase data analysis capacity on campus by supporting a public service data center and research lab.

2. What resources are necessary to implement this request?

   - Eight new faculty lines in the School of Public Service: economics, demography, public finance, fiscal policy, health policy, education policy, environmental policy, dispute resolution, including administrative and research budgets.
   - Two administrative leadership lines in Applied Policy Institute
   - Two professional staff positions in Applied Policy Institute
   - Twelve graduate Assistantships in Masters and PhD program
   - Fifteen faculty research fellowships
   - Two distinguished visiting scholar lines
   - Fellowships for experiential education and study away programs
   - Public Service Data Center Lab Manager

3. Provide additional detail about the request, including one-time versus ongoing. Include a description of major revenue assumptions, for example, whether there is a new customer base, fee structure changes, or anticipated grant awards.

   All requested funds are ongoing. If fully funded, Boise State will construct a Public Service Data Center and Research Center to support the initiative.

4. Who is being served by this request and what are the expected impacts of the funding requested? If this request is not funded who and what are impacted?

   This request serves the communities of Idaho and all Idahoans.

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AGENCY: Idaho State University	Agency No.:	510	FY 2018 Request
FUNCTION: General Education	Function No.:	03	Page 1 of 5 Pages
ACTIVITY: Idaho Falls Polytech Initiative	Activity No.:		Original Submission _X_ or Revision No. ___

A: Decision Unit No: **12.01**	Title: **Idaho Falls Polytech Initiative**			Priority Ranking 1 of 2	
DESCRIPTION	**General**	**Dedicated**	**Federal**	**Other**	**Total**
FULL TIME POSITIONS (FTP)	13.00				13.00
PERSONNEL COSTS:					
1. Salaries	$1,000,000				$1,000,000
2. Benefits	365,200				365,200
3. Group Position Funding					
TOTAL PERSONNEL COSTS:	$1,365,200				$1,365,200
OPERATING EXPENDITURES **by summary object:**					
1. Travel	$33,000				$33,000
2. Materials/Supplies	122,000				122,000
TOTAL OPERATING EXPENDITURES:	$155,000				$155,000
CAPITAL OUTLAY **by summary object:**					
1. Equipment/Instrumentation	$200,000				$200,000
2. PC and workstation	44,000				44,000
3. DL Classroom Upgrades	40,000				40,000
TOTAL CAPITAL OUTLAY:	$284,000				$284,000
T/B PAYMENTS:					
LUMP SUM:					
GRAND TOTAL	$1,804,200				$1,804,200

Supports Institution/Agency and Board Strategic Plans:

ISU Core Theme 2: ACCESS AND OPPORTUNITY

Idaho State University provides diverse opportunities for students with a broad range of educational preparation and backgrounds to enter the University and climb the curricular ladder so that they may reach their intellectual potential and achieve their educational goals.

Description

To improve Access and Opportunity for students in Idaho Falls, ISU plans to locate a multidisciplinary cluster of faculty who, in collaboration with sister institution partners, will reside in Idaho Falls with expertise in energy. As Bonneville County works toward the conversion of Eastern Idaho Technical College to a community college, ISU's current role will change from primarily lower division general education offerings to providing bachelor and graduate degrees to the Upper Snake River Valley. The university has just completed a DPW construction project where just over ten thousand square feet of space has been renovated to include twenty faculty offices, two state of the art conference rooms and four state of the art classrooms as well as flexible student/faculty collaborative space. In order to be successful ISU will need to hire approximately fifteen new faculty members from a variety of disciplines but who have a common interest in energy related research. As would be expected, roughly half of the new faculty will be from science and engineering disciplines, however, the other half will be from the colleges of Arts and Letters, Business and Education. To illustrate the concept, a Political Science and/or History professor may have expertise in energy or environmental policy or the impact of energy on history, an English professor could have expertise in the communication of science to the general public. Additionally, Education professors may have expertise in Science Technology Engineering and Math (STEM), Business professors in energy economics, Informatics Professors may work on energy analytics, etc. This cluster of faculty, from disparate fields, with very specialized expertise, will make it possible to offer a wide variety of programs spanning Science and Engineering, the Liberal Arts, Business and Education. In addition, they will be unequally positioned to secure extramural funding from sources such as the National Science Foundation (NSF) and the Department of Energy (DOE) as well as other national and regional funding sources. Finally, it is expected that while meeting the educational needs of the Idaho Falls region, these faculty will be a resource to the Idaho National Laboratory and will be a driving force in the attraction of new high tech energy related industries to the region.

Performance Measure

Over the past fifteen years, ISU has had an enrollment of over 2,000 students/semester where approximately ¾ of the credit hour generation resulted from lower division general education courses. The goal is to maintain ISU's credit hour generation in Idaho Falls by increasing upper division and graduate offerings in order to transition from a primarily lower division curriculum to upper division and graduate. This strategic change will position ISU to accept community college transfer students as demand for bachelor and graduate programs increases resulting from community college graduates.

Questions:

1. What is being requested and why? What is the agency staffing level for this activity and how much funding by source is in the base?

   Nine faculty positions and four support staff positions are being requested to support the expansion of upper division/graduate courses in Idaho Falls by professors with research interests in Energy and the Environment. A polytechnic institution is recommended for Idaho Falls by the LINE (Leadership in Nuclear Energy) Commission in order to ensure that INL (Idaho National Laboratory) maintains its status as DOE's (Department of Energy) lead laboratory for nuclear energy in the United States.

2. What resources are necessary to implement this request?

   a. List by position: position titles, pay grades, full or part-time status, benefit eligibility, anticipated dates of hire, and terms of service.

      Attached Spreadsheet of Positions

      Total Personnel Costs: $1,365,200

   b. Note any existing human resources that will be redirected to this new effort and how existing operations will be impacted.

      This line item request is for new faculty positions and support personnel. There is potential for existing staff in ISU's Pocatello location to provide partial support to efforts at the Idaho Falls location although none have been identified. The upgrade to the Distance Learning Labs would promote opportunity in surrounding areas to the specialized features of the Polytech Initiative.

   c. List any additional operating funds and capital items needed.

      A one-time request for additional operating funds and capital outlay will be required during the first year to support supplying the new offices with essential items, purchasing computers and office equipment for the new faculty and staff, assisting with travel funds, and providing lab equipment/instrumentation tools to support instruction in the expanded program.

One-Time Request for Operating Expenses

Travel ($3,000/11 Positions, 9 faculty & 2 staff)	$ 33,000
Materials/Supplies	$122,000

One-Time Request for Capital Outlay

PC and Workstations ($4,000/11 Positions)	$ 44,000

Equipment/Instrumentation	$200,000
(Specialized equipment needed for Science/Engineering)	
Distance Learning Classroom Upgrades	$ 40,000
Total Request for One-Time Operating	
Expenses and Capital Outlay:	**$439,000**

3. Provide additional detail about the request, including one-time versus ongoing. Include a description of major revenue assumptions, for example, whether there is a new customer base, fee structure changes, or anticipated grant awards.

   The salaries for 13 positions will be ongoing. The one-time request for operating expenses and capital outlay will support the first year of the expansion. The opportunities for increasing faculty research productivity and success in awarded grants improves with the new Polytech initiative and related specialization.

4. Who is being served by this request and what are the expected impacts of the funding requested? If this request is not funded who and what are impacted?

   INL is one of the largest employers in Southeast Idaho, with close proximity to Idaho Falls (a prime location for the Polytechnic Institute). In order to maintain INL's status as the lead laboratory for nuclear energy, it is critical that ISU service its needs in the Science and Engineering fields and provide opportunities to expand research with talented faculty.

12.01 Line Item

Idaho Falls Polytech Initiative

Priority	Position	FTE	Salary	Benefits	PC Total	Travel	Operating	CO	Total	
1	Faculty-Computational Scientist	1.00	85,000	29,654	114,654	3,000	2,000	4,000	123,654	
	Faculty-Energy Economist	1.00	65,000	25,557	90,557	3,000	2,000	4,000	99,557	
	Faculty-Informatics	1.00	100,000	32,727	132,727	3,000	2,000	4,000	141,727	
	Faculty-History	1.00	55,000	23,508	78,508	3,000	2,000	4,000	87,508	
	Faculty-Political Scientist	1.00	55,000	23,508	78,508	3,000	2,000	4,000	87,508	
	Faculty-Mechanical Engineering	1.00	85,000	29,654	114,654	3,000	2,000	4,000	123,654	
	Faculty-Radio Chemist	1.00	65,000	25,557	90,557	3,000	2,000	4,000	99,557	
	Faculty-Experimental Psychology	1.00	65,000	25,557	90,557	3,000	2,000	4,000	99,557	
	Faculty-Business/Health Care Admin	1.00	75,000	27,605	102,605	3,000	2,000	4,000	111,605	
	Management Assistant	1.00	45,000	21,813	66,813	3,000	2,000	4,000	75,813	
	Office Specialist	1.00	35,000	19,686	54,686	3,000	2,000	4,000	63,686	
	Distance Learning Operator	1.00	35,000	19,686	54,686				54,686	
	Distance Learning Operator	1.00	35,000	19,686	54,686				54,686	
	Irregular Salaries/Temp Faculty		200,000	40,974	240,974				240,974	
	2 Classroom DL Upgrades							40,000	40,000	
	Equipment/Instrumentation							200,000	200,000	
	Laboratory Materials/Supplies						100,000		100,000	
		13.00	1,000,000	365,169	1,365,169	33,000	122,000	284,000	1,804,169	1,804,169
	Total	**13.00**	**1,000,000**	**365,169**	**1,365,169**	**33,000**	**122,000**	**284,000**	**1,804,169**	1,804,169
										284,000 CO/OT
										1,520,169 ongoing
										155,000 OE
										1,365,169 PC

Phased Option, If Necessary

	Phase I	Priority	Phase II	Priority	
5 Faculty Positions	494,954	1	398,372	1	4 Faculty Positions
Travel	18,000	2	15,000	2	Travel
Mgmt Assistant	66,813	3	54,686	3	Office Specialist
DL Operator	54,686	4	54,686	4	DL Operator
Irregular Salaries	120,487	5	120,486	5	Irregular Salaries
Computers & M/S	36,000	6	30,000	6	Computers & M/S
1st Classroom DL Upgrade	20,000	7	20,000	7	2nd Classroom DL Upgrade
Equipment/Instrumentation	100,000	8	100,000	8	Equipment/Instrumentation
Laboratory M/S	50,000	9	50,000	9	Laboratory M/S
	960,940		843,229		

Polytechnic Institute-Vision Statement

A Polytechnic Institute as proposed by ISU is an overarching structure that will allow Idaho's higher education institutions, which are members of CAES (Center for Advanced Energy Studies), to locate faculty in Idaho Falls and offer certificate and degree programs either as a single institution or jointly with other member institutions. The institute is responsive to the recommendations of the LINE (Leadership in Nuclear Energy) Commission where a polytechnic institution is recommended for Idaho Falls in order to insure that INL (Idaho National Laboratory) maintains its status as DOE's (Department of Energy) lead laboratory for nuclear energy in the United States.

The faculty members located in Idaho Falls will form a cluster of multidisciplinary professors that have research interests related to energy. Naturally, it is expected that a significant number of faculty would come from science and engineering, however, liberal arts, business and education faculty will also be hired who have expertise related to energy and the environment. For example, a Political Science professor may have expertise in energy policy and/or environmental policy, or an English professor with expertise in the communication of science and engineering to the general public. Education professors with expertise in STEM (Science Technology Engineering and Math), an Economics professor with expertise in the economics of energy etc. are all expected. This cluster of faculty, with very specialized expertise, will make it possible to offer a number of programs spanning Science and Engineering, the Liberal Arts, Business and Education.

With respect to research and economic development, this talented cluster of faculty members will be uniquely qualified to seek extramural research funding from national agencies at a time when funding agencies are interested in multidisciplinary projects and research teams. The close proximity between faculty members with such varied expertise will generate unique research ideas where science and engineering concepts are blended with policy, economics, and education. In addition, competitive funding potential will be enhanced as agencies look favorably on proposals from multiple disciplines and as well as multiple institutions. Finally, the close proximity to INL will allow for research collaboration outside the academy with lab scientists as well as industry partners.

Idaho State University will be the managing institution for the Polytechnic Institute consistent with its current role for University Place, which includes CAES. An academic governance structure that handles the intricacies of multiple institutions offering degrees, both independently and collaboratively, will be developed as institutions identify programs to deliver through the overarching structure of the Polytechnic Institute. It is expected that each institution will have representation commensurate with their role, in a fashion that ensures a winning relationship for all involved, including representation from INL and potentially relevant industry.

AGENCY: Idaho State University	Agency No.:	510	FY 2018 Request
FUNCTION: General Education	Function No.:	03	Page 1 of 4 Pages
ACTIVITY: Center for Education Innovation (ISU)	Activity No.:		Original Submission _X_ or Revision No. ___

A: Decision Unit No: **12.02** Title: **CEI Initiative** Priority Ranking 2 of 2

DESCRIPTION	**General**	**Dedicated**	**Federal**	**Other**	**Total**
FULL TIME POSITIONS (FTP)	6.50				6.50
PERSONNEL COSTS:					
1. Salaries	$380,000				$380,000
2. Benefits	157,400				157,400
3. Group Position Funding					
TOTAL PERSONNEL COSTS:	$537,400				$537,400
OPERATING EXPENDITURES **by summary object:**					
1.					
TOTAL OPERATING EXPENDITURES:					
CAPITAL OUTLAY **by summary object:**					
1. Building Design Costs	$200,000				$200,000
TOTAL CAPITAL OUTLAY:	$200,000				$200,000
T/B PAYMENTS:					
LUMP SUM:					
GRAND TOTAL	$737,400				$737,400

Supports institution/agency and Board strategic plans:

Please refer to attached Joint Whitepaper

Performance Measure:

Please refer to attached Joint Whitepaper

Description:

Please refer to attached Joint Whitepaper

Center for Education Innovation

A joint whitepaper and vision statement | College of Southern Idaho | Idaho State University

May 2016

Introduction

Idaho State University and the College of Southern Idaho jointly propose the design, development, and creation of the Center for Education Innovation (CEI), a visionary and collaborative facility and programming venture to be situated on the CSI campus in Twin Falls and jointly operated.

The CEI initiative attempts to address numerous issues in early childhood, elementary, secondary, and higher education in Idaho. Among them:

- Concerns with current state of teacher education in Idaho
- Need for expanded professional development opportunities for teachers at all levels of education
- Need for more research specifically for the benefit of the Idaho education pipeline to benefit the educational systems of Idaho, including the impact of teacher training in early education
- Tremendous challenges in addressing K12 teacher shortages and demands, especially in rural areas
- Addressing and assessing the proposals and initiatives suggested by the Idaho Education Task Force, national best practices, Idaho Business for Education, and other constituents
- Providing research support and facilitation for the K-20 pipeline
- Providing support for alignment of K12 and university curriculum and college readiness

Situating the CEI facility in Twin Falls on the CSI campus is prompted by the growth, demand, and opportunity specific to the Magic Valley region. CSI has been a pioneer with regard to partnerships and greater integration in K12, demonstrated by the growth of concurrent enrollment, collaborative education ventures, transition coordinator implementation, and other initiatives. Idaho State University has a long history with dual enrollment with its Early College Program and has worked closely with school districts on curricular alignment and K12-related research within its Albion Center for Education Innovation. The longstanding presence of ISU on the CSI campus, with emphasis on the ISU College of Education, together with the spirit of collaboration and articulation suggest tremendous opportunity for both growth and success.

The vision includes a focal point for education research, development of innovation in teacher training at all levels, and reform for all of Idaho. It provides a testbed for practice, and an opportunity to significantly ~~revisit and~~ revise the direction, services and support we provide for educator education, training and professional development.

College of Southern Idaho Operational Vision

The College of Southern Idaho proposes the Center for Education Innovation as a current leader in the pursuit of instructional excellence and preparation of teachers ~~in service to~~

serving in Idaho. The CEI facility provides an opportunity to consolidate teaching and learning lab schools in a revolutionary way, in particular at the early childhood and elementary levels. The operation supports our CSI's Core Themes of Community Success and Student Success by advancing and applying research in a controlled setting, while providing a local pathway to baccalaureate and graduate education.

Various existing and planned programs, services, and operations would or could be housed in the facility:

- CSI Center for Innovation and Teaching Excellence
- CSI Education Department
    - CSI Early Childhood Education Program (including existing labs/lab schools)
    - Transfer education programs
    - Paraprofessional training programs
    - Teacher professional development, continuing education operations
- Rural Education Resource Center
- Southern Idaho P20 Teaching Excellence Initiative
- CSI Higher Education Center (ISU/BSU/UI)
- South Central Idaho Education Partnership (regional Education Idaho Network)
- Region IV iSTEM
- CSI STEM Resource Center

Idaho State University Operational Vision

The partnership between the CSI and ISU for a Center for Education Innovation (CEI) will increase ISU's potential to recruit, retain, and support professional educators in the Magic Valley and will expand the ability to offer high quality educator preparation and professional development in this area. The CEI aligns with ISU's Core Theme One (Learning and Discovery) by continuing and expanding our ability to deliver effective and high quality academic programs that support educator preparation and professional development in the Magic Valley. The CEI aligns with ISU's Core Theme Two (Access and Opportunity) by expanding our opportunity to recruit potential future teachers in secondary school settings and by ensuring that students have access to critical support functions necessary to be successful throughout their education. The CEI also aligns with ISU Core Theme Four (Community Engagement and Impact) by providing a structure that facilitates partnership creation and collaboration and professional development centers for professional educators in the field.

Various existing programs, services, and operations would or could be housed in the facility:

- ISU College of Education Twin Falls Center
- ISU Twin Falls Office for the Albion Center for Education Innovation
- Region IV TRIO
- Regional Math Resource Center
- ISU Community College Leadership program

A future vision and opportunities

Evolving and future opportunities include:

- Consideration of partnering with Twin Falls School District to create an elementary school as a component of the project and as a lab school
- Expanded education research
- Direct linkage with Idaho SDE and Professional Standards Commission
- Revision and improvement of Idaho Career Technical Education (CTE) programming and continuing education support
- Childhood through college education lab research under one roof with shared resources and faculty
- Active research with regard to "education innovation in action," including expanded K12-postsecondary education partnerships, collaboration, and pilot studies

Moving forward

Initial steps include a joint request from CSI and ISU for planning and design funding in order to fully develop and synchronize the operations, programming, and facility concept. This would culminate in a formal building request by the College of Southern Idaho and Idaho State University to the Permanent Building Council.

Attendant staffing and occupancy cost requests will follow as appropriate.

AGENCY: College & Universities	Agency No.: 510	FY 2018 Request
FUNCTION: University of Idaho	Function No.: 04	Page _1__ of _5 Pages Original Submission _X_ or
ACTIVITY:	Activity No.:	Revision No. ___

A: Decision Unit No: **12.01** Title: **Computer Science in Coeur d'Alene Phase 2** Priority Ranking 1 of 2

DESCRIPTION	General	Dedicated	Federal	Other	Total
FULL TIME POSITIONS (FTP)	2.5				2.5
PERSONNEL COSTS:					
1. Salaries	$235,500				$235,500
2. Benefits	89,700				89,700
3. Group Position Funding	92,000				92,000
TOTAL PERSONNEL COSTS:	$417,200				$417,200
OPERATING EXPENDITURES **by summary object:**					
1. Travel	$2,000				$2,000
2. Operating	8,000				8,000
3. Faculty Start-Up (one-time)	220,000				220,000
TOTAL OPERATING EXPENDITURES:	$230,000				$230,000
CAPITAL OUTLAY **by summary object:**					
1. Capital Outlay	$3,000				$3,000
2. Cyber-Security Laboratory	62,000				62,000
TOTAL CAPITAL OUTLAY:	$65,000				$65,000
T/B PAYMENTS:					
LUMP SUM:					
GRAND TOTAL	$712,200				$712,200

Supports institution/agency and Board strategic plans:

University of Idaho Strategic Plan and Process 2016-2025

Goal 3 (Transform), Objective A: Provide greater access to educational opportunities to meet the evolving needs of society.

Performance indicators: The number of students enrolling in Coeur d' Alene computer science program will be the primary metric. Total number of UI students in Coeur d' Alene will also be tracked as it is expected to increase because of increased awareness of UI presence in the community.

Students in the Coeur d'Alene vicinity will have access to a degree in a high demand career field.

Goal 2 (Engage), Objective C: Engage individuals (alumni, friends, stakeholders and collaborators), businesses, industry, agencies and communities in meaningful and beneficial ways that support the University of Idaho's mission.

Performance indicators: The number of industry participants and number of students involved in the co-op program will be tracked. The program will support a co-op program model of education providing contemporaneous work experience with industry partners as part of the curriculum for earning the Bachelor of Science degree program in Computer Science (BSCS).

We will engage current and new industry partners through creation of internship opportunities, research collaborations, graduate job placement efforts and the innovative cooperative program with regional industry partners.

Idaho State Board of Education FY 2016-2020 Strategic Plan

Goal 1 (A Well Educated Citizenry), Objective E: Education to Workforce Alignment – Deliver relevant education that meets the needs of Idaho and the region.

North Idaho is home to a flourishing technology community. Implementing the BSCS program in the Coeur d'Alene region will better serve local students passionate about the field and the community, allowing them to remain in the Coeur d' Alene vicinity while receiving a meaningful, relevant education that they can parlay into a well-paying job without leaving the state.

Offering the BSCS in the Coeur d'Alene community will support the benchmark ratio by enrolling additional students who previously might not have been able to attend a BSCS program elsewhere.

Performance Measure: Number of enrolled students in this key STEM discipline. Number of graduates in high demand fields as defined by the Idaho Department of Labor.

Augmenting the BSCS program would support this effort to increase the number of graduates in information technology, a field considered to be high demand by the Idaho Department of Labor.

Goal 3 (Effective and Efficient Educational System), Objective C: Alignment and Coordination – Facilitate and promote the articulation and transfer of students throughout the education pipeline (Secondary School, Technical Training, 2yr, 4yr, etc.).

Students who would attend the University of Idaho in Coeur d' Alene (UICDA) BSCS would complete their first two years at North Idaho College, obtaining an Associate's Degree.

Performance Measure: Percent of Idaho community college transfers who graduate from four year institutions.

The UICDA BSCS program would directly contribute to increasing the percentage of students who transfer to four year institutions as it is a component of the program that they start their BSCS at North Idaho College, an Idaho community college.

Idaho SBOE Strategic Plan Current Initiatives:

2. Ensure college and career readiness

8. Strengthen collaborations between education and business/industry partners

10. Develop transfer coordinated admission policies between community colleges and four year institutions to create pathways from 2-year to 4-year institutions.

In addition to supporting goals, objectives, and performance measures of the SBOE Strategic plan, the UICDA BSCS program will support these "current initiatives". Expanding the BSCS program to a full four years in Coeur d' Alene will: assist in ensuring career readiness (initiative 2) through extensive industry exposure and internship opportunities; solidify collaborations with industry partners (initiative 8) through current and new relationships fostered with area businesses, initiating program content consultation, internship opportunities, and research and development partnerships; and support coordinated admission policies that create pathways from 2 to 4-year institutions (initiative 10) through rigorous communication and collaboration between staff and faculty at both North Idaho College and the University of Idaho.

Description:

The goal of this project is to provide talent development and research to support students and industry in northern Idaho in the critical area of computer science. We originally proposed a plan to expand computer science in two phases. Phase 1 is to establish the third year of coursework and Phase 2 is the final year of coursework to allow for an entire four-year BSCS with a critical mass of faculty to support economic development in northern Idaho. This request is the Phase 2 expansion to complete last year's Phase 1 appropriation. As evidenced in other areas of the State and region, a BSCS would be a tremendous advantage for place-bound students in northern Idaho and provide key support to growing businesses in the area. It would greatly enhance the economic development of the region and move Idaho closer to its Complete College Idaho goals.

Currently students can obtain an associates degree in computer science from North Idaho College (NIC). With the Phase 1 appropriation for FY 2017 students are now able to stay in the area and complete their third-year of coursework from UICDA; however students will still need to transfer to the UI in Moscow for their final two semesters of coursework in order to complete their BS degree requirements. Funding this Phase 2 request will enable the UI to expand to a full four year BSCS so that students can graduate as early as May 2018 without having to leave the Coeur d' Alene area. A unique characteristic of this program will be a cooperative (co-op) education track that will make industry-sponsored internships a part of the educational process. The co-op model was originally developed at the University of Cincinnati and has been adopted at many locations across the world over the last 100 years. Additionally, the program, in collaboration with local industry, will be an engine of innovation to support the research and development activities of local technology firms as well long-standing traditional industries, businesses, and government agencies. In this day and age, all industry is dependent on computational expertise. Such a program is just as critical to a competitive economy as are adequate roads, utilities, and other critical infrastructure.

Questions:

1. **What is being requested and why? What is the agency staffing level for this activity and how much funding by source is in the base?**

   This Phase 2 request is for 2.5 FTE positions plus adjunct and TA assistance: one experienced associate professor, one less experienced assistant professor, and converting a 0.5 FTE administrative assistant position to 1.0 FTE. We are also requesting funds to hire adjuncts from the community for four classes each year as well as three graduate teaching assistantships to support coordinated courses between Coeur d' Alene and Moscow. One consequence of supporting a cooperative educational model is that we will need to offer classes more often to account for the internship schedule so that students can graduate in a timely manner. These additional faculty and supporting staff will enable us to seek ABET accreditation which is essential for a viable CS degree program. This request includes equipping laboratories in Coeur d' Alene along with building out videoconferencing capacity in Moscow and Coeur d' Alene to enable delivery of selected critical courses and faculty and industry collaboration. Startup costs for the additional tenure track faculty are also requested. We are also submitting a detailed Notice of Intent (NOI) to the Board of Regents for their approval.

We are requesting this Phase 2 funding to complete our goal of supporting talent development and research in computer science in northern Idaho. There is growing demand for Computer Science BS education in northern Idaho. UI Moscow and NIC Computer Science programs are experiencing ~20% annual growth. In addition, skilled computer scientists are in high demand. The recurring costs are $427,200 annually.

2. What resources are necessary to implement this request?

a. List by position: position titles, pay grades, full or part-time status, benefit eligibility, anticipated dates of hire, and terms of service.

Associate Professor starting spring semester 2018 (note that salary savings from this mid-year hire will go towards funding faculty recruitment and start-up costs)

Assistant Professor starting fall semester 2017.

Administrative Assistant 0.5 FTE in fall 2017 will increase the current 0.5 FTE to a full-time position

b. Note any existing human resources that will be redirected to this new effort and how existing operations will be impacted.

The program is administered by the UI's College of Engineering and Department of Computer Science. We have considerable experience in administering distance programs in Boise and Idaho Falls. The Computer Science program in Coeur d' Alene will be absorbed into the existing structure. The UICDA staff will provide local support for recruiting and student success as well as collaborations with industry. They will also help deploy professional development opportunities for local professionals.

c. List any additional operating funds and capital items needed.

Based on our experiences with distance programs an annual budget of $12,000, $8,000, and $15,000 will be needed for operating, travel, and equipment expenses, respectively. This Phase 2 request adds to the Phase 1 appropriation to obtain this budget need. In addition, we are requesting one-time funding for the cyber-security laboratory and faculty start-up.

3. Provide additional detail about the request, including one-time versus ongoing. Include a description of major revenue assumptions, for example, whether there is a new customer base, fee structure changes, or anticipated grant awards.

The one-time fund request is for startup funds for the new faculty and Computer Security laboratory. The rest of the funding will be on-going annually. As mentioned above there is growing demand for Computer Science BS education in northern Idaho due to the flourishing technology community

4. Who is being served by this request and what are the expected impacts of the funding requested? If this request is not funded who and what are impacted?

The program will provide increased educational opportunities in computer science in northern Idaho. A growing contingent of Computer Science students at North Idaho College will have local access to a BSCS without leaving the area. NIC is engaged with the development team for this program and enthusiastic about cooperating to ensure its success.

The rapidly growing high tech industry in the region includes mostly small and medium sized businesses. These businesses are typically growth-constrained by the lack of trained computer scientists. Failure to establish this program will slow the production of these highly trained professionals which will, in turn, slow industry growth and jeopardize retention of these high wage and high growth potential companies which are critical to building a stronger economy.

5. If this is a high priority item, list reason why unapproved Line Items from the prior year budget request are not prioritized first.

Legislative action provided funding for Phase 1 (establish 3rd year of computer science training in Coeur d'Alene) to be implemented in fall semester of 2016. This Phase 2 request will enable the needed subsequent year of the program to allow northern Idaho students to obtain the BSCS degree without relocation.

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AGENCY: College & Universities	Agency No.:	510	FY 2018 Request
FUNCTION: University of Idaho	Function No.:	04	Page _1__ of _5 Pages Original Submission _X_ or
ACTIVITY:	Activity No.:		Revision No. ___

A: Decision Unit No: **12.02**	Title: **Library Investment in Support of Achieving R1 Carnegie Classification**			Priority Ranking 1 of 1	
DESCRIPTION	**General**	**Dedicated**	**Federal**	**Other**	**Total**
FULL TIME POSITIONS (FTP)	8.25				8.25
PERSONNEL COSTS:					
1. Salaries	$357,900				$357,900
2. Benefits	184,900				184,900
3. Group Position Funding	50,000				50,000
TOTAL PERSONNEL COSTS:	$592,800				$592,800
OPERATING EXPENDITURES **by summary object:**					
1. Travel for Faculty	$7,500				$7,500
2. Memberships	51,500				51,500
3. Travel for Memberships	30,000				30,000
4. Software Licenses	4,000				4,000
5. General Operating	4,500				4,500
TOTAL OPERATING EXPENDITURES:	$97,500				$97,500
CAPITAL OUTLAY **by summary object:**					
1. PC and workstation (OT)	$25,200				$25,200
2. Non-standard inflation	350,000				350,000
3. New journal titles	400,000				400,000
4. Monograph purchases	400,000				400,000
5. Equipment	50,000				50,000
TOTAL CAPITAL OUTLAY:	$1,225,200				$1,225,200
T/B PAYMENTS:					
LUMP SUM:					
GRAND TOTAL	$1,915,500				$1,915,500

Supports institution/agency and Board strategic plans:

State Board of Education Goal 2: Objective B
Increase creation and development of new ideas and solutions that benefit society.

University of Idaho Goal 1: Innovate Objective B
Create, validate and apply knowledge through the co-production of scholarly and creative works by students, staff, faculty and diverse external partners.

Performance Measure: Become a Carnegie R1 institution

These resources are needed to support the faculty and students to build the programs and research expected by Carnegie R1 institutions.

Description:

This proposal enables the Library to provide essential support for the University of Idaho as it expands its research portfolio and aspires to achieve Carnegie Very-High (R1) status. This will be achieved by expanding the Library's capacity to match peer and aspirational peer institutions. This increased capacity will significantly increase support for research and scholarship, student success, and outreach to the larger Idaho community.

Questions:

1. What is being requested and why? What is the agency staffing level for this activity and how much funding by source is in the base?

   We are requesting personnel and operating expenses to enable the Library to provide a suite of services to University students and scholars that advance its research, teaching, and land-grant missions. External peer reviewers note that, while the University of Idaho Library has the distinction of being the largest research library within the state, "within the larger world of research libraries, the University of Idaho Library has failed to measure up."

   Specifically, the Library intends to accomplish several actions under this umbrella:

   - Develop a First Year Experience instruction program (.75 instructor)
   - Build faculty research and curricular support in college liaison program (1 FTE)
   - Support data management, deposit, reuse, and curation (1 FTE)
   - Enable development of a robust institutional repository (1 FTE)
   - Permit safe and secure operation of 24-hour facility (1 FTE)
   - Provide technical support for faculty in processing activities (1 FTE)
   - Address new role of collecting and preserving institutional history (1 FTE)
   - Support innovative learning with primary source materials (1 FTE)
   - Enable ability to communicate with broad academic and library communities (.5 FTE)

   These activities are essential components of today's leading research libraries. Additionally, this support enables the University of Idaho to further grow its outreach to statewide libraries and museums. We currently share our expertise through webinars and workshops; much more statewide outreach could be done with additional support.

2. What resources are necessary to implement this request?

   a. List by position: position titles, pay grades, full or part-time status, benefit eligibility, anticipated dates of hire, and terms of service.

      1. Position: Social Sciences Librarian, Assistant Professor, $50,000; FT/FY, tenure-track, benefit-eligible, date of hire: start AY18
      2. Position: Resident Librarian, Instructor, $35,000, FT/AY, non-tenure track, benefit-eligible, date of hire: start AY18
      3. Position: University archivist, Assistant Professor, $50,000, FT/FY, tenure-track, benefit eligible, date of hire: start AY19
      4. Position: Night supervisor, Circulation, library technician, PG 4 with night differential, $29,120, FT, classified, benefit eligible, date of hire: July 2017
      5. Position: Institutional repository programmer, PG 7, $43,700, FT, classified, benefit eligible, date of hire: July 2017
      6. Position: Metadata Librarian, Assistant Professor, $50,000, FT/FY, tenure-track, benefit eligible, date of hire: start AY18
      7. Position: Archivist for Instruction and Engagement, Assistant Professor, $50,000, FT/FY, tenure-track, benefit eligible, date of hire: start AY19
      8. Position: Data services support, Library technician, PG 4, $28,080, FT, classified benefit eligible, date of hire, July 2017
      9. Position: Marketing/Communication staff, PG?; $22,000, PT/FY, classified, benefit eligible, date of hire, AY18
      10. Student employment: $50,000

   b. Note any existing human resources that will be redirected to this new effort and how existing operations will be impacted.

   c. List any additional operating funds and capital items needed.

      - Operating funds
        - Faculty travel: $7,500
        - Phones, supplies, etc.: $4,500
        - Software licenses: $4,000
        - Memberships and travel
          - Greater Western Library Alliance, $16,000
          - Orbis Cascade Alliance, $20,000
          - HathiTrust, $15,000
          - Coalition for Networked Information, $10,000
          - Research Data Alliance, $5,000
          - Council on Library and Information Resources, $4,645
          - Digital Library Federation, $4,620
          - Scholarly Publishing and Academic Resources Coalition (SPARC), $6,181
      - Capital outlay
        - Office furniture and computers: $25,200
        - Non-standard periodical inflation added to base: $350,000
        - New periodical titles, $400,000

- Monographs: $400,000
- Equipment (e.g., Microfilm reader/printers, scanners): $50,000

3. Provide additional detail about the request, including one-time versus ongoing. Include a description of major revenue assumptions, for example, whether there is a new customer base, fee structure changes, or anticipated grant awards.

   With the exception of the start-up capital outlay for offices and computers, all of these budget requests are on-going investments.

   Investments in Special Collections staff and memberships in appropriate library organizations heightens our ability to seek and secure external funding. The Library has been increasingly active in grantsmanship and several collections offer opportunities for this activity. For example, the Library recently secured a National Endowment for the Humanities grant in partnership with the Latah County Historical Society that will result in the preservation, digitization, and dissemination of unique privately-owned regional history resources.

   Additionally, robust data curation and open access institutional repository infrastructure will increase competitiveness for grants across all of the University. These are areas that many granting agencies, including the National Science Foundation, Department of Defense, and the National Endowment for the Humanities, have deemed to be crucially important. The positions in this proposal are essential to creating and maintaining this infrastructure.

4. Who is being served by this request and what are the expected impacts of the funding requested? If this request is not funded who and what are impacted?

   This request is designed to serve all members of the university community (all disciplines, all types of research) It addresses student support from the beginning of a student's career until the ultimate goal of graduation, thus building graduates who are competent and competitive in today's information-rich world. It supports our researchers, adding depth to emerging disciplines and foci of the University. This proposal also provides support for the University of Idaho's land-grant mission to serve the state. The Library provides special consulting services to all Idaho libraries and shares resources with the same. This investment will provide opportunities for additional student internships and community partnerships, such as has transpired with the Latah County Historical Society, Potlatch, Nampa, and Kendrick-Juliaetta's Heritage Society.

   The various activities represented in this request support the University of Idaho Library's professional obligation to participate in national dialogues about the future directions of libraries and, by extension, raises the state's profile and prestige.

   If unfunded, the University of Idaho will find it difficult to support its goal of becoming a Carnegie R1 institution. If not funded, Idaho would remain as one of the very few states without an adequately funded and staffed research library and this outcome impacts the state in multiple ways; for example, it would ensure that the University of Idaho Library remains adequate for many uses but well short of attaining the stature that would support both the current and aspirational needs of the University. Lack of funding would also keep the ability of the Library to perform essential outreach to Idaho at a minimum despite demonstrated need and demand.

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AGENCY: Lewis-Clark State College	Agency No.: 511	FY 2018 Request
FUNCTION: General Education	Function No.:	Page ___ of __ Pages
ACTIVITY: Health Professions Education Expansion	Activity No.:	Original Submission _X_ or Revision No. ___

A: Decision Unit No: **12.01**	Title: **HEALTH PROFESSIONS EDUCATION EXPANSION**			Priority Ranking 1 of 2	
DESCRIPTION	**General**	**Dedicated**	**Federal**	**Other**	**Total**
FULL TIME POSITIONS (FTP)	6.00				6.0
PERSONNEL COSTS:					
1. Salaries	$295,200				$295,200
2. Benefits	135,200				135,200
3. Group Position Funding					
TOTAL PERSONNEL COSTS:	$430,400				$430,400
OPERATING EXPENDITURES **by summary object:**					
1. Travel	$2,000				$2,000
2. Operating Expense	5,000				5,000
TOTAL OPERATING EXPENDITURES:	$7,000				$7,000
CAPITAL OUTLAY **by summary object:**					
1. PC and workstations (six)	$18,000				$18,000
TOTAL CAPITAL OUTLAY:	$18,000				$18,000
T/B PAYMENTS:					
LUMP SUM:					
GRAND TOTAL	$455,400				$455,400

Supports institution/agency and Board strategic plans: This request supports State Board Goal 1 (Well Educated Citizenry), Objective C (Higher Level of Educational Attainment) by providing highly qualified faculty to deliver high-demand programming and an advisor to support student progression toward degree completion. It also supports Objective E (Education to Workforce Alignment) and LCSC Goal 1 (Sustain and enhance excellence in teaching and learning), Objective 1A (Strengthen courses, programs, and curricula consonant with the mission and core themes of the institution, through the delivery of high quality programs that meet regional and statewide needs).

Performance Measures: Objective C: Percentage of Idahoans (ages 24-35) who have a college degree or certificate requiring one academic year of more of study—benchmark: 60%. Objective E: Numbers of graduates in high demand fields as defined by the Idaho Department of Labor—benchmark: TBD.

Description: This request targets two key health professions areas: Kinesiology and Social Work. The four (4) faculty and two (2) staff positions sought in this line item request support expansion of high performing, high quality programming in high demand areas, as identified in the program prioritization process.

- **Priority 1.** 1.0 FTE Kinesiology Assistant Professor, 12 month contract: The Kinesiology major is in high demand, as evidenced by the growth in Kinesiology majors, tabled below. Graduates in Kinesiology are prepared for advanced study in Physical Therapy (IDOL Hot Job #3), Physician Assistant (IDOL Hot Job #5), and medical school (IDOL Hot Job #15). Additional areas in which Kinesiology graduates find career opportunities include education, therapeutic exercise, geriatric wellness, health and fitness leadership, sports training, coaching, athletic medicine, sports and fitness communication, and commercial fitness. According to the Bureau of Labor Statistics, jobs for Kinesiology graduates in nursing homes, residential care, and other health-oriented facilities are projected to grow 10 percent from 2014 to 2024, faster than the average for all occupations. Addition of this 1.0 FTE position supports admittance of an additional 25 students to the Kinesiology major, and this position will also support expanded summer school course offerings. Total cost of the position including salary, benefits, OE and CO is $102,500.

KINESIOLOGY ENROLLMENT BY MAJOR AND ACADEMIC YEAR

MAJOR	2012-2013	2013-2014	2014-2015	2015-2016
KINESIOLOGY-SECONDARY EDUCATION	24	13	34	22
KINESIOLOGY- EXERCISE SCIENCE/SPORT MEDICINE	64	72	73	32
KINESIOLOGY - HEALTH PROMOTION/PERSONAL TRAINING/WELLNESS COACHING	23	32	32	24
KINESIOLOGY- SPORT ADMINISTRATION	34	31	41	43
KINESIOLOGY - YOUTH SPORTS/RECREATION	1	1	1	1
SPORT ADMINISTRATION	35	43	56	60
EXERCISE SCIENCE (FIRST YEAR AY14-15)	0	0	13	45
	181	192	250	227

- **Priority 2.** 1.0 FTE Kinesiology Assistant Professor, 9 month contract: Same justification as noted above. Addition of this 1.0 FTE position supports admittance of an additional 25 students to the Kinesiology major, and provides expanded course offerings during the traditional academic year. Total cost of position including salary, benefits and capital outlay is $78,100.

- **Priority 3.** 1.0 FTE Health Professions Program Advisor: To maintain strong enrollment or increase enrollments in high demand health-focused programs requires specialized advising and follow-up, particularly for students transferring to LCSC. A dedicated Health Professions Advisor will assist students in choosing the appropriate health profession for their interest and aptitude, evaluate transcripts, and develop a degree completion plan. In the Central Advising Center, advisors carry advising loads of 125+ freshman students. In high demand health-focused programs, faculty advising loads are 35+ students. The addition of a 1.0 FTE, 11-month exempt position supports advising of up to 200 health profession students. Total position cost including salary, benefits, travel and CO is $66,800.

- **Priority 4.** 1.0 FTE Social Work Assistant Professor, nine month contract: There continues to be strong interest in the Social Work major at LCSC, particularly in a delivery format that reaches a broad audience. Social workers are employed in a variety of settings, including mental health clinics, schools, child welfare and human service agencies, hospitals, settlement houses, community development corporations, and private practices. Driven by the increased demand for healthcare and social services, jobs in social work are expected to increase 12% over the next decade. LCSC Social Work graduates are prepared for advanced study in programs such as the MSW offered by Boise State University. Addition of this position allows for program expansion of up to 25 students, while maintaining compliance with the Council on Social Work Education requirement of a 25 to 1 student-to-faculty ratio. An additional faculty position also provides an opportunity to deliver portions of the program in an online format (hybrid program) to better meet the needs of distant students and working professionals. This nine-month position provides expanded course offering and clinical supervision during the traditional academic year. Total position cost including salary, benefits, OE and CO is $78,100.

- **Priority 5.** 1.0 FTE Social Work Assistant Professor, nine-month contract: Same justification as noted above. Addition of a 1.0 FTE Assistant Professor supports admittance of up to 25 new students to the Social Work major. This nine-month position provides expanded course offerings and clinical supervision during the traditional academic year. Salary, benefits, and capital outlay total: $75,600.

- **Priority 6.** 1.0 FTE Administrative Assistant: Program expansion, particularly in the Kinesiology major, will require additional administrative assistant support. Salary, benefits, and CO total: $54,600.

Questions:

1. What is being requested and why? What is the agency staffing level for this activity and how much funding by source is in the base?

   Position and support funds are detailed and prioritized above. No base funding currently exists for expansion of programming.

2. What resources are necessary to implement this request?

   a. List by position: position titles, pay grades, full or part-time status, benefit eligibility, anticipated dates of hire, and terms of service.

      See position detail, above. Five positions are 1.0 FTE, benefit-eligible positions, with anticipated hire dates of August 2017; the Program Advisor is an 11-month, benefit eligible position, with the same anticipated hire date.

   b. Note any existing human resources that will be redirected to this new effort and how existing operations will be impacted.

      Existing operations will be positively impacted through reduced advising loads and improved faculty-to-student ratios.

   c. List any additional operating funds and capital items needed.

      Operating funds of $5,000 ($2,500 each, for both Kinesiology and Social Work) will support the purchase of instructional materials and course development. An additional $2,500 is requested for travel expenses for the Program Advisor position. Capital Outlay includes a computer workstation for each of the six requested positions ($3,000 each; $18,000 total).

3. Provide additional detail about the request, including one-time versus ongoing. Include a description of major revenue assumptions, for example, whether there is a new customer base, fee structure changes, or anticipated grant awards.

   With the exception of Capital Outlay, the request is for ongoing State General Funds. This proposal is scalable: Option 1 provides the resources necessary to expand both Kinesiology and Social Work for a cost of $455,400. Option 2 provides the resources to significantly expand our priority program (Kinesiology) through the addition of two faculty and two support staff (Health Program Advisor and Administrative Assistant), for a cost of $301,700.

4. Who is being served by this request and what are the expected impacts of the funding requested? If this request is not funded who and what are impacted?

   Two in-demand programs will be expanded by the addition of four (4) faculty positions and one (1) program advisor. These positions will sustain the upward trajectory in program enrollment and meet the demand for flexible (hybrid) programming.

If the request for faculty lines is not funded, we will seek qualified adjuncts when possible, and grow the Kinesiology program in small increments. If not funding is forthcoming, there will be no Social Work program expansion due to accreditation driven student-to-faculty ratios.

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AGENCY: Lewis-Clark State College	Agency No.: 511	FY 2018 Request
FUNCTION: General Education	Function No.:	Page ___ of __ Pages
ACTIVITY: Advising & Career Readiness	Activity No.:	Original Submission _X_ or Revision No. ___

A: Decision Unit No: **12.02**	Title: **ADVISING & CAREER READINESS**			Priority Ranking 2 of 2	
DESCRIPTION	**General**	**Dedicated**	**Federal**	**Other**	**Total**
FULL TIME POSITIONS (FTP)	4.00				4.0
PERSONNEL COSTS:					
1. Salaries	$157,000				$157,000
2. Benefits	81,500				81,500
3. Group Position Funding					
TOTAL PERSONNEL COSTS:	$238,500				$238,500
OPERATING EXPENDITURES **by summary object:**					
1. Travel	$2,500				$2,500
2. Operating Expense	9,700				12,200
3. Scholarships	135,000				135,000
TOTAL OPERATING EXPENDITURES:	$147,200				$147,200
CAPITAL OUTLAY **by summary object:**					
1. PC and workstations (four)	$12,000				$12,000
TOTAL CAPITAL OUTLAY:	$12,000				$12,000
T/B PAYMENTS:					
LUMP SUM:					
GRAND TOTAL	$397,700				$397,700

Supports institution/agency and Board strategic plans: This request supports State Board Goal 1 (Well Educated Citizenry), Objective A (Access), Objective B (Adult Learner Reintegration) and Objective C (Higher Level of Educational Attainment), as well as LCSC Goal 2 (Optimize student enrollment and promote student success), Objective 2B (Retain and graduate a diverse student body) and LCSC Goal 3 (Strengthen and expand collaborative relationships and partnerships), Objective 3A (Increase volunteer, internship, and career placement opportunities).

Performance Measures: Objective A: Increase the percentage of students whose financial need was fully met by 15% over 5 years; 85% graduating student debt of weighted peers; Objective B and C: Percentage of Idahoans (ages 24-35) who have a college degree or certificate requiring one academic year or more of study—benchmark: 60%. Objective E: Ratio of non-STEM to STEM baccalaureate degrees conferred in STEM fields.

Description: Lewis-Clark State College requests $397,700 in on-going funds to support student success through specialized advising, career counseling and guidance, and expansion of the Work Scholars program. These requests support the State Board of Education and institutional strategic plans and will serve diverse groups of students (i.e., veterans, Coeur d'Alene-based students, and Work Scholars), as well as the general student population at Lewis-Clark State College.

- **Priority 1.** 1.0 FTE Veteran's Services Coordinator/Advisor: Currently, the College has no staff specifically and exclusively dedicated to supporting veterans. Veteran students comprise a significant part of the College's FTE (4.5% in fall 2015), and many veterans require services beyond just educational benefits processing. Greater scrutiny is required during academic advising process due to the fact that educational benefits for veterans are strict and allow very little latitude in student course scheduling. An advising error could result in veterans having to repay portions of their benefits and/or increase loan debt. LCSC has also seen an increase in incidents of post-traumatic stress disorder among its veteran student population. Services for these students must be brokered among college and community resources, requiring a significant amount of staff time. Increased staff support would also put the College in a position to compete for grant programs earmarked for the veteran population. Total cost of the position including salary, benefits, OE and CO is $72,100.

- **Priority 2.** 1.0 FTE Career Counselor: The College is continuing to serve freshmen with a centralized advising program wherein students are required to develop a degree completion plan, build class schedules, and develop a draft career plan which evolves throughout their undergraduate experiences. Centralized advising has served over 2,500 students since the program started and serves approximately 800 students at present; there is little time for staff to spend on ongoing career advising. Idaho Business for Education, Idaho Department of Labor, legislators, and State Board of Education members have all challenged higher education to produce students who are "career ready." Increasing career counseling staff will enable the College to expand opportunities for students to explore career options, evaluate their choice of academic major (which also reduces length of time to degree), and broker more opportunities for students to pursue internships and other work experiences. Furthermore, expansion of career-oriented programming will enable the College to partner with regional school districts as they develop and improve their career guidance and college planning programs, per funding provided by the legislature. Total position cost including salary, benefits, and CO is $61,100.

- **Priority 3.** 1.0 FTE Career Counselor: Same justification as noted above, except that operating expense supporting this position is also requested. Total position cost including salary, benefits, OE and CO is $70,800.

- **Priority 4.** 1.0 FTE Student Services Generalist: As LCSC pursues a partnership with the University of Idaho and North Idaho College to develop a collaborative use facility in Coeur d'Alene, it is poised to expand services to students who complete bachelor's degrees in North Idaho. The College's enrollment in Coeur d'Alene totaled 468 students in the fall of 2015. A Student Services Generalist would supplement existing personnel at the collaborative use facility, and will focus on academic advising, financial aid, and enrollment counseling. Salary, benefits, and capital outlay total: $58,700.

- **Priority 5.** Expansion of the Work Scholars program: The LCSC Work Scholars model is, in its inaugural year, validating the Work College concept as a means for Idaho students and families of limited economic means to gain access to higher education. There is significant demand for this program. The program was initially funded at a level designed to serve 20 students; through cost savings, we have been able to accommodate 22, but the program is currently running at capacity, both in terms of scholarships and worksites. The statistics supporting the success of the Work Scholars program are compelling: 90% of our first generation and minority college students were retained semester-to-semester in our first year. Seventy-seven percent of our scholars are first generation college students, and 13% are American Indian, Hispanic or Latino. The average Work Scholar GPA is 3.40, and through inclusion in the Work Scholars program, 80% have reported that they were able to reduce or eliminate their reliance on student loans. We are requesting funding to increase the capacity of this program to from 20 to 38 slots in FY18. Operating expense total: $135,000.

Questions:

1. What is being requested and why? What is the agency staffing level for this activity and how much funding by source is in the base?

   Position and support funds are detailed and prioritized above. Currently, many activities are conducted as additional duties by existing staff. The College employs one staff member in the Financial Aid Office who processes veteran's educational benefits as part of her job. We employ a three-quarter time staff member who is tasked specifically with career counseling, and other staff members provide career guidance as part of their advising duties. If the requested funding is provided, we will establish a dedicated Career Center, staffed with two career counselors, the existing three-quarter time employee, and a dedicated director, whose current position will be repurposed to lead career education/guidance efforts.

2. What resources are necessary to implement this request?

   a. List by position: position titles, pay grades, full or part-time status, benefit eligibility, anticipated dates of hire, and terms of service.

      See position detail, above.

   b. Note any existing human resources that will be redirected to this new effort and how existing operations will be impacted.

      See question 1, above.

   c. List any additional operating funds and capital items needed.

Capital Outlay includes a computer workstation for each of the four requested positions ($3,000 each; $12,000 total). In addition, $9,700 is requested as ongoing operating expense for career counseling, and $2,500 travel funding for the Veteran's Coordinator.

3. Provide additional detail about the request, including one-time versus ongoing. Include a description of major revenue assumptions, for example, whether there is a new customer base, fee structure changes, or anticipated grant awards.

   With the exception of Capital Outlay, the request is for ongoing State General Funds. This proposal is scalable in four ways. Option 1 provides the resources necessary to support all the proposed initiatives (total cost: $397,700). Option 2 provides resources to enhance career counseling with two Career Counselors and one Student Services Generalist (total cost: $190,600). Option 3 provides resources for the expansion of the Works Scholars program only (total cost: $135,000). Option 4 provides resources to enhance advising with the Veteran's Coordinator and one Student Services Generalist (total cost: $130,800).

4. Who is being served by this request and what are the expected impacts of the funding requested? If this request is not funded who and what are impacted?

   The College believes these investments will increase student access, student retention, and student completion. The College's current graduation rate is 27%; with improved advising, we believe we can increase that rate to over 30% within three years. The College's retention rate is 60%, and if this initiative is funded, we should be able to achieve our stretch goal of 70% institutional retention. If not funded, the College will continue to offer minimal services, using existing staff, impacting veteran and Hispanic students, as well as all students generally, with regard to career education and development. If funded, expansion of the College's Work Scholars program will enable students to have access to higher education who might not otherwise be able to afford college.

AGENCY: Division of Career Technical Ed	Agency No.:	503	FY 2018 Request
FUNCTION: Postsecondary Programs	Function No.:	03	Page ___ of __ Pages Original Submission _X_ or
ACTIVITY:	Activity No.:		Revision No. ___

A: Decision Unit No: **12.01**	Title: **Postsecondary capacity expansion**			Priority Ranking 1 of 11	
DESCRIPTION	**General**	**Dedicated**	**Federal**	**Other**	**Total**
FULL TIME POSITIONS (FTP)	19				19
PERSONNEL COSTS:					
1. Salaries	$1,434,800				$1,434,800
2. Benefits					
3. Group Position Funding					
TOTAL PERSONNEL COSTS:	$1,434,800				$1,434,800
OPERATING EXPENDITURES **by summary object:**					
1. Various	$255,500				$255,500
TOTAL OPERATING EXPENDITURES:	$255,500				$255,500
CAPITAL OUTLAY **by summary object:**					
TOTAL CAPITAL OUTLAY:	$677,700				$677,700
T/B PAYMENTS:	0				0
LUMP SUM:	0				0
GRAND TOTAL	$2,368,000				$2,368,000

Supports institution/agency and Board strategic plans:

Goal 2: Innovation and Economic Development.

Objective A: Workforce Readiness*:*
Prepare students to efficiently and effectively enter and succeed in the workforce.

Overview:

The Division of Career Technical Education funds programs at the six postsecondary institutions' technical colleges throughout the state. Years of flat funding and increased demands on Idaho students to achieve postsecondary education have resulted in long waiting lists for programs across the State and have limited Idaho employers in being able to hire qualified employees. If Idaho cannot accommodate these increased educational demands, it forces students to seek education out of State and can force employers to state to hire the qualified employees. These jobs are often high wage and high demand, which benefit not only the students seeking the education but help to stimulate the economy by providing higher paying jobs and a better educated workforce.

There was $3.8 million appropriated for this purpose in the FY 2017 appropriation, which is being used to expand program capacity at the technical colleges statewide. As a result, it is estimated that 410 Idaho additional students will be placed in specific programs to help meet workforce demands. With this line item, CTE builds on that effort and expects to help an additional 248 Idaho students prepare for currently unfilled job openings for lack of skilled workers. This line items requests ongoing personnel and operating expenses as well as one-time capital outlay to initiate or expand 16 postsecondary CTE programs across the state.

AGENCY: Division of Career Technical Ed	Agency No.:	503	FY 2018 Request
FUNCTION: General Programs	Function No.:	02	Page ___ of __ Pages
ACTIVITY: Secondary Funding	Activity No.:		Original Submission _X_ or Revision No. ___

A: Decision Unit No: **12.02** Title: **Secondary Added Cost Funding** Priority Ranking 2 of 11

DESCRIPTION	**General**	**Dedicated**	**Federal**	**Other**	**Total**
FULL TIME POSITIONS (FTP)					
PERSONNEL COSTS: 1. Salaries 2. Benefits 3. Group Position Funding					
TOTAL PERSONNEL COSTS:					
OPERATING EXPENDITURES **by summary object:** 1. Various					
TOTAL OPERATING EXPENDITURES:					
CAPITAL OUTLAY **by summary object:**					
TOTAL CAPITAL OUTLAY:					
T/B PAYMENTS:	$375,000				$375,000
LUMP SUM:	0				0
GRAND TOTAL	$375,000				$375,000

How connected to institution/agency and Board strategic plans:

Goal 2: Innovation and Economic Development.

Objective A: Workforce Readiness*:*
Prepare students to efficiently and effectively enter and succeed in the workforce.

Description:

Added-cost funding to secondary CTE programs helps ensure program quality by funding the additional costs associated with delivering CTE programs as compared to academic programs. These programs tend to be technology and capital intense and are constantly challenged with maintaining up-to-date equipment. Teaching CTE programs using modern technology provides students with the latest and most relevant skills to meet current workforce demands

Idaho Career Technical Education is requesting $375,000 ongoing from the State General Fund to increase CTE's secondary schools added-cost funding by 5% for all CTE secondary programs.

Questions:

1. What is being requested and why? What is the agency staffing level for this activity and how much funding by source is in the base?

   The request is for an ongoing increase of 5% for all secondary programs.

2. What resources are necessary to implement this request?

   a. List by position: position titles, pay grades, full or part-time status, benefit eligibility, anticipated dates of hire, and terms of service. N/A

   b. Note any existing human resources that will be redirected to this new effort and how existing operations will be impacted. N/A

   c. List any additional operating funds and capital items needed. N/A

3. Please break out fund sources with anticipated expenditures in the financial data matrix. (Please separate one-time vs. ongoing requests.) Non-General funds should include a description of major revenue assumptions: new customer base, fee structure changes, ongoing anticipated grants, etc.

   See cover sheet.

4. Who is being served by this request and what are the expected impacts of the funding requested? If this request is not funded who and what are impacted?

   Students enrolled in secondary CTE programs are served by this request.

   The impact of this request is to help offset the increased costs associated with running the secondary CTE programs and provide students with a learning environment that most closely mirrors the actual workplace demands.

   Students, secondary schools and CTE programs would be impacted if the request were not funded.

AGENCY: Division of Career Technical Ed	Agency No.: 503	FY 2018 Request
FUNCTION: Dedicated Programs	Function No.: 04	Page ___ of __ Pages
ACTIVITY: Industry Partnership	Activity No.:	Original Submission _X_ or Revision No. ___

A: Decision Unit No: **12.03**	Title: **Industry Partnership Fund**			Priority Ranking 3 of 11	
DESCRIPTION	**General**	**Dedicated**	**Federal**	**Other**	**Total**
FULL TIME POSITIONS (FTP)					
PERSONNEL COSTS: 1. Salaries 2. Benefits 3. Group Position Funding					
TOTAL PERSONNEL COSTS:					
OPERATING EXPENDITURES **by summary object:** 1. Various					
TOTAL OPERATING EXPENDITURES:					
CAPITAL OUTLAY **by summary object:**					
TOTAL CAPITAL OUTLAY:					
T/B PAYMENTS:	$1,000,000				$1,000,000
LUMP SUM:	0				0
GRAND TOTAL	$1,000,000				$1,000,000

Supports institution/agency and Board strategic plans:

Goal 1, Objective E: Education to Workforce Alignment- Deliver relevant education that meets the needs of Idaho and the region.

Description:

In the 2016 legislative session, Senate Bill 1332 established an Industry Partnership Fund for the purpose of providing timely access to relevant college credit and noncredit training and support projects. Technical colleges will work with regional industry partners to provide a rapid response to gaps in skills and abilities using moneys from the fund.

This bill was not funded in the 2016 legislative session. This line item requests ongoing funding for the Industry Partnership Fund to allow the six postsecondary technical colleges to react swiftly to the educational needs of industry.

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AGENCY: Division of Career Technical Ed	Agency No.:	503/504	FY 2018 Request
FUNCTION: Postsecondary Programs	Function No.:	03	Page ___ of __ Pages
ACTIVITY: Eastern Idaho Technical College	Activity No.:		Original Submission _X_ or Revision No. ___

A: Decision Unit No: **12.04** Title: **EITC Human Resource position** Priority Ranking 4 of 11

DESCRIPTION	**General**	**Dedicated**	**Federal**	**Other**	**Total**
FULL TIME POSITIONS (FTP)	1.00				1.00
PERSONNEL COSTS:					
1. Salaries	$52,300				$52,300
2. Benefits	22,800				22,800
3. Group Position Funding					
TOTAL PERSONNEL COSTS:	$75,100				$75,100
OPERATING EXPENDITURES **by summary object:**					
1. Various					
TOTAL OPERATING EXPENDITURES:					
CAPITAL OUTLAY **by summary object:**					
TOTAL CAPITAL OUTLAY:					
T/B PAYMENTS:					
LUMP SUM:					
GRAND TOTAL	$75,100				$75,100

Supports institution/agency and Board strategic plans:

Goal 3, Objective D: Productivity and Efficiency- Apply the principles of program prioritization for resource allocation and reallocation.

Questions:
In the past, Eastern Idaho Technical College (EITC) Human Resource positions were handled as an “additional duty” along with other College functions. Last year (2014-15) Human Resources was handled by a support/clerical positon assigned to HR. This academic year EITC found funding within EITC budgets and were able to hire a full-time HR position to manage the complexities of the State HR systems/benefits as well as local requirements including payroll functions.

In addition to transactional workload, this position has a higher level of responsibility than a "typical" HR Specialist:

- As the sole Human Resource professional for the agency, provides planning and management for all Human Resources processes and procedures;
- Position functions as a "business partner", serving on the President's Advisory Council and the Executive Committee;
- Represents the College in the community;
- Responsible for developing policy and procedure, developing and conducting training;
- Responsible for HR systems planning for the potential change to a community college next spring

Personnel costs are the largest single operating cost of the College. Personnel costs accounted for $7.4 million of the $11.8 million dollars in total operating costs for fiscal year ending June 30, 2015; over 60%. Effective personnel management is critical to the operation of the college.

Request for HR Specialist - EITC

- Current FT positions as of Fall 2016: 110
- Current PT & Adjunct NOT including Fire Service Training (FST): 253
- Part Time FST: 214 (EITC does all the hiring administration and payroll processing, so Fire Service Training is as much HR "work" as other part-time employees)
- **Total Employees (FT & PT): 577**
- New hires processed each year approximately **95**.
- Total processed New Hires and Rehires is **218** per year.

Given the complexities and personnel risks facing each post-secondary institution, the request for a full FTE HR Specialist is EITC's highest priority for this funding period.

Questions:

1. What is being requested and why? What is the agency staffing level for this activity and how much funding by source is in the base? EITC is requesting 1 FTE Human Resources Senior position for EITC. EITC currently has one position in HR that is required to do all of the payroll plus all the employee HR functions. This position does all of the payroll for EITC employees plus all of the workforce adjunct who teach workforce classes. EITC has over 11,000 students each year that are in workforce or community education. EITC also has taken over the Fire Service training for the State. This requires HR support and payroll functions. It is important that EITC provide adequate services for all of its employees and protect their rights. This position would be at the level to work with the other HR professionals in the State.

2. What resources are necessary to implement this request? EITC would need to hire a HR Senior and use its current position of specialist to do payroll and other functions at the specialist level.
   a. List by position: Human Resources Senior Position, Pay grade M, Full time with benefits. This person would start when funding is approved
   b. Note any existing human resources that will be redirected to this new effort and how existing operations will be impacted. This would be a new position at EITC.
   c. List any additional operating funds and capital items needed. No new operating or capital funds are needed

3. Please break out fund sources with anticipated expenditures in the financial data matrix. (Please separate one-time vs. ongoing requests.) This is an on-going request for funding

4. Who is being served by this request and what are the expected impacts of the funding requested? If this request is not funded who and what are impacted?

   Employees are greatly affected by the service of the HR department. Hiring, firing, retirement, CEC and many other areas need to be covered by a well-educated HR employee. New reporting is now being required for HR departments to meet Federal guidelines. If this request is not funded, employees may not get the information to make decisions that could affect employment and retirement. Because of the increase of new faculty, workforce training demands and Fire Service education for the State, this position is critical to ensure that employees are paid on time and have the HR support they need to make employment decisions.

5. If this is a high priority item, list reason why unapproved Line Items from the prior year budget request are not prioritized first. There are many requests, and this request will replace some of those requested in previous years. EITC has re-evaluated some of the priorities on the EITC campus and a fully functioning HR department is very important to the stability of EITC. This was submitted last year but was not funded. This would be EITC’s top priority for funding this year.

EITC Eastern Idaho Technical College

April 25, 2016

Recommendation for HR Specialist Senior for EITC

The requested Human Resources Senior position is the highest priority for EITC in this next budgeting cycle. EITC has not had the benefit of a highly qualified and experience HR position in the past. Given the myriad of complex federal, state, local and college hiring requirements, a seasoned expert in human resources is a necessity. A college relies heavily on employees in the fulfillment of its teaching and learning mission. Having a senior, seasoned HR professional is indispensable in order to recruit, retain and grow our expanding workforce. EITC is competing for the recruitment of a professional workforce as well as attempting to retain our existing faculty and staff. At this point, EITC has only one HR position, and that position is working out of class given the extent of required duties. Outside of managing our complex professional workforce, a single HR mistake in the hiring or mishandling of a personnel issue could be costly to the institution. Additionally, our existing workforce of faculty, staff and managers all have ongoing professional development requirements which would be integrated into this position's job duties.

Given the challenging hiring requirements for technical and professional positions, EITC will need an experienced HR professional to attract and employ into our workforce. It is equally important for EITC to ensure existing employees understand their benefits and are mentored toward professional development and career progression. Without an expert in this strategic position EITC may experience constant turnover of highly skilled employees to other employment opportunities or the possibility of an employment or discipline mistake. Increasing the status and compensation of this HR position will better ensure expertise and consistency in this position.

Regards,

Dr. Rick Aman

Interim President, Eastern Idaho Technical College

AGENCY: Division of Career Technical Ed	Agency No.: 503	FY 2018 Request
FUNCTION: Related Services	Function No.: 05	Page ___ of __ Pages
ACTIVITY: Adult Basic Education	Activity No.:	Original Submission _X_ or Revision No. ___

A: Decision Unit No: **12.05** Title: **Adult Basic Education Expansion** Priority Ranking 5 of 11

DESCRIPTION	**General**	**Dedicated**	**Federal**	**Other**	**Total**
FULL TIME POSITIONS (FTP)					
PERSONNEL COSTS: 1. Salaries 2. Benefits 3. Group Position Funding					
TOTAL PERSONNEL COSTS:					
OPERATING EXPENDITURES **by summary object:** 1. Various					
TOTAL OPERATING EXPENDITURES:					
CAPITAL OUTLAY **by summary object:**					
TOTAL CAPITAL OUTLAY:					
T/B PAYMENTS:	$250,000				$250,000
LUMP SUM:	0				0
GRAND TOTAL	$250,000				$250,000

Supports institution/agency and Board strategic plans:

Goal 1, Objective B: Adult learner Re-Integration – Improve the processes and increase the options for re-integration of adult learners, including veterans, into the education system.

Executive Summary

- **Funding type**: Trustee benefits/local provider grants
- **Total Funding Request**: $1,090,900
    - **Increase amount**: $250,000
- **Description**: Additional funds are needed to expand the Adult Basic Education Program's capacity to transition underprepared adults into college and meaningful employment. Specifically, funds will be used to expand instructional hours and staff capacity, expand instructional offerings, increase services for rural communities,

and allow for competitive salaries to attract and retain high-quality, effective instructors.

- **Justification**: It is unlikely that Idaho can meet its 60% educational attainment goal, let alone the employer demands for a highly skilled workforce by focusing solely on high school graduates. Therefore it is vital that the state establish and expand other pathways for students to receive education and training. As an integral part of Idaho's workforce development system and post-secondary student pipeline, Adult Basic Education plays a critical role in establishing and sustaining these pathways. Idaho's ABE programs have the potential to serve as a significant on-ramp into post-secondary education and training for non-traditional, underprepared, and returning adult students. Increased support for these programs will improve outcomes in GED completion, post-secondary enrollment, student employment, and median wage earnings.

- **Additional Considerations**:
  - ABE experienced an overall 12.5% decrease in funds over the course of the recession, as compared to FY08. Funds have remained at this decreased level ($840,900) since FY11.
  - Our federal grant requires local maintenance of effort at 90%, so any increase that is awarded must be met at 90% year-over-year.

Expanded Narrative

We are requesting an ongoing funding increase in trustee/ benefit in the amount of $250,000 for Adult Basic Education. Idaho's ABE program is carried out through six regions, with one public college or university providing services for each region. This request represents a realistic, but meaningful budget increase that would allow all six regions to improve and sustain their program offerings. As a result, our program will increase its capacity to educate and transition underprepared adults into college and careers. Increased support for these programs will also improve outcomes in GED completion, post-secondary enrollment, student employment, and median wage earnings.

Adult Basic Education (ABE) is a federally authorized program and an integral component of Idaho's workforce development and post-secondary system. The ABE program, which is located across six of Idaho's colleges and universities, offers rigorous academic instruction to adults who need to improve their skills in literacy, math, and the English language in order to get a job, improve a career, and/or successfully "go on" to college and training.

As authorized under the Workforce Investment Act (WIA) of 1998, the ABE program was historically focused on providing academic instruction up to and including high-school equivalency. However, in the latter years of WIA, the focus expanded significantly to include college and career readiness. In 2014, Congress passed the Workforce Innovation and Opportunity Act (WIOA) which replaced the prior law. Under the new law, college and career readiness was formalized as one of ABE's major functions.

The passage of WIOA is an important opportunity to help Idaho meet its educational goals and workforce needs. Idaho is not likely to reach its goal of a 60% college completion rate—let alone meet employer demands for a highly skilled workforce—by focusing solely on high school graduates. Therefore, it is vital that the state establish other pathways for other types of students to receive education and training. With many of the changes presented in the new law, Idaho's ABE programs have the potential to serve as a significant on-ramp into post-secondary education and training for non-traditional, underprepared, and returning adult students.

While WIOA presents a large step toward improving Idaho's workforce development system, these new opportunities also pose budgetary challenges for the ABE program. In order to expand and sustain comprehensive college and career readiness services, local providers will require additional planning capabilities, expanded instructional hours and offerings, and the ability to attract and/or retain high-quality instructors with competitive pay. Local providers will also be expected to increase the level of collaboration and planning with their post-secondary institutions and other agencies and workforce development programs.

As an additional point of interest, the timing of this allocation will coincide with Idaho's new competitive grant application process under the new law for ABE providers. This process will ensure that increased funding levels are being used to support well-vetted, high-quality programs. We plan to run the competition in late 2016/early 2017, with final grant awards being allocated on July 1, 2017.

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AGENCY: Division of Career Technical Ed	Agency No.: 503	FY 2018 Request
FUNCTION: Dedicated Programs	Function No.: 04	Page ___ of __ Pages
ACTIVITY: Secondary Education	Activity No.:	Original Submission _X_ or Revision No. ___

A: Decision Unit No: **12.06** Title: **Secondary Incentive Funding** Priority Ranking 6 of 11

DESCRIPTION	**General**	**Dedicated**	**Federal**	**Other**	**Total**
FULL TIME POSITIONS (FTP)	1.0				1.0
PERSONNEL COSTS:					
1. Salaries	$41,000				$41,000
2. Benefits	20,400				20,400
3. Group Position Funding					
TOTAL PERSONNEL COSTS:	$61,400				$61,400
OPERATING EXPENDITURES **by summary object:**					
1. Program administration - Ongoing	$10,000				$10,000
2. Performance data system- One-Time	75,000				75,000
TOTAL OPERATING EXPENDITURES:	$85,000				$85,000
CAPITAL OUTLAY **by summary object:**					
TOTAL CAPITAL OUTLAY:					
T/B PAYMENTS:	$350,000				$350,000
LUMP SUM:	0				0
GRAND TOTAL	$496,400				$496,400

Supports institution/agency and Board strategic plans:

Goal 1, Objective D: Quality Education-
Deliver quality programs that foster the development of individuals who are entrepreneurial, broadminded, critical thinkers and creative.

Description:
In 2014 Agricultural and Natural Resources education programs established an incentive-based program for funding Agriculture and Natural Resources CTE programs. (Idaho Code 33-1629). As one of its major initiatives to improve secondary CTE education across the state, CTE is in the process of proposing new legislation that would expand incentive funding for Career &Technical Education (CTE) secondary programs in the other five program areas of Business Management and Marketing, Engineering and

Technology, Family and Consumer Sciences, Health Professions, and Skilled and Technical Sciences.

Under the proposed legislation, the Division would provide incentive-based funding to both high performing programs and those programs in need of additional support and technical assistance. This performance-based approach would more clearly demonstrate the return on investment provided by career technical education and hold CTE programs more accountable for producing results.

The administration of the Agriculture Incentive Program is very demanding on staff resources and this demand continues to increase as the number of applicants increases and program visits of past recipients is required. In addition, there are unfunded costs to bring in impartial proposal evaluators to decide on which applicant programs will be funded.

We are requesting 1 FTP for a Grants Operations Analyst- Pay Grade K to help administer the program. We are also requesting ongoing operating expenses of $10,000 to cover the cost of running the existing incentive program, including contracting with individuals throughout the state to evaluate proposals and $75,000 in one-time funding to develop performance measures and a data reporting system.

As the success of the current program increases, we are requesting ongoing funding for an additional $25,000 to be passed through to Agriculture programs in the form of an additional start-up grant and $325,000 to be awarded to the five program areas under the new Secondary Incentive Funding program.

AGENCY: Division of Career Technical Ed	Agency No.:	503	FY 2018 Request
FUNCTION: State Leadership	Function No.:	01	Page ___ of __ Pages
ACTIVITY:	Activity No.:		Original Submission _X_ or Revision No. ___

A: Decision Unit No: **12.07**	Title: **Horizontal Alignment and Online courses**			Priority Ranking 7 of 11	
DESCRIPTION	**General**	**Dedicated**	**Federal**	**Other**	**Total**
FULL TIME POSITIONS (FTP)					
PERSONNEL COSTS: 1. Salaries 2. Benefits 3. Group Position Funding					
TOTAL PERSONNEL COSTS:					
OPERATING EXPENDITURES **by summary object:** 1. Various	$196,000				$196,000
TOTAL OPERATING EXPENDITURES:	$196,000				$196,000
CAPITAL OUTLAY **by summary object:**					
TOTAL CAPITAL OUTLAY:					
T/B PAYMENTS:					
LUMP SUM:	0				0
GRAND TOTAL	$196,000				$196,000

How connected to institution/agency and Board strategic plans:

Goal 3: Effective and Efficient Educational System-

Objective C: Alignment and Coordination-*:*
Facilitate and promote the articulation and transfer of students throughout the education pipeline.

Description:

In the 2015 legislative session, amendments to Idaho Code 33-2205 (3) and (4) outline the intent that the Division of Career Technical Education will coordinate with the Idaho Digital Learning Academy to provide approved online career technical education courses and that the Division will incentivize Idaho public colleges and universities offering career technical programs to align their foundational courses to achieve uniformity and transferability.

These initiatives were started in Fiscal Year 2015 using Division funds available for this purpose. The continuation of this project into FY 2017 will require one-time funds of $128,000 to align 15 programs from Secondary to Postsecondary and $68,000 for CTE Digital to create 4 online courses through the Idaho Digital Learning.

AGENCY: Division of Career Technical Ed	Agency No.: 503	FY 2018 Request
FUNCTION: Related Services	Function No.: 05	Page ___ of __ Pages
ACTIVITY: CPM and Health Matters	Activity No.:	Original Submission _X_ or Revision No. ___

A: Decision Unit No: **12.08**	Title: **Transfer CPM & Health Matters back to DHR**			Priority Ranking 8 of 11	
DESCRIPTION	**General**	**Dedicated**	**Federal**	**Other**	**Total**
FULL TIME POSITIONS (FTP)		(3.0)			(3.0)
PERSONNEL COSTS:					
1. Salaries		($243,600)			($243,600)
2. Benefits					
3. Group Position Funding					
TOTAL PERSONNEL COSTS:		($243,600)			($243,600)
OPERATING EXPENDITURES **by summary object:**					
1. Various		($31,500)		($140,000)	($171,500)
TOTAL OPERATING EXPENDITURES:		($31,500)			($171,500)
CAPITAL OUTLAY **by summary object:**					
TOTAL CAPITAL OUTLAY:		0			0
T/B PAYMENTS:		0			0
LUMP SUM:		0			0
GRAND TOTAL		($275,100)		($140,000)	($415,100)

Supports institution/agency and Board strategic plans:

The CPM and Health Matters program goals are more aligned with the Division of Human Resources, therefore the program will be moved back to DHR in Fiscal Year 2018.

CPM and Health Matters

In Fiscal Year 2009 the Certified Public Manager Program and the Health Matters Program were transferred to the Division of Career Technical Education and funded through the Division of Human Resources' (DHR) appropriation. Since that time, DHR has experienced changes to its structure and operations and now provides certain types of employee training. With those changes, these programs are now complementary to DHR's role in state government. Their transition back to DHR would allow the Division of Career Technical Education to focus on its mission of preparing Idaho's youth and adults for high-skill, in-demand careers. The transition of these programs back to the DHR began in FY 2017 and this ongoing line item would allow the funding to remain in the Division of Human Resources and allow for the transfer of the three associated positions.

AGENCY: Division of Career Technical Ed	Agency No.: 503	FY 2018 Request
FUNCTION: General Programs	Function No.: 02	Page ___ of __ Pages Original Submission _X_ or
ACTIVITY: Skillstack	Activity No.:	Revision No. ___

A: Decision Unit No: **12.09**	Title: **Skillstack micro-certification platform**			Priority Ranking 9 of 11	
DESCRIPTION	**General**	**Dedicated**	**Federal**	**Other**	**Total**
FULL TIME POSITIONS (FTP)					
PERSONNEL COSTS: 1. Salaries 2. Benefits 3. Group Position Funding					
TOTAL PERSONNEL COSTS:					
OPERATING EXPENDITURES **by summary object:** 1. Various					
TOTAL OPERATING EXPENDITURES:					
CAPITAL OUTLAY **by summary object:**					
TOTAL CAPITAL OUTLAY:					
T/B PAYMENTS:		$15,000			$15,000
LUMP SUM:	0				0
GRAND TOTAL		$15,000			$15,000

Supports institution/agency and Board strategic plans:

Goal 3, Objective C: Alignment and Coordination- Facilitate and promote the articulation and transfer of students throughout the education pipeline.

Executive Summary

- Idaho SkillStack is the badging/micro-certification platform that is used by the Division of Career Technical Education to articulate technical competency credits between secondary and postsecondary CTE programs. In addition, Idaho's public higher education institutions use SkillStack to award badges to individuals in their non-credit workforce training programs and other academic programs. Currently, Boise State University and North Idaho College are actively awarding badges.

Lewis-Clark State College, College of Western Idaho, College of Southern Idaho, Idaho State University and Eastern Idaho Technical College will begin awarding badges in late 2016.

- The ongoing $15,000 request in spending authority covers an annual maintenance fee of $7,500 and an additional $7,500 in site development to accommodate planned upgrades of SkillStack to further support industry and education. All funds will be paid to Idaho Digital Learning Academy who developed the platform. This line item allows CTE to spend administration fees that are charged to the institutions to support this website. All institutions are currently under a no-cost MOU to use SkillStack and those MOUs will expire in September 2016. The institutions are aware that an administration fee in the amount of $1,500 - $2,500 will be assessed as MOUs are renewed and institutions ramp up their usage of SkillStack. The Division is still in the process of determining the actual cost of administering the website/platform and will finalize the per-institution cost prior to the renewal of the MOUs.

AGENCY: Division of Career Technical Ed	Agency No.:	503	FY 2018 Request
FUNCTION: Related Services	Function No.:	05	Page ___ of __ Pages
ACTIVITY: Professional Development Conference	Activity No.:		Original Submission _X_ or Revision No. ___

A: Decision Unit No: **12.10** Title: **Professional Development Conference Spending Authority** Priority Ranking 10 of 11

DESCRIPTION	General	Dedicated	Federal	Other	Total
FULL TIME POSITIONS (FTP)					
PERSONNEL COSTS: 1. Salaries 2. Benefits 3. Group Position Funding					
TOTAL PERSONNEL COSTS:					
OPERATING EXPENDITURES **by summary object:** 1. Various		$250,000			$250,000
TOTAL OPERATING EXPENDITURES:		$250,000			$250,000
CAPITAL OUTLAY **by summary object:**					
TOTAL CAPITAL OUTLAY:					
T/B PAYMENTS:	0				0
LUMP SUM:	0				0
GRAND TOTAL		$250,000			$250,000

Supports institution/agency and Board strategic plans:

Goal 3, Objective B: Quality Teaching Workforce
Develop, recruit and retain a diverse and highly qualified workforce of teachers, faculty and staff.

Career & Technical Education Professional Development Conference

The Division of Career Technical Education provides training each summer to career and technical educators from throughout the state at both the secondary and postsecondary levels. The training is fully funded through conference registration fees and historically College of Western Idaho has served as the fiscal agent by paying for conference expenses and collecting funds. In FY 2017 CTE began collecting and disbursing fees using their existing fiscal staff and used spending authority that had been carried forward from prior years. CTE would like to request $250,000 in ongoing spending authority to continue to run the conference out of funds collected from conference registration fees.

AGENCY: Division of Career Technical Ed	Agency No.:	503/504	FY 2018 Request
FUNCTION: Postsecondary Programs	Function No.:	03	Page ___ of __ Pages
ACTIVITY: Eastern Idaho Technical College	Activity No.:		Original Submission _X_ or Revision No. ___

A: Decision Unit No: **12.11**	Title: **EITC Finance Director**			Priority Ranking 11 of 11	
DESCRIPTION	**General**	**Dedicated**	**Federal**	**Other**	**Total**
FULL TIME POSITIONS (FTP)	1.0				1.0
PERSONNEL COSTS:					
1. Salaries	$78,000				$78,000
2. Benefits	28,200				28,200
3. Group Position Funding					
TOTAL PERSONNEL COSTS:	$106,200				$106,200
OPERATING EXPENDITURES **by summary object:**					
1. Various					
TOTAL OPERATING EXPENDITURES:					
CAPITAL OUTLAY **by summary object:**					
TOTAL CAPITAL OUTLAY:	0				0
T/B PAYMENTS:	0				0
LUMP SUM:	0				0
GRAND TOTAL	$106,200				$106,200

Supports institution/agency and Board strategic plans:

Goal 3, Objective D: Productivity and Efficiency- Apply the principles of program prioritization for resource allocation and reallocation.

Questions:

1. What is being requested and why? What is the agency staffing level for this activity and how much funding by source is in the base? EITC is requesting 1 FTE for a Finance Director who will oversee the CTE budget and multiple grants for EITC. EITC currently has a controller but this new position will allow EITC to be more in-line with the other technical colleges in Idaho that rely on financial resources available in the institutions' central administration. It is important that EITC provide adequate financial services while maintaining critical control over all funds that pass through EITC.

2. What resources are necessary to implement this request? EITC would need to hire 1 FTE Finance Director that would oversee the financial office at EITC.
   a. List by position.
      i. Non-classified finance Director
   b. Note any existing human resources that will be redirected to this new effort and how existing operations will be impacted.
      i. This would be a new position for EITC and help balance and coordinate the workload in the finance office.
   c. List any additional operating funds and capital items needed.
      i. No new operating or capital funds are needed

3. Please break out fund sources with anticipated expenditures in the financial data matrix. (Please separate one-time vs. ongoing requests.) This is an on-going request for funding
4. Who is being served by this request and what are the expected impacts of the funding requested? If this request is not funded who and what are impacted? Employees and students are greatly affected by the service of the finance department. Currently EITC finance people work many overtime hours and are not able to use them.
5. If this is a high priority item, list reason why unapproved Line Items from the prior year budget request are not prioritized first. There are many requests, and this request will replace some of those requested in previous years. EITC has re-evaluated some of the priorities on the EITC campus and have found that the business office is very understaffed to complete the tasks required by EITC, CTE and the State of Idaho

With growing Federal, State and other Regulatory requirements for School finance both the Controller and Assistant Controller work approximately 10 hours of unpaid overtime each week. The EITC Business Office is responsible for many activities that are not performed at other state funded technical Colleges. EITC, because of its unique position, often is required to complete requests and projects similar to Universities with more staff. The EITC business office completes these request with a total staff of six people, dramatically less than other colleges and universities. Separation of responsibilities, turnover and training is all consuming. Attending meetings, outside training and employee development is nearly impossible.

Examples of EITC Business Office responsibilities:

- Consolidated Financial Statements
- Point of Sale activity for the college
- Accounting Software maintenance.
- Reconciling multiple bank accounts and the account with the State's Treasury
- Billing of approximately 30 Federal, State and local grants
- AP, AR, and Purchasing management

- STARS work and processing
- Time and Effort Reporting for Grants
- Interagency Billings
- Sales Tax Reporting
- CTE Budget preparation
- Detail Budget Preparation
- Payroll processing to the General Ledger
- PCARD administration
- Position Request approval, and IPOPS approval
- INL and Radiation Safety grant billings
- Full General Ledger maintained by fund.
- Two external audits by Moss-Adams
- Much reporting for staff and faculty
- 1098 and 1099 tax reporting
- Colleague understanding, training and use.
- Financial Aid processing and payments for College

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AGENCY: College of Southern Idaho	Agency No.: 501	FY 2018 Request
FUNCTION: Community College	Function No.:	Page ___ of __ Pages
ACTIVITY: Center for Education Innovation (CSI)	Activity No.:	Original Submission _X_ or Revision No. ___

A: Decision Unit No: **12.01**	Title: **CEI Initiative**			Priority Ranking 1 of 4	
DESCRIPTION	**General**	**Dedicated**	**Federal**	**Other**	**Total**
FULL TIME POSITIONS (FTP)					0.0
PERSONNEL COSTS:					
1. Salaries	0				0
2. Benefits	0				0
3. Group Position Funding					
TOTAL PERSONNEL COSTS:	0				0
OPERATING EXPENDITURES **by summary object:**					
1. Travel	$8,000				$8,000
2a. Contract services (project manager)	60,000				60,000
2b. Contract services (architect fees)	200,000				200,000
3. Supplies	2,000				2,000
TOTAL OPERATING EXPENDITURES:	$270,000				$270,000
CAPITAL OUTLAY **by summary object:**	0				0
TOTAL CAPITAL OUTLAY:	0				0
T/B PAYMENTS:					
LUMP SUM:					
GRAND TOTAL	$270,000				$270,000

Supports institution/agency and Board strategic plans:

CSI Core Theme 1: Community Success

As a community college, we are committed to responding to the diverse needs of the communities we serve and to taking a leadership role in improving the quality of life of the members of those communities.

- Objective #1: Strengthen the social fabric in the communities we serve
- Objective #3: Meet the workforce needs of the communities we serve

Core Theme 2: Student Success

As an institution of higher education, we exist to meet the diverse educational needs of the communities we serve. Above all institutional priorities is the desire for every student to experience success in the pursuit of a quality education.

- Objective #1: Foster participation in post-secondary education
- Objective #2: Reinforce a commitment to instructional excellence

Performance Measure:

Rather than a performance measure, this is a critical success activity to be completed. The outcome will be a programming and facilities plan for the Center for Education Innovation (attached whitepaper).

Description:

This request is intended to support the program planning, infrastructure, staffing, and facility design for the proposed Center for Education Innovation, in cooperation with Idaho State University. See the attached whitepaper describing the proposed center.

Questions:

1. What is being requested and why? What is the agency staffing level for this activity and how much funding by source is in the base?

   Planning and design funds, including project management. No ongoing staff is included in the CSI request.

2. What resources are necessary to implement this request?

   a. List by position: position titles, pay grades, full or part-time status, benefit eligibility, anticipated dates of hire, and terms of service.

      No personnel in this request.

   b. Note any existing human resources that will be redirected to this new effort and how existing operations will be impacted.

      Certainly many CSI staff will be somewhat impacted by participation in the design and planning work, but not to a significant degree. The requested funds include a project manager by contract for only FY2017-2018.

   c. List any additional operating funds and capital items needed.

3. Provide additional detail about the request, including one-time versus ongoing.

4. Include a description of major revenue assumptions, for example, whether there is a new customer base, fee structure changes, or anticipated grant awards.

   This is a one-time, one-year request for planning and design work. See the attached whitepaper for more information.

5. Who is being served by this request and what are the expected impacts of the funding requested? If this request is not funded who and what are impacted?

   All residents of Idaho would be served by the intent of the Center for Education Innovation. The expectation will be significant improvement in the preparation of Idaho teachers. For more specific information see the attached whitepaper. If this request is not funded, CSI will forge ahead, but will be at a significant disadvantage in terms of timeliness and progress: the Center may never come to fruition without this planning and design support.

Center for Education Innovation

A joint whitepaper and vision statement | College of Southern Idaho | Idaho State University

May 2016

Introduction

Idaho State University and the College of Southern Idaho jointly propose the design, development, and creation of the Center for Education Innovation (CEI), a visionary and collaborative facility and programming venture to be situated on the CSI campus in Twin Falls and jointly operated.

The CEI initiative attempts to address numerous issues in early childhood, elementary, secondary, and higher education in Idaho. Among them:

- Concerns with current state of teacher education in Idaho
- Need for expanded professional development opportunities for teachers at all levels of education
- Need for more research specifically for the benefit of the Idaho education pipeline to benefit the educational systems of Idaho, including the impact of teacher training in early education
- Tremendous challenges in addressing K12 teacher shortages and demands, especially in rural areas
- Addressing and assessing the proposals and initiatives suggested by the Idaho Education Task Force, national best practices, Idaho Business for Education, and other constituents
- Providing research support and facilitation for the K-20 pipeline
- Providing support for alignment of K12 and university curriculum and college readiness

Situating the CEI facility in Twin Falls on the CSI campus is prompted by the growth, demand, and opportunity specific to the Magic Valley region. CSI has been a pioneer with regard to partnerships and greater integration in K12, demonstrated by the growth of concurrent enrollment, collaborative education ventures, transition coordinator implementation, and other initiatives. Idaho State University has a long history with dual enrollment with its Early College Program and has worked closely with school districts on curricular alignment and K12-related research within its Albion Center for Education Innovation. The longstanding presence of ISU on the CSI campus, with emphasis on the ISU College of Education, together with the spirit of collaboration and articulation suggest tremendous opportunity for both growth and success.

The vision includes a focal point for education research, development of innovation in teacher training at all levels, and reform for all of Idaho. It provides a testbed for practice, and an opportunity to significantly revise the direction, services and support we provide for educator education, training and professional development.

College of Southern Idaho Operational Vision

The College of Southern Idaho proposes the Center for Education Innovation as a current leader in the pursuit of instructional excellence and preparation of teachers serving in Idaho. The CEI facility provides an opportunity to consolidate teaching and learning lab schools in a revolutionary way, in particular at the early childhood and elementary levels. The operation supports our CSI's Core Themes of Community Success and Student Success by advancing and applying research in a controlled setting, while providing a local pathway to baccalaureate and graduate education.

Various existing and planned programs, services, and operations would or could be housed in the facility:

- CSI Center for Innovation and Teaching Excellence
- CSI Education Department
  - CSI Early Childhood Education Program (including existing labs/lab schools)
  - Transfer education programs
  - Paraprofessional training programs
  - Teacher professional development, continuing education operations
- Rural Education Resource Center
- Southern Idaho P20 Teaching Excellence Initiative
- CSI Higher Education Center (ISU/BSU/UI)
- South Central Idaho Education Partnership (regional Education Idaho Network)
- Region IV iSTEM
- CSI STEM Resource Center

Idaho State University Operational Vision

The partnership between the CSI and ISU for a Center for Education Innovation (CEI) will increase ISU's potential to recruit, retain, and support professional educators in the Magic Valley and will expand the ability to offer high quality educator preparation and professional development in this area. The CEI aligns with ISU's Core Theme One (Learning and Discovery) by continuing and expanding our ability to deliver effective and high quality academic programs that support educator preparation and professional development in the Magic Valley. The CEI aligns with ISU's Core Theme Two (Access and Opportunity) by expanding our opportunity to recruit potential future teachers in secondary school settings and by ensuring that students have access to critical support functions necessary to be successful throughout their education. The CEI also aligns with ISU Core Theme Four (Community Engagement and Impact) by providing a structure that facilitates partnership creation and collaboration and professional development centers for professional educators in the field.

Various existing programs, services, and operations would or could be housed in the facility:

- ISU College of Education Twin Falls Center
- ISU Twin Falls Office for the Albion Center for Education Innovation
- Region IV TRIO
- Regional Math Resource Center

- ISU Community College Leadership program

A future vision and opportunities

Evolving and future opportunities include:

- Consideration of partnering with Twin Falls School District to create an elementary school as a component of the project and as a lab school
- Expanded education research
- Direct linkage with Idaho SDE and Professional Standards Commission
- Revision and improvement of Idaho Career Technical Education (CTE) programming and continuing education support
- Childhood through college education lab research under one roof with shared resources and faculty
- Active research with regard to “education innovation in action,” including expanded K12-postsecondary education partnerships, collaboration, and pilot studies

Moving forward

Initial steps include a joint request from CSI and ISU for planning and design funding in order to fully develop and synchronize the operations, programming, and facility concept. This would culminate in a formal building request by the College of Southern Idaho and Idaho State University to the Permanent Building Council.

Attendant staffing and occupancy cost requests will follow as appropriate.

AGENCY: College of Southern Idaho	Agency No.: 501	FY 2018 Request
FUNCTION: Community College	Function No.:	Page ___ of __ Pages Original Submission _X_ or
ACTIVITY: Summer Bridge	Activity No.:	Revision No. ___

A: Decision Unit No: 12.02	Title: Bridge to Success Summer Bridge			Priority Ranking 2 of 4	
DESCRIPTION	**General**	**Dedicated**	**Federal**	**Other**	**Total**
FULL TIME POSITIONS (FTP)	1.0				1.0
PERSONNEL COSTS:					
1. Salaries	$35,000				$35,000
2. Benefits	19,400				19,400
3. Group Position Funding	24,000				24,000
TOTAL PERSONNEL COSTS:	$78,400				$78,400
OPERATING EXPENDITURES **by summary object:**					
1. Travel					
2. Software					
3. Operating Supplies	$52,000				$52,000
4. Faculty Professional Develop.	2,500				2,500
TOTAL OPERATING EXPENDITURES:	$54,500				$54,500
CAPITAL OUTLAY **by summary object:**					
1. New Computer Lab					
TOTAL CAPITAL OUTLAY:	0				0
T/B PAYMENTS:					
LUMP SUM:					
GRAND TOTAL	$132,900				$132,900

Supports institution/agency and Board strategic plans:

Goal 1, Objective B

Higher Level of Education Attainment – Increase the educational attainment of all Idahoans through participation in Idaho's educational system

Performance Measure:

1. Increase Math 043, Math 143, and Math 153 course completion rates for the College of Southern Idaho by 20% by fiscal year 2020 (May 2020). Fall 2016 benchmark.
2. Increase Math 043, Math 143, and Math 153 credits successfully completed by 20% by fiscal year 2020 (May 2020). Fall 2016 benchmark.

3. Increase graduation rates for the College of Southern Idaho from 18% to 22% by fiscal year 2020 (May 2020) – IPEDS definition of graduation rate. Fall of 2016 benchmark.
4. Increase retention in degree and certificate programs at the College of Southern Idaho from 50% to 60% by fiscal year 2020 (May 2020) – IPEDS definition of Fall to Fall retention rate. Fall of 2016 benchmark.
5. Increase the number of students earning degree or certificates by 20% by fiscal year 2020 (May 2020). Fall 2016 benchmark.

Description:
This request is to provide an intensive Bridge to Success Summer Bridge program that provides first time, degree-seeking students a head start in their transition to college. The program introduces students to the academic expectations of college, specifically for degrees that require challenging first-semester course work in math, since math is a key indicator of student success and degree completion. Moreover, the program develops 21st century skills that are essential in the classroom and in the workplace; promotes community engaged learning; familiarizes students to valuable campus resources to increase student success; fosters social and academic relationships with peers, faculty, and staff; and provides academic coaching. This request allows CSI to develop bridge academies that have math as their core course. This request involves hiring a full-time bridge coordinator, adjunct faculty to teach summer bridge courses, and tutors to provide summer bridge instructional support.

Questions:

1. What is being requested and why? What is the agency staffing level for this activity and how much funding by source is in the base?

   One (1) FTE is being requested for a) coordination of Summer Bridge program development b) develop and maintain an ongoing excellence in teaching protocol for all full and part-time faculties, and c) provide continued support for bridge participants through degree/certificate attainment.

   Part-time adjunct math and bridge instructors will be provided to teach summer bridge courses; part-time tutors will be provided to assist students. Academic coaches and student success personnel are already in place for this project.

   One (1) FTE for Summer Bridge Program Coordinator: $35,000

   Part-time adjunct instructors: $14,000

   Tutors: $10,000

2. What resources are necessary to implement this request?

   a. List by position: position titles, pay grades, full or part-time status, benefit eligibility, anticipated dates of hire, and terms of service.

One (1) FTE, Bridge Coordinator, $35,000 each, Full Time, Full Benefits, Hire Date of August 1, 2018, 12 month contract.

Part-time instructors: $14,000 (total), part-time, no benefits, May 1, 2019, summer contract

Part-time tutors: $10,000 (total), part-time, no benefits, May 1, 2019, summer contract

b. Note any existing human resources that will be redirected to this new effort and how existing operations will be impacted.

We have an Associate Dean of Student Success in place. The Bridge Coordinator will report to Associate Dean of Student Success.

Part-time instructors will train with the college's instructional designer (in place). Math instructors will report to the Math Department Chair; bridge instructors will report to the Associate Dean of Student Success.

We currently have Academic Coaches in place. These coaches report to the Associate Dean of Student Success. We have limited tutors in place. Additional summer tutors will assist with the bridge program and will report to our Learning Assistance Program Coordinator (in place).

c. List any additional operating funds and capital items needed.

Financial Support to support students participating in the program. We anticipate 120 students (5 cohorts of 24).

Operating Supplies:

1) $29,000: Daily lunch with Student Success activities: 8 weeks, four days per week:

2) $10,000: Community Engaged Learning to include leadership, teamwork, service learning, and 21st Century skill development.

3) $8,000: Instructional support

4) $3,000: Office Supplies—marketing, promotion, general supplies

5) $2,000: travel

Faculty and staff Professional Development: $2,500

3. Provide additional detail about the request, including one-time versus ongoing. Include a description of major revenue assumptions, for example, whether there is a new customer base, fee structure changes, or anticipated grant awards.

   This request is for on-going funds to support new students entering the college.

4. Who is being served by this request and what are the expected impacts of the funding requested? If this request is not funded who and what are impacted?

The request is to enable first time, degree seeking students to have quicker progress into and successful completion of college math as well introducing students to the academic expectations of college. This program will develop 21st century skills that are essential in the classroom and in the workplace; promote community engaged learning; familiarize students to valuable campus resources to increase student success; foster social and academic relationships with peers, faculty, and staff; and provide academic coaching. We expect to see immediate results in retention and math completion rates. With continued support in subsequent semesters for bridge participants, CSI expects to see increased results in degree completion and graduation rates.

If this request is not funded, we will continue to run pilot programs serving small groups of students. This will refine the development of programs, but it will not have the desired major impact on increasing enrollments and completion rates.

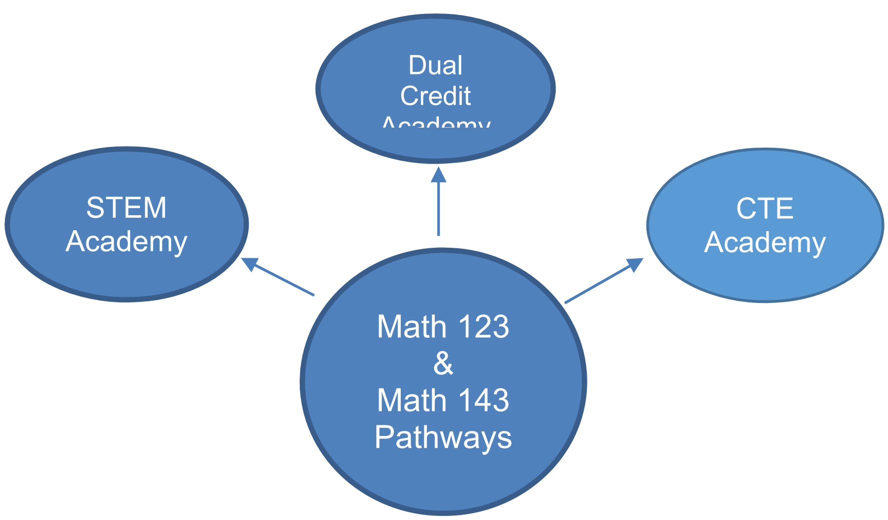
Decision Unit: Bridge to Success Summer Bridge Proposal

Science, technology, engineering, and math (STEM) degrees rank as the most popular degrees at the College of Southern Idaho (CSI). In the fall of 2015, for example, 23% of degree-seeking students declared a STEM degree as their major (College of Southern Idaho Information Technology Services, 2016). When Health Sciences and Career and Technical Education degrees and certificates are included in STEM, nearly half of CSI degree-seeking students declared a STEM degree in fall 2015.

Although nearly one-half of first time, degree seeking students at CSI select a STEM pathway, research indicates that many will leave their chosen field within the first academic year, if not sooner. Chen and Soldner (2013) found that 69% of associate's degree students who entered a STEM field in a six-year period (2003-2009) had left their chosen field. Roughly one-half of these students switched their major to a non-STEM degree; the remaining left college before earning a degree or certificate. Chen and Soldner indicated that performance in STEM courses, particularly math, figured prominently in a student's decision to leave the STEM field.

This request is to provide an intensive Bridge to Success Summer Bridge program that provides first time, degree-seeking students a head start in their transition to college. The program introduces students to the academic expectations of college, specifically for degrees that require challenging first-semester course work in math, since math is a key indicator of student success and degree completion. Moreover, the program develops 21st century skills that are essential in the classroom and in the workplace; promotes community engaged learning; familiarizes students to valuable campus resources to increase student success; fosters social and academic relationships with peers, faculty, and staff; and provides academic coaching. This request allows CSI to develop bridge academies that have math as their core course. This request involves hiring a full-time bridge coordinator, adjunct faculty to teach summer bridge courses, and tutors to provide summer bridge instructional support.

This summer bridge program will enable students to have quicker progress into and successful completion of college math. As a result, CSI expects to see immediate results in retention and math completion rates. With continued support in subsequent semesters for bridge participants, CSI expects to see increased results in degree completion and graduation rates.



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AGENCY: College of Southern Idaho	Agency No.: 501	FY 2018 Request
FUNCTION: Community College	Function No.: 02	Page ___ of __ Pages Original Submission _X_ or
ACTIVITY: Easter Idaho Faculty	Activity No.:	Revision No. ___

A: Decision Unit No: **12.03** Title: **CSI-Eastern Idaho Math & English Instructors** Priority Ranking 3 of 4

DESCRIPTION	**General**	**Dedicated**	**Federal**	**Other**	**Total**
FULL TIME POSITIONS (FTP)	2.00				2.0
PERSONNEL COSTS:					
1. Salaries	$88,000				$88,000
2. Benefits	41,900				41,900
3. Group Position Funding					
TOTAL PERSONNEL COSTS:	$129,900				$129,900
OPERATING EXPENDITURES **by summary object:**					
1. Travel					
TOTAL OPERATING EXPENDITURES:					
CAPITAL OUTLAY **by summary object:**					
1.					
TOTAL CAPITAL OUTLAY:					
T/B PAYMENTS:					
LUMP SUM:					
GRAND TOTAL	$129,900				$129,900

Supports institution/agency and Board strategic plans:

Goal 1 Objective B

Quality Instruction – Increase student access to general education gateway transfer courses in the Idaho Falls CSI Outreach Center by hiring full-time instructors (1.0 FTE English and 1.0 FTE mathematics).

Performance Measure:

1. To provide instruction in gateway transfer general education courses in English and mathematics at the CSI Outreach Center in Idaho Falls.

2. Full-time faculty described above will improve access and mentoring for dual credit students and adjunct teachers at the CSI Outreach Center in Idaho Falls.

Description:

The instructional positions would allow two full time dedicated faculty to be located at the CSI's Eastern Idaho outreach center in Idaho Falls. Enrollment in college-level General Education courses, especially in English and mathematics, has grown significantly since the center opened in 2012. As of AY 15-16 there were 229 enrollments in English and 163 enrollments in mathematics. A full-time faculty load is 15 credits. Additionally, full time faculty members not only teach a full load but also function as advisors, and working with departments on the main campus, these faculty members would also be responsible to advise and mentor adjunct and dual credit instructors in Bannock and Bonneville Counties who teach for CSI.

The CSI Outreach Center in Idaho Falls was funded to provide general education courses that Eastern Idaho Technical College is unable to offer due to its mission and funding as a CTE technical college. Last year the governor committed funds towards the creation of a community college in Eastern Idaho, and a citizen's committee has been at work for the past year to develop the proposal. When EITC becomes a community college, it is our intention that the CSI positions requested here would convert immediately over to the new Eastern Idaho Community College as full time English and mathematics faculty, and the funding for these positions would transfer over to the new community college. Until such time as the new community college is created, these positions will serve the growing number of students who are using the CSI Outreach Center in Idaho Falls to take lower division general education courses locally at an affordable price.

Questions:

1. What is being requested and why? What is the agency staffing level for this activity and how much funding by source is in the base?

   Two (2) FTE are being requested to a) provide full time access to students enrolled in math and English classes, b) develop and maintain an ongoing excellence in teaching protocol for all full and part-time faculties, and c) work with the growing number of adjunct and dual credit teachers and students in Bonneville and Bannock counties.

2. What resources are necessary to implement this request?

   a. List by position: position titles, pay grades, full or part-time status, benefit eligibility, anticipated dates of hire, and terms of service.

      Two (2) FTE, Faculty, $44,000 each, Full Time, Full Benefits, Hire Date of August 1, 2018, 10-month contract.

b. Note any existing human resources that will be redirected to this new effort and how existing operations will be impacted.

   New instructors will report to the appropriate department chairs and instructional deans in the office of Instructional Affairs on the main CSI campus in Twin Falls and will work closely with the Director of the Eastern Idaho Outreach Center.

c. List any additional operating funds and capital items needed.

   No Additional funds are being requested

3. Provide additional detail about the request, including one-time versus ongoing. Include a description of major revenue assumptions, for example, whether there is a new customer base, fee structure changes, or anticipated grant awards.

   This is an ongoing request for salary and benefits. When Eastern Idaho Technical College converts to a community college and then is able to offer general education courses and transfer degrees, these positions (and the funding for them) would transfer immediately over to the new community college as the CSI Center in Idaho Falls would no longer be needed.

4. Who is being served by this request and what are the expected impacts of the funding requested? If this request is not funded who and what are impacted?

   The students taking general education courses in English and mathematics through CSI at its Eastern Idaho Outreach Center would directly benefit from full-time instructors; moreover, adjunct and dual credit instructors and students in Bonneville and Bannock Counties will benefit from consistent, local mentoring, advising, and direction from full-time faculty in the key areas of English and mathematics.

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AGENCY: College of Southern Idaho	Agency No.:	FY 2018 Request
FUNCTION: Community College	Function No.:	Page ___ of __ Pages
ACTIVITY: Embedded Dual Credit Academy	Activity No.:	Original Submission _X_ or Revision No. ___

A: Decision Unit No: **12.04**	Title: **Embedded Dual Credit Academy Instructors**			Priority Ranking 4 of 4	
DESCRIPTION	**General**	**Dedicated**	**Federal**	**Other**	**Total**
FULL TIME POSITIONS (FTP)	2.0				2.0
PERSONNEL COSTS:					
1. Salaries	$84,000				$84,000
2. Benefits	41,000				41,000
3. Group Position Funding					
TOTAL PERSONNEL COSTS:	$125,000				$125,000
OPERATING EXPENDITURES **by summary object:**					
1. Travel	$3,500				$3,500
2. Instructional supplies	4,000				4,000
TOTAL OPERATING EXPENDITURES:	$7,500				$7,500
CAPITAL OUTLAY **by summary object:**					
1. Laptop computers	$3,600				$3,500
TOTAL CAPITAL OUTLAY:	$3,600				$3,600
T/B PAYMENTS:					
LUMP SUM:					
GRAND TOTAL	$136,100				$136,100

Supports institution/agency and Board strategic plans:

CSI Core Theme 1: Community Success

As a community college, we are committed to responding to the diverse needs of the communities we serve and to taking a leadership role in improving the quality of life of the members of those communities.

Objective #3: Meet the workforce needs of the communities we serve

Core Theme 2: Student Success

As an institution of higher education, we exist to meet the diverse educational needs of the communities we serve. Above all institutional priorities is the desire for every student to experience success in the pursuit of a quality education.

- Objective #1: Foster participation in post-secondary education
- Objective #2: Reinforce a commitment to instructional excellence
- Objective #3: Support student progress toward achievement of educational goals

Performance Measure:
Increase participation in dual credit pathways in Business and Computer Science.

Description:
This request is intended to continue the CSI strategy of providing direct instructional and support services within the secondary education system in Region IV. By placing CSI faculty in high school classrooms, there is absolute connection and integration of the dual credit/early college strategy between the College and the district. In this particular case, Business and Computer Science faculty will be hired and based on regional need and capacity, placed directly within those schools with an established pathway to Associate Degrees which are in turn articulated with Idaho State University and other Idaho public colleges and universities. These instructors will create dual credit "Academies," which are exemplars within the High Schools That Work research regarding excellence in secondary education.

Questions:

1. What is being requested and why? What is the agency staffing level for this activity and how much funding by source is in the base?
   Faculty and attendant instructional costs to implement a minimum of two dual credit academies.
2. What resources are necessary to implement this request?
   a. List by position: position titles, pay grades, full or part-time status, benefit eligibility, anticipated dates of hire, and terms of service.
   Two full time college faculty (9 month) on full benefits, hired effective for Fall term 2017.
   b. Note any existing human resources that will be redirected to this new effort and how existing operations will be impacted.
   No redirection, but additional supervisory responsibilities for the respective department chairs.
   c. List any additional operating funds and capital items needed.
3. Provide additional detail about the request, including one-time versus ongoing. Include a description of major revenue assumptions, for example, whether there is a new customer base, fee structure changes, or anticipated grant awards.

Dual credit revenue will be collected and applied to operational costs beyond those of the direct instruction. This is an ongoing request to CSI base funding.

4. Who is being served by this request and what are the expected impacts of the funding requested? If this request is not funded who and what are impacted?

   High schools, their students, their parents and our regional business and industry partners. If this request is not funded, the opportunity for greater instructional integration with regard to dual credit/middle college will be lost or significantly mitigated.

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AGENCY: North Idaho College	Agency No.: 501	FY 2018 Request
FUNCTION: Community College	Function No.: 02	Page 1 of 3 Pages
ACTIVITY: Board approved category	Activity No.:	Original Submission _X_ or Revision No. ___

A: Decision Unit No: **12.01**	Title: **Idaho Summer Completion Initiative**				Priority Ranking 1 of 4
DESCRIPTION	**General**	**Dedicated**	**Federal**	**Other**	**Total**
FULL TIME POSITIONS (FTP)	0.00				1.0
PERSONNEL COSTS:					
1. Salaries	0.00				0
2. Benefits	$94,900				$94,900
3. Group Position Funding	500,000				500,000
TOTAL PERSONNEL COSTS:	$594,900				$594,900
OPERATING EXPENDITURES **by summary object:**					
1. Travel	0				0
TOTAL OPERATING EXPENDITURES:	0				0
CAPITAL OUTLAY **by summary object:**					
1. PC and workstation	0				0
TOTAL CAPITAL OUTLAY:	0				0
T/B PAYMENTS:					
LUMP SUM:					
GRAND TOTAL	$594,900				$594,900

Supports institution/agency and Board strategic plans:

Goal 1, Objective 3:
Student Success: Promote programs and services to enhance access and successful student transitions.

Goal 2, Objective 1:
Educational Excellence: Evaluate, create and adapt programs that respond to the educational and training needs of the region.

Performance Measures:

- Percentage of full-time, first-time and new transfer-in students who a) were awarded a degree or certificate, b) transferred without an award to a 2- or 4-year institution, c) are still enrolled, and d) left the institution within six years.

- Fall to Spring Persistence Rate, credit students.
- First-time, full-time, student retention rates.
- First-time, part-time, student retention rates.
- Increase dual credit students who enroll at NIC as degree-seeking postsecondary students as a percentage of total headcount.

Description:

The Idaho Summer Completion Initiative enables any Idaho resident to attend North Idaho College tuition free for the Summer 2017 term for up to 6 credit hours.

The purpose of this initiative is to leverage the summer term to increase retention and completion rates and create an opportunity for former students who are missing a handful of credits to achieve degree completion.

Over the past decade North Idaho College along with many other institutions across the nation have seen a significant decline in credit taking behaviors over the summer terms. This change in credit taking behavior has had an impact on both retention and completion results. Furthermore, the reduction in summer credits has impacted the overall operating efficiency of the campus, since the campus is still operating during the summer months but with much reduced student offerings.

By encouraging students to take credits during the summer, we as an institution are better able to maintain connection with our students and increase persistence of current students from spring semester to fall semester. In addition, taking even one course during the summer term reduces the overall time to completion. A tuition free summer term allows the institution a unique opportunity to reach out to students who are a few credits short completing their degree or certificate and provide access over the summer for these students to complete and graduate. The tuition free summer term also provides a great bridge for dual credit students and graduating seniors to further experience the college learning environment and gain credits further reducing their time to degree completion, regardless of where they choose to complete their post- secondary studies.

Questions:

1. What is being requested and why? What is the agency staffing level for this activity and how much funding by source is in the base?

2. What resources are necessary to implement this request?

a. All courses will be taught by current North Idaho College accepting summer assignments on a per credit basis or by adjunct faculty accepting summer assignments on a per credit basis.

b. There will be no existing human resources that will be redirected to this new effort. Existing operations will be impacted to enroll and register students but can be accommodated using existing staff and systems.

c. There are no additional operating funds and capital items needed.

3. This request is a one-time funding request. This request is based on offering 200 three credit instructional sections in Summer 2017 tuition free to any Idaho resident. This will serve an estimated 4,000 Idaho students (duplicated head-count). Courses offered tuition free would be delivered as face to face, via IVC, or in a hybrid modality. Courses offered completely on-line would be ineligible for this program. Students would be responsible for any lab fee/course fee and any required textbook. This would be the only out of pocket expenses to students.

This request would potentially serve all interested students across the state of Idaho. The immediate effects of this funding will be improved completion rates at North Idaho College and a reduced time to degree for any students who take advantage of the summer completion initiative.

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AGENCY: North Idaho College	Agency No.: 501	FY 2018 Request
FUNCTION: Community College	Function No.: 02	Page 1 of 3 Pages
ACTIVITY: Board approved category	Activity No.:	Original Submission _X_ or Revision No. ___

A: Decision Unit No: **12.01**	Title: **Title IX Coordinator**			Priority Ranking 2 of 4	
DESCRIPTION	**General**	**Dedicated**	**Federal**	**Other**	**Total**
FULL TIME POSITIONS (FTP)	1.00				1.0
PERSONNEL COSTS:					
1. Salaries	$60,000				$60,000
2. Benefits	24,700				24,700
3. Group Position Funding					
TOTAL PERSONNEL COSTS:	$84,700				$84,700
OPERATING EXPENDITURES **by summary object:**					
1. Travel	$2,000				$2,000
TOTAL OPERATING EXPENDITURES:	$2,000				$2,000
CAPITAL OUTLAY **by summary object:**					
1. PC and workstation	$3,000				$3,000
TOTAL CAPITAL OUTLAY:	$3,000				$3,000
T/B PAYMENTS:					
LUMP SUM:					
GRAND TOTAL	$89,700				$89,700

Supports institution/agency and Board strategic plans:

Goal 1, Objective 1:
Student Success: Provide innovative, progressive, and student-centered programs and services.

Goal 4, Objective 4:
Diversity: Promote a safe and respectful environment.

Performance Measures:
- Fall to Spring Persistence Rate, credit students.
- Participation in sponsored events that promote Title IX awareness.

Description:

Establishing the position of Title IX Coordinator as a FT position to lead the college's compliance efforts and conduct training and awareness events for students, faculty and staff and the community.

The purpose of this initiative is to ensure compliance with the fast changing and expanding requirements of Title IX.

Title IX has required all colleges to respond differently and more proactively to reports of sexual assault or any other forms of sex based discrimination. Title IX applies to all institutions that receive federal financial assistance. Title IX requires that institutions operate all programs and activities in a non-discriminatory manner including recruitment, admissions, and counseling; financial assistance; athletics; sex-based harassment; treatment of pregnant and parenting students; discipline; single-sex education; and employment. Recently the focus of Office of Civil Right enforcement efforts have increased and become more focused on institutional responses to investigation of sexual harassment and assault.

The addition of a dedicated Title IX Coordinator will allow the institution to meet its federally mandated responsibilities related to Title IX compliance, including being proactive in the continued development of processes and procedures to ensure compliance and better educate all stakeholders on awareness and prevention of sex-based discrimination and sexual assault. The addition of the Title IX Coordinator will also allow the institution to meet the expectations of the Office of Civil Rights. The Office of Civil Rights has issued much guidance on the designation of Title IX coordinators, going so far as to indicate that the federal preference is that institutions have a dedicated, full-time Title IX Coordinator to "minimize the risk of a conflict of interest and in many cases ensure sufficient time is available to perform all the role's responsibilities." (See the attached Office of Civil Rights "Dear Colleague Letter on Title IX Coordinators" dated April 25, 2015).

Questions:

1. The institution is requesting the addition of 1 FTE. Current staffing for these functions is staffed by 2 employees equaling a .5 FTE. This is requested as ongoing, general fund (base) support.
2. What resources are necessary to implement this request?
   a. Title IX Coordinator. Full Time Benefited Position. Anticipated date of hire: 7/1/17.
   b. Currently the college has two employees working on Title IX equating to .5 FTE. These individuals will continue their support role as investigators for Title IX complaints.

c. Operating funds of $2,000 are requested for travel and training for continuing staff development. Capital items needed consist of initial IT and workspace needs of $3,000.

3. The staffing request and operating request are on-going in the amount of $81,800. Capital request of $3,000 is one-time.
4. This request will serve all students, faculty, staff and visitors to North Idaho College. If this request is not funded the college will continue to support Title IX compliance with the existing dedicated .5 FTE and seek additional fee revenue to support Title IX compliance funded by students.

UNITED STATES DEPARTMENT OF EDUCATION

OFFICE FOR CIVIL RIGHTS

THE ASSISTANT SECRETARY

April 24, 2015

Dear Colleague:

I write to remind you that all school districts, colleges, and universities receiving Federal financial assistance must designate at least one employee to coordinate their efforts to comply with and carry out their responsibilities under Title IX of the Education Amendments of 1972 (Title IX), which prohibits sex discrimination in education programs and activities.[1] These designated employees are generally referred to as Title IX coordinators.

Your Title IX coordinator plays an essential role in helping you ensure that every person affected by the operations of your educational institution—including students, their parents or guardians, employees, and applicants for admission and employment—is aware of the legal rights Title IX affords and that your institution and its officials comply with their legal obligations under Title IX. To be effective, a Title IX coordinator must have the full support of your institution. It is therefore critical that all institutions provide their Title IX coordinators with the appropriate authority and support necessary for them to carry out their duties and use their expertise to help their institutions comply with Title IX.

The U.S. Department of Education's Office for Civil Rights (OCR) enforces Title IX for institutions that receive funds from the Department (recipients).[2] In our enforcement work, OCR has found that some of the most egregious and harmful Title IX violations occur when a recipient fails to designate a Title IX coordinator or when a Title IX coordinator has not been sufficiently trained or given the appropriate level of authority to oversee the recipient's compliance with Title IX. By contrast, OCR has found that an effective Title IX coordinator often helps a recipient provide equal educational opportunities to all students.

OCR has previously issued guidance documents that include discussions of the responsibilities of a Title IX coordinator, and those documents remain in full force. This letter incorporates that existing OCR guidance on Title IX coordinators and provides additional clarification and recommendations

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[1] 34 C.F.R. § 106.8(a). Although Title IX applies to any recipient that offers education programs or activities, this letter focuses on Title IX coordinators designated by local educational agencies, schools, colleges, and universities.

[2] 20 U.S.C. §§ 1681–1688. The Department of Justice shares enforcement authority over Title IX with OCR.

as appropriate. This letter outlines the factors a recipient should consider when designating a Title IX coordinator, then describes the Title IX coordinator's responsibilities and authority. Next, this letter reminds recipients of the importance of supporting Title IX coordinators by ensuring that the coordinators are visible in their school communities and have the appropriate training.

Also attached is a letter directed to Title IX coordinators that provides more information about their responsibilities and a Title IX resource guide. The resource guide includes an overview of the scope of Title IX, a discussion about Title IX's administrative requirements, as well as a discussion of other key Title IX issues and references to Federal resources. The discussion of each Title IX issue includes recommended best practices for the Title IX coordinator to help your institution meet its obligations under Title IX. The resource guide also explains your institution's obligation to report information to the Department that could be relevant to Title IX. The enclosed letter to Title IX coordinators and the resource guide may be useful for you to understand your institution's obligations under Title IX.

Designation of a Title IX Coordinator

Educational institutions that receive Federal financial assistance are prohibited under Title IX from subjecting any person to discrimination on the basis of sex. Title IX authorizes the Department of Education to issue regulations to effectuate Title IX.[3] Under those regulations, a recipient must designate at least one employee to coordinate its efforts to comply with and carry out its responsibilities under Title IX and the Department's implementing regulations.[4] This position may not be left vacant; a recipient must have at least one person designated and actually serving as the Title IX coordinator at all times.

In deciding to which senior school official the Title IX coordinator should report and what other functions (if any) that person should perform, recipients are urged to consider the following:[5]

A. Independence

The Title IX coordinator's role should be independent to avoid any potential conflicts of interest and the Title IX coordinator should report directly to the recipient's senior leadership, such as the district superintendent or the college or university president. Granting the Title IX coordinator this

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[3] The Department's Title IX regulations, 34 C.F.R. Part 106, are available at http://www.ed.gov/policy/rights/reg/ocr/edlite-34cfr106.html.

[4] 34 C.F.R. § 106.8(a).

[5] Many of the principles in this document also apply generally to employees required to be designated to coordinate compliance with other civil rights laws enforced by OCR against educational institutions, such as Section 504 of the Rehabilitation Act of 1973, 29 U.S.C. § 794; 34 C.F.R. § 104.7(a), and Title II of the Americans with Disabilities Act of 1990, 42 U.S.C. §§ 12131–12134; 28 C.F.R. § 35.107(a).

independence also ensures that senior school officials are fully informed of any Title IX issues that arise and that the Title IX coordinator has the appropriate authority, both formal and informal, to effectively coordinate the recipient's compliance with Title IX. Title IX does not categorically exclude particular employees from serving as Title IX coordinators. However, when designating a Title IX coordinator, a recipient should be careful to avoid designating an employee whose other job responsibilities may create a conflict of interest. For example, designating a disciplinary board member, general counsel, dean of students, superintendent, principal, or athletics director as the Title IX coordinator may pose a conflict of interest.

B. Full-Time Title IX Coordinator

Designating a full-time Title IX coordinator will minimize the risk of a conflict of interest and in many cases ensure sufficient time is available to perform all the role's responsibilities. If a recipient designates one employee to coordinate the recipient's compliance with Title IX and other related laws, it is critical that the employee has the qualifications, training, authority, and time to address all complaints throughout the institution, including those raising Title IX issues.

C. Multiple Coordinators

Although not required by Title IX, it may be a good practice for some recipients, particularly larger school districts, colleges, and universities, to designate multiple Title IX coordinators. For example, some recipients have found that designating a Title IX coordinator for each building, school, or campus provides students and staff with more familiarity with the Title IX coordinator. This familiarity may result in more effective training of the school community on their rights and obligations under Title IX and improved reporting of incidents under Title IX. A recipient that designates multiple coordinators should designate one lead Title IX coordinator who has ultimate oversight responsibility. A recipient should encourage all of its Title IX coordinators to work together to ensure consistent enforcement of its policies and Title IX.

Responsibilities and Authority of a Title IX Coordinator

The Title IX coordinator's primary responsibility is to coordinate the recipient's compliance with Title IX, including the recipient's grievance procedures for resolving Title IX complaints. Therefore, the Title IX coordinator must have the authority necessary to fulfill this coordination responsibility. The recipient must inform the Title IX coordinator of all reports and complaints raising Title IX issues, even if the complaint was initially filed with another individual or office or the investigation will be conducted by another individual or office. The Title IX coordinator is responsible for coordinating the recipient's responses to all complaints involving possible sex discrimination. This responsibility includes monitoring outcomes, identifying and addressing any patterns, and assessing effects on the campus climate. Such coordination can help the recipient avoid Title IX violations, particularly violations involving sexual harassment and violence, by preventing incidents from recurring or becoming systemic problems that affect the wider school community. Title IX does not specify who should determine the outcome of Title IX complaints or the actions the school will take in response to such complaints. The Title IX coordinator could play this role, provided there are no conflicts of interest, but does not have to.

The Title IX coordinator must have knowledge of the recipient's policies and procedures on sex discrimination and should be involved in the drafting and revision of such policies and procedures to help ensure that they comply with the requirements of Title IX. The Title IX coordinator should also coordinate the collection and analysis of information from an annual climate survey if, as OCR recommends, the school conducts such a survey. In addition, a recipient should provide Title IX coordinators with access to information regarding enrollment in particular subject areas, participation in athletics, administration of school discipline, and incidents of sex-based harassment. Granting Title IX coordinators the appropriate authority will allow them to identify and proactively address issues related to possible sex discrimination as they arise.

Title IX makes it unlawful to retaliate against individuals—including Title IX coordinators—not just when they file a complaint alleging a violation of Title IX, but also when they participate in a Title IX investigation, hearing, or proceeding, or advocate for others' Title IX rights.[6] Title IX's broad anti-retaliation provision protects Title IX coordinators from discrimination, intimidation, threats, and coercion for the purpose of interfering with the performance of their job responsibilities. A recipient, therefore, must not interfere with the Title IX coordinator's participation in complaint investigations and monitoring of the recipient's efforts to comply with and carry out its responsibilities under Title IX. Rather, a recipient should encourage its Title IX coordinator to help it comply with Title IX and promote gender equity in education.

Support for Title IX Coordinators

Title IX coordinators must have the full support of their institutions to be able to effectively coordinate the recipient's compliance with Title IX. Such support includes making the role of the Title IX coordinator visible in the school community and ensuring that the Title IX coordinator is sufficiently knowledgeable about Title IX and the recipient's policies and procedures. Because educational institutions vary in size and educational level, there are a variety of ways in which recipients can ensure that their Title IX coordinators have community-wide visibility and comprehensive knowledge and training.

[6] 34 C.F.R. § 106.71 (incorporating by reference 34 C.F.R. § 100.7(e)).

A. Visibility of Title IX Coordinators

Under the Department's Title IX regulations, a recipient has specific obligations to make the role of its Title IX coordinator visible to the school community. A recipient must post a notice of nondiscrimination stating that it does not discriminate on the basis of sex and that questions regarding Title IX may be referred to the recipient's Title IX coordinator or to OCR. The notice must be included in any bulletins, announcements, publications, catalogs, application forms, or recruitment materials distributed to the school community, including all applicants for admission and employment, students and parents or guardians of elementary and secondary school students, employees, sources of referral of applicants for admission and employment, and all unions or professional organizations holding collective bargaining or professional agreements with the recipient.[7]

In addition, the recipient must always notify students and employees of the name, office address, telephone number, and email address of the Title IX coordinator, including in its notice of nondiscrimination.[8] Because it may be unduly burdensome for a recipient to republish printed materials that include the Title IX coordinator's name and individual information each time a person leaves the Title IX coordinator position, a recipient may identify its coordinator only through a position title in printed materials and may provide an email address established for the position of the Title IX coordinator, such as TitleIXCoordinator@school.edu, so long as the email is immediately redirected to the employee serving as the Title IX coordinator. However, the recipient's website must reflect complete and current information about the Title IX coordinator.

Recipients with more than one Title IX coordinator must notify students and employees of the lead Title IX coordinator's contact information in its notice of nondiscrimination, and should make available the contact information for its other Title IX coordinators as well. In doing so, recipients should include any additional information that would help students and employees identify which Title IX coordinator to contact, such as each Title IX coordinator's specific geographic region (*e.g.*, a particular elementary school or part of a college campus) or Title IX area of specialization (*e.g.*, gender equity in academic programs or athletics, harassment, or complaints from employees).

The Title IX coordinator's contact information must be widely distributed and should be easily found on the recipient's website and in various publications.[9] By publicizing the functions and responsibilities of the Title IX coordinator, the recipient demonstrates to the school community its commitment to complying with Title IX and its support of the Title IX coordinator's efforts.

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[7] 34 C.F.R. § 106.9.

[8] 34 C.F.R. § 106.8(a).

[9] 34 C.F.R. § 106.9.

Supporting the Title IX coordinator in the establishment and maintenance of a strong and visible role in the community helps to ensure that members of the school community know and trust that they can reach out to the Title IX coordinator for assistance. OCR encourages recipients to create a page on the recipient's website that includes the name and contact information of its Title IX coordinator(s), relevant Title IX policies and grievance procedures, and other resources related to Title IX compliance and gender equity. A link to this page should be prominently displayed on the recipient's homepage.

To supplement the recipient's notification obligations, the Department collects and publishes information from educational institutions about the employees they designate as Title IX coordinators. OCR's Civil Rights Data Collection (CRDC) collects information from the nation's public school districts and elementary and secondary schools, including whether they have civil rights coordinators for discrimination on the basis of sex, race, and disability, and the coordinators' contact information.[10] The Department's Office of Postsecondary Education collects information about Title IX coordinators from postsecondary institutions in reports required under the Jeanne Clery Disclosure of Campus Security Policy and Campus Crime Statistics Act and the Higher Education Opportunity Act.[11]

B. Training of Title IX Coordinators

Recipients must ensure that their Title IX coordinators are appropriately trained and possess comprehensive knowledge in all areas over which they have responsibility in order to effectively carry out those responsibilities, including the recipients' policies and procedures on sex discrimination and all complaints raising Title IX issues throughout the institution. The resource guide accompanying this letter outlines some of the key issues covered by Title IX and provides references to Federal resources related to those issues. In addition, the coordinators should be knowledgeable about other applicable Federal and State laws, regulations, and policies that overlap with Title IX.[12] In most cases, the recipient will need to provide an employee with training to act as its Title IX coordinator. The training should explain the different facets of Title IX, including regulatory provisions, applicable OCR guidance, and the recipient's Title IX policies and grievance procedures. Because these laws, regulations, and OCR guidance may be updated, and

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[10] OCR began collecting this information through the CRDC for the 2013-2014 school year. More information about the CRDC is available at http://www.ed.gov/ocr/data.html.

[11] The Department will begin collecting this information in 2015. More information about the Clery Act data collection is available at http://www.ed.gov/admins/lead/safety/campus.html.

[12] *See, e.g.*, the Family Educational Rights and Privacy Act, 20 U.S.C. §1232g, and its implementing regulations, 34 C.F.R. Part 99; and the Clery Act, 20 U.S.C. § 1092(f), and its implementing regulations, 34 C.F.R. Part 668. These documents only address an institution's compliance with Title IX and do not address its obligations under other Federal laws, such as the Clery Act.

recipient policies and procedures may be revised, the best way to ensure Title IX coordinators have the most current knowledge of Federal and State laws, regulations, and policies relating to Title IX and gender equity is for a recipient to provide regular training to the Title IX coordinator, as well as to all employees whose responsibilities may relate to the recipient's obligations under Title IX. OCR's regional offices can provide technical assistance, and opportunities for training may be available through Equity Assistance Centers, State educational agencies, private organizations, advocacy groups, and community colleges. A Title IX coordinator may also find it helpful to seek mentorship from a more experienced Title IX coordinator and to collaborate with other Title IX coordinators in the region (or who serve similar institutions) to share information, knowledge, and expertise.

In rare circumstances, an employee's prior training and experience may sufficiently prepare that employee to act as the recipient's Title IX coordinator. For example, the combination of effective prior training and experience investigating complaints of sex discrimination, together with training on current Title IX regulations, OCR guidance, and the recipient institution's policies and grievance procedures may be sufficient preparation for that employee to effectively carry out the responsibilities of the Title IX coordinator.

Conclusion

Title IX coordinators are invaluable resources to recipients and students at all educational levels. OCR is committed to helping recipients and Title IX coordinators understand and comply with their legal obligations under Title IX. If you need technical assistance, please contact the OCR regional office serving your State or territory by visiting http://wdcrobcolp01.ed.gov/CFAPPS/OCR/contactus.cfm or call OCR's Customer Service Team at 1-800-421-3481; TDD 1-800-877-8339.

Thank you for supporting your Title IX coordinators to help ensure that all students have equal access to educational opportunities, regardless of sex. I look forward to continuing to work with recipients nationwide to help ensure that each and every recipient has at least one knowledgeable Title IX coordinator with the authority and support needed to prevent and address sex discrimination in our nation's schools.

Sincerely,

/s/
Catherine E. Lhamon
Assistant Secretary for Civil Rights

AGENCY: North Idaho College	Agency No.: 501	FY 2018 Request
FUNCTION: Community College	Function No.: 02	Page 1 of 3 Pages
ACTIVITY: Board approved category	Activity No.:	Original Submission _X_ or Revision No. ___

A: Decision Unit No: **12.01**	Title: **Assistive Technology Coordinator**				Priority Ranking 3 of 4
DESCRIPTION	**General**	**Dedicated**	**Federal**	**Other**	**Total**
FULL TIME POSITIONS (FTP)	1.00				1.0
PERSONNEL COSTS:					
1. Salaries	$49,000				$49,000
2. Benefits	22,400				22,400
3. Group Position Funding					
TOTAL PERSONNEL COSTS:	$71,400				$71,400
OPERATING EXPENDITURES **by summary object:**					
1. Travel, Training, Association Memberships	$7,000				$7,000
2. Captioning Services	500,000				500,000
TOTAL OPERATING EXPENDITURES:	$507,000				$507,000
CAPITAL OUTLAY **by summary object:**					
1. PC and workstation	$2,000				$2,000
2. Remodel of Seiter Hall Office Space	10,000				10,000
3. Network Software and other System Compliance.	62,000				62,000
4. Hardware Compliance.	54,000				54,000
TOTAL CAPITAL OUTLAY:	$128,000				$128,000
T/B PAYMENTS:					
LUMP SUM:					
GRAND TOTAL	$706,400				$706,400

Supports institution/agency and Board strategic plans:

Goal 1, Objective 3:
Student Success: Promote programs and services to enhance access and successful transitions.

Goal 4, Objective 1:
Diversity: Foster a culture of inclusion.

Performance Measures:

- Number of students enrolled from diverse populations.
- Participation in sponsored events that promote Title IX awareness.
- Percentage of full-time, first-time and new transfer-in students who a) were awarded a degree or certificate, b) transferred without an award to a 2- or 4-year institution, c) are still enrolled, and d) left the institution within six years.
- Fall to Spring Persistence Rate, credit students

Description:

In order to meet compliance with Electronic and Information Technology requirements and standards, the institution needs to dedicate resources and establish a coordinator to ensure all media produced by the college is in compliance and students with assistive technology accommodations are provided the appropriate support.

The Department of Education, Office for Civil Rights is widely publicizing the recent May 4, 2012 University of Montana Electronic and Information Technology (EIT) compliance complaint against the institution. The Office for Civil Rights is reminding all post-secondary institutions that the remedial actions against the University of Montana should be viewed as a template to insure colleges are in compliance with EIT requirements and standards.

After reviewing the Department of Education, Office for Civil Rights Resolution Agreement with the University of Montana, NIC has recognized the need to designate/hire an assistive technology coordinator. This individual will oversee, coordinate, and provide consulting, training and support for students, faculty, and staff in using assistive technologies. Develop, implement, and maintain procedures and objectives, lead short and long range planning; collaborate with other program staff in strategic planning, cultivation of partnerships, and development and implementation of programmatic initiatives related to assistive technologies. Provides training and documentation in accessibility issues for university community members.

NIC has already identified several deficit areas through past audit activity including the need to install web content compliance software, purchase a campus wide licensing for text to speech software system, upgrade computer kiosks, information stations, copiers, learning management systems including classroom technology and multimedia, phone systems, and also provide captioning of videos and film content to insure accessibility for students with disabilities is adequately addressed. Additionally the Assistive Technology Coordinator would be responsible for identifying additional funding sources and grants to ensure continued electronic and information tech compliance across all NIC campuses and platforms.

Questions:

1. The institution is requesting the addition of 1 FTE. This is requested as ongoing, general fund (base) support. In addition the institution is requesting $507,000 in ongoing support for the position and accommodate immediate captioning needs.
2. What resources are necessary to implement this request?
    a. Assistive Technology Coordinator. Full Time Benefited Position. Anticipated date of hire: 7/1/17.
    b. Currently the college has no employees working specifically on EIT compliance.
    c. Operating funds of $507,000 are requested for travel and training for continuing staff development and for the immediate captioning needs of the institution. Capital items needed consist of initial IT and hardware and software in the amount of $128,000. This includes: HiSoftware Compliance Sheriff for Web Content Compliance Automation, ($32,000); Campus-Wide Speech to Text Software Licensing Software Read/Write Gold ($12,000); Transcription Costs for Video and Film Captioning ($18,000); Access Kiosk Computer Replacements ($18,000); Student Disability Multimedia Computer Stations upgrades for 7 sites ($21,000); Blind and Visually Impaired Assistive Technology Lab to include 3-D printing for Tactile accommodation ($15,000).
3. The staffing request and operating request are on-going in the amount of $572,170. Capital request of $128,000 is one-time.
4. This request would potentially serve all students, faculty, staff and visitors to North Idaho College. If this request is not funded the college will continue to seek funding sources to meet the compliance requirements for Electronic and Information Technology requirements.

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AGENCY: North Idaho College	Agency No.: 501	FY 2018 Request
FUNCTION: Community College	Function No.: 02	Page 1 of 3 Pages
ACTIVITY: Board approved category	Activity No.:	Original Submission _X_ or Revision No. ___

A: Decision Unit No: **12.01**	Title: **College and Career Navigators**				Priority Ranking 4 of 4
DESCRIPTION	**General**	**Dedicated**	**Federal**	**Other**	**Total**
FULL TIME POSITIONS (FTP)	3.00				3.0
PERSONNEL COSTS:					
1. Salaries	$155,000				$155,000
2. Benefits	69,000				69,000
3. Group Position Funding					
TOTAL PERSONNEL COSTS:	$224,000				$224,000
OPERATING EXPENDITURES **by summary object:**					
1. Travel	$15,000				$15,000
TOTAL OPERATING EXPENDITURES:	$15,000				$15,000
CAPITAL OUTLAY **by summary object:**					
1. PC and workstation	$6,000				$6,000
2. Vehicle	90,000				90,000
TOTAL CAPITAL OUTLAY:	$96,000				$96,000
T/B PAYMENTS:					
LUMP SUM:					
GRAND TOTAL	$335,000				$335,000

Supports institution/agency and Board strategic plans:

Goal 1, Objective 2:
Student Success: Engage and empower students to take personal responsibility and to actively participate in their educational experience.

Goal 1, Objective 3:
Student Success: Promote programs and services to enhance access and successful student transitions.

Goal 3, Objective 3:
Community Engagement: Promote North Idaho College in the communities we serve.

Performance Measures:

- Percentage of full-time, first-time and new transfer-in students who a) were awarded a degree or certificate, b) transferred without an award to a 2- or 4-year institution, c) are still enrolled, and d) left the institution within six years.
- Fall to Spring Persistence Rate, credit students.
- First-time, full-time, student retention rates.
- First-time, part-time, student retention rates.
- Increase dual credit students who enroll at NIC as degree-seeking postsecondary students as a percentage of total headcount.
- Market Penetration (Credit Students): Unduplicated headcount of credit students as a percentage of NIC's total service area population

Description:

College and Career Navigator will engage students in their schools beginning in the 7th grade and then in specific intervals as students' progress into high school, begin taking dual credit courses and then transition into higher education.

The purpose of this initiative is for early intervention with students to ensure they are considering higher education for themselves as they look to their future, set goals and chart their coursework in high school. By engaging students in the 7th grade and providing career aptitude testing to help students find their interests and strengths, navigators can continue the conversations with students and their families and start the conversations early that higher education is achievable and absolutely necessary and comes in many forms from technical certificates and credentials to a bachelor's degree.

One of the consistent concerns of many stakeholders is that as a state we are not reaching students early enough and having meaningful conversations about student interests and strengths and how that translates into finding the right career and the absolute necessity for some form of higher education. This model will allow North Idaho College to pilot this across Kootenai County and track the impact for six years – from the 7th grade class of 2017-2018 to the entering college freshman class in Fall 2023.

The key aspects of this initiative will provide career aptitude testing to every interested seventh grader in Kootenai County and guidance to students in interpreting the results and developing an initial plan for higher education along with specific targeted follow-up and resources at key points as the students' progress through high school. In addition, these navigators will be the key relationship and contact with students as they have questions about dual credit, guided pathways, financial aid and the transition to an institution of higher education.

The college and career navigators will be an essential link to not just North Idaho College, but to all colleges and serve as a trusted advisor to students, families and counselors; meeting them in their schools and their communities and helping bridge the divide that exists at times between students and the perception that college is not accessible or achievable.

Questions:

1. This request is for 3 FTEs to serve as Career and College Navigators in Region 1. Ona Navigator would be focused on the 7th grade Career Aptitude Testing and Counseling and connecting students with their strengths and goals and higher education. The additional two Navigators will be focused on connecting with students after 7th grade and into high school and transitioning them into higher education. Working closely with students in the high schools, helping students see how what they are doing in High School connects to their goals and college. This is requested as general fund (base) support.

2. What resources are necessary to implement this request?
   a. Career Aptitude Navigator: 1 FTE Benefited. Anticipated hire date: July 1, 2017

      College and Career Navigator: 2 FTE Benefited. Anticipated hire date: July 1, 2017.
   b. There will be no existing human resources that will be redirected to this new effort. Existing operations will be impacted to follow-up, enroll and provide assistance to students, families and Navigators working in the high schools and junior high schools.
   c. Capital requests include 3 vehicles for use by Navigators and initial IT needs. Operating expenses of $9,000.

3. This request is for on-going funding of the Navigator positions. One time capital expenses are for three vehicles and initial IT needs.
4. This request would potentially serve 7th through 12th grade students in Kootenai County. The long term return on this funding will be greater access to higher education and improved enrollment and completion rates for area colleges, including North Idaho College.

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AGENCY: College of Western Idaho	Agency No.:	505	FY 2018 Request
FUNCTION: Community Colleges	Function No.:	07	Page ___ of __ Pages Original Submission _X_ or
ACTIVITY	Activity No.:		Revision No. ___

A: Decision Unit No: **12.01** Title: **Student Success** Priority Ranking 1 of 3

DESCRIPTION	**General**	**Dedicated**	**Federal**	**Other**	**Total**
FULL TIME POSITIONS (FTP)	5.00				5.00
PERSONNEL COSTS:					
1. Salaries	$230,300				$230,300
2. Benefits	108,000				108,000
3. Group Position Funding					
TOTAL PERSONNEL COSTS:	$338,300				$338,300
OPERATING EXPENDITURES **by summary object:**					
1. Office expense, professional development	$15,000				$15,000
2. Travel	7,600				7,600
TOTAL OPERATING EXPENDITURES:	$22,600				$22,600
CAPITAL OUTLAY **by summary object:**					
1.	$8,000				$8,000
TOTAL CAPITAL OUTLAY:	$8,000				$8,000
T/B PAYMENTS:					
LUMP SUM:					
GRAND TOTAL	$368,900				$368,900

Supports institution/agency and Board strategic plans:

SBOE Goal 1, Objective B
Idaho SBOE identifies a **well-educated citizenry** as a strategic goal by increasing the educational attainment of all Idahoans through participation and retention in Idaho's educational system.

SBOE Goal 3, Objectives A and B
Idaho SBOE identifies **efficient use of educational resources** to promote effective and efficient delivery systems as a strategic goal. Objectives include demonstration of cost effectiveness and fiscal prudence, as well as engaging in data-informed decision making and continuous improvement.

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AGENCY: College of Western Idaho	Agency No.:	505	FY 2018 Request
FUNCTION: Community Colleges	Function No.:	07	Page ___ of __ Pages Original Submission _X_ or
ACTIVITY:	Activity No.:		Revision No. ___

A: Decision Unit No: **12.02** Title: **Equity Funding** Priority Ranking 2 of 3

DESCRIPTION	**General**	**Dedicated**	**Federal**	**Other**	**Total**
FULL TIME POSITIONS (FTP)	14.00				14.00
PERSONNEL COSTS:					
1. Salaries	$700,000				$700,000
2. Benefits	313,700				313,700
3. Group Position Funding					
TOTAL PERSONNEL COSTS:	$1,013,700				$1,013,700
OPERATING EXPENDITURES **by summary object:**					
1. Operating Expense funding for College Operations	$1,236,300				$1,236,300
2. Travel	10,000				10,000
TOTAL OPERATING EXPENDITURES:	$1,246,300				$1,246,300
CAPITAL OUTLAY **by summary object:**					
1.					
TOTAL CAPITAL OUTLAY:					
T/B PAYMENTS:					
LUMP SUM:					
GRAND TOTAL	$2,260,000				$2,260,000

Supports institution/agency and Board strategic plans:

This request is connected to the CWI strategic plan's goals as follows:

Institutional Priority 1: Student Success;

Objective 3: CWI will provide support services that improve student success.

Objective 4: CWI will develop educational pathways and services to improve accessibility.

Institutional Priority 2: Employee Success;

Objective 1: Employees will have resources, information and other support to be successful in their roles.

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AGENCY: Ag Research and Extension	Agency No.: 514	FY 2018 Request
FUNCTION:	Function No.: 02	Page _1__ of _5 Pages Original Submission _X_ or
ACTIVITY: **ARES EQUIPMENT NEEDS**	Activity No.:	Revision No. ___

A: Decision Unit No: **12.01**	Title: Grad Research Support IAES			Priority Ranking 1 of 1	
DESCRIPTION	**General**	**Dedicated**	**Federal**	**Other**	**Total**
FULL TIME POSITIONS (FTP)					
PERSONNEL COSTS: 1. Salaries 2. Benefits * 3. Group Position Funding					
TOTAL PERSONNEL COSTS:					
OPERATING EXPENDITURES **by summary object:** 1. Travel					
TOTAL OPERATING EXPENDITURES:					
CAPITAL OUTLAY **by summary object:**					
Grain Plot Planter	$50,000				
Potato Storage Renovation	$65,000				
Machine Storage Shed	$75,000				
Research Combine	$160,000				
Lab Remodel for Plant Pathologist	$150,000				
(4) Double Wide Student Housing	$1,000,000				
TOTAL CAPITAL OUTLAY:	$1,500,000				
T/B PAYMENTS:					
LUMP SUM:					
GRAND TOTAL	$1,500,000				

** For benefit calculations: $11,200 per FTE plus 20.2%*

Agricultural Research and Experiment Station Equipment Needs support the following Idaho State Board of Education Strategic Plan Goals (2017-2021):

Goal 1: A Well Educated Citizenry. Funding will develop housing at two of the Research and Extension (R&E) Centers of the Idaho Agriculture Experiment Station (IAES; Parma and Kimberly) to aid in short-term housing needs of graduate and undergraduate students when conducting research. Temporary housing at these locations will strengthen the experiences for students improving their educational experiences. Some critical equipment necessary to support their research in wheat, barley, potatoes, beans, sugar beets, canola and other oilseeds are needed to support advancements in agriculture research such as plant breeding, control of pathogens, and efficiency of water use. Facility improvements will address how to store potatoes better and offer answers to plant diseases throughout the state.

Objective A: Access

Students will more easily be engaged in their research due to housing on the R&E Centers. The equipment will improve the time for research through efficiencies in labor and advancement in use of technology. Both will aid in greater access by researchers including faculty, staff, graduate and undergraduate students.

Measure: Number of research projects conducted.

Objective B: Higher Level of Educational Attainment

Objective C: Quality Education

Measure: Number of refereed publications, presentations at national and international meetings, and graduate student awards.

Proposed Action: Enhance opportunities for research projects

Objective D: Education to Workforce Alignment

Measure: Number of students placed into agricultural-related positions in academia, industry and the public sector.

Proposed Action: Improvements in equipment and technology will be translated to the public leading to greater interactions with stakeholders.

Goal 2: Innovation and Economic Development.

Objective A: Workforce Readiness

Objective B: Innovation and Creativity

Goal 3: Effective and Efficient Educational System. As the Idaho Agricultural Experiment Station, research in agriculture is almost exclusively conducted at the R&E Centers throughout the state.

Objective A: Data-informed Decision Making

Objective B: Quality Teaching Workforce

Objective C: Alignment and Coordination

Measure: Number of collaborators from other Idaho institutions

Proposed Action: Increase collaboration in research from faculty and students from Boise State University, Lewis-Clark State College, Idaho State University and BYU-Idaho.

Objective D: Productivity and Efficiency

Objective E: Advocacy and Communication

Measure: Number of presentations or articles about research to the public

Proposed Action: Ensure reporting of research discoveries and scholarly activities through University of Idaho Extension

University of Idaho Strategic Plan Goals

Goal 1: Innovate
The funding of equipment and modifications of existing facilities at R&E Centers with the IAES will increase scholarly productivity through enhanced enrollment, products, and funding in support of the designation as a Carnegie Highest Research (R1) institution.

Goal 2: Engage
New equipment and improvements in infrastructure are to address issues in Idaho agriculture and society. Continued ties to stakeholders and agricultural industries critical to the economic vitality of Idaho will be supported.

Goal 3: Transform
New and improved equipment and facilities will provide greater training of students and aid in professional development of faculty and staff.

Goal 4: Cultivate
Commitment to improvements in equipment and facilities creates a positive work environment enhancing morale leading to success in translation of information and interactions with the public.

Questions:

1. What is being requested and why? What is the agency staffing level for this activity and how much funding by source is in the base?

Aberdeen

Grain plot planter – this will support further variety development and agronomic studies in wheat, barley and other small grains

Temporary student housing – a simple double-wide type building will be built to house 6-8 students at any time when they are conducting research

Kimberly

Potato storage building renovation – storage of potatoes is critical to the success of the potato industry; a renovation of the existing storage testing facility is necessary to conduct the research necessary to improve the sustainability of the industry

Temporary student housing – a simple double-wide type building will be built to house 6-8 students at any time when they are conducting research

Parma

Research combine – small grains (wheat, barley), beans, peas and corn in variety testing or in agronomic evaluations need to be harvested in a timely manner; a new combine would be heavily utilized by faculty in Parma

Lab remodel for plant pathologist – a research lab needs renovation to support the development of a plant pathology diagnostic lab in support of agriculture throughout the state

Temporary student housing – a simple double-wide type building will be built to house 6-8 students at any time when they are conducting research

Nancy M. Cummings

Temporary student housing – a simple double-wide type building will be built to house 6-8 students at any time when they are conducting research

Existing staffing will be supported by the equipment and modifications.

2. What resources are necessary to implement this request?

   a. *List by position: position titles, pay grades, full or part-time status, benefit eligibility, anticipated dates of hire, and terms of service*.

      Graduate and undergraduate research assistants will be supported by this request in addition to a number of faculty and staff in CALS.

   b. *Note any existing human resources that will be redirected to this new effort and how existing operations will be impacted.*

      No redirection in existing human resources is anticipated. Faculty and staff currently in place will benefit from the improvements at the R&E Centers.

   c. *List any additional operating funds and capital items needed.*

      See above for list of capital items.

3. Please break out fund sources with anticipated expenditures in the financial data matrix. (Please separate one-time vs. ongoing requests.) Non-General funds should include a description of major revenue assumption(s) (e.g. anticipated grants, etc.).

   This is a one-time funding request in support of agricultural research in potatoes, wheat, barley, beans, lentils, dry peas, canola and other oilseeds throughout the state.

4. Who is being served by this request and what are the expected impacts of the funding requested? If this request is not funded who and what are impacted?

   Opportunities for enhanced graduate student training and experiences will occur with this investment. The University of Idaho, CALS and IAES will benefit from the enhancement of infrastructure and equipment ultimately providing better information to Idaho citizens and agriculture commodities. An increase in grant funding is likely due to greater research capacity leading to increased graduate student enrollment growth to conduct the research. These metrics also support the University of Idaho in meeting its goals.

   Labor intensive inefficient methods will continue to be used to sort potatoes and bean variety development. Slower rates of improvement would be expected without the enhancements. Researchers will have less capacity to perform studies so growth in grant funding may be less. Students will not be exposed to the best current methods for conduct of research.

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AGENCY: Health Education	Agency No.: 515	FY 2018 Request
FUNCTION: WWAMI	Function No.: 02	Page ___ of __ Pages Original Submission _X_ or
ACTIVITY:	Activity No.:	Revision No. ___

A: Decision Unit No: **12.01** Title: **18 Month Curriculum** Priority Ranking 1 of 1

DESCRIPTION	**General**	**Dedicated**	**Federal**	**Other**	**Total**
FULL TIME POSITIONS (FTP)	11.28				11.28
PERSONNEL COSTS:					
1. Salaries	$875,700				$875,700
2. Benefits	192,100				192,100
3. Group Position Funding					
TOTAL PERSONNEL COSTS:	$1,067,800				$1,067,800
OPERATING EXPENDITURES **by summary object:**					
1. Travel					
TOTAL OPERATING EXPENDITURES:					
CAPITAL OUTLAY **by summary object:**					
1. Anatomy Laboratory	$197,600				$197,600
2. Clinical Laboratory	17,000				17,000
TOTAL CAPITAL OUTLAY:	$214,600				$214,600
T/B PAYMENTS:					
LUMP SUM:					
GRAND TOTAL	$1,282,400				$1,282,400

Supports institution/agency and Board strategic plans:

SBOE Goal 2, Objective B & C

CRITICAL THINKING AND INNOVATION - WWAMI will provide an environment for the development of new ideas, and practical and theoretical knowledge to foster the development of biomedical researchers, medical students, and future physicians who contribute to the health and well-being of Idaho's people and communities.

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

Objective C: Quality Instruction – Provide excellent medical education in biomedical sciences and clinical skills.

SBOE Goal 3, Objective C & E

GOAL 3: Effective and Efficient Delivery Systems – Deliver medical education, training, research, and service in a manner which makes efficient use of resources and contributes to the successful completion of our medical education program goals for Idaho

Objective C: Support and maintain interest in primary care and identified physician workforce specialty needs for medical career choices among Idaho WWAMI students.

Objective E: Efficiently deliver medical education under the WWAMI contract, making use of Idaho academic and training resources.

Problem Statement: The expansion of the WWAMI Medical Education program at the University of Idaho and its new 18 month curriculum has created the need for additional academic and clinical faculty, as well as additional staff to effectively deliver the program in Fall 2016 when the number of students doubles on the University of Idaho campus. This innovative curriculum has a clinical component that will require clinical laboratory space and equipment to support an active learning environment. The WWAMI program has been renting anatomy space at WSU and is in need of capital outlay to support the necessary infrastructure within the Idaho WWAMI program to deliver state of the art medically-oriented anatomy at the University of Idaho.

Solution Statement: Ongoing educational support needs of the Idaho WWAMI program can be met by adding $1,067,800 to currently budgeted funds which will allow the WWAMI Program to fill current gaps in personnel and meet the needs of the program. The requested $214,600 for anatomy and clinical laboratories is a one-time request that will fill the infrastructural requirements to deliver this curriculum.

Metrics to Measure Success:

- Percentage of Idaho WWAMI medical students participating in medical research (laboratory and/or community health)
- Pass rate on the U.S. Medical Licensing Examination (USMLE), Steps 1 & 2, taken during medical training.
- Support and maintain interest in primary care and identified physician workforce specialty needs for medical career choices among Idaho WWAMI students.
- Percent of Idaho WWAMI medical education contract dollars spent in Idaho each year.

Description:

In 2015, the University of Washington School of Medicine engaged in a major review and revision of the medical education curriculum. Among the many foundational changes in this new curriculum is early immersion into clinical settings and concomitant skill acquisition. The shift to early integration of clinical skills is a national trend that has in part been in response to changes in the United States Medical Licensing Board Exams (USMLE). The USMLE examination has an increased focus on traditional content areas in the basic sciences within a clinical context. This profound curricular change has and will continue to impact the delivery of medical education and training in the Idaho WWAMI program, with students remaining on the University of Idaho campus for three terms instead of two, class size expanding, and immersion into clinical skills and clinical competence. Thus, adjustments must be made to accommodate the increased number of medical students on campus and different educational approach. Expanded facilities, enhanced technology, additional faculty and support staff are necessary to support the additional students and delivering this new state of the art curriculum. The University of Idaho recognizes these needs and is working toward expanding facilities to accommodate the larger student body and curricular reform.

The new clinical medical curriculum has required WWAMI to employ more physician clinical specialists whose salaries are much higher than typical university faculty. In addition, the new curriculum has an overlap of first and second year students which has created increased needs in capital outlay.

Both anatomy and Clinical laboratory space is needed to deliver the clinical and basic science curriculum. For 44 years the Idaho WWAMI program has utilized anatomy facilities on WSU's campus. This was justified when both UI WWAMI and WSU WWAMI students were combined as one cohort of medical students. However, WSU WWAMI students moved to Spokane in 2014 just after the Idaho WWAMI program began increasing their enrollment in 2013 and the University of Idaho negotiated a 5 year contract to continue using anatomy facilities. Beginning in Fall of 2016, the Idaho WWAMI program will have 40 students in the first year cohort and will have 35 students in the second year cohort. Both Idaho cohorts will be taking medical anatomy courses concurrently, justifying the need for an independent anatomy laboratory in Idaho. This capital outlay will supply the anatomy laboratory with the needed infrastructure requirements.

Questions:

1. **What is being requested and why? What is the agency staffing level for this activity and how much funding by source is in the base?**

   The request is for personnel costs and capital outlay. Funds will be utilized to provide faculty and staff salary and benefits as well as capital funds to outfit a medical anatomy lab. 11.275 FTE positions (salary, fringe) and additional funds for anatomy laboratory and clinical laboratory are being requested to position the UI WWAMI Medical Education Program to meet the needs of the new 18 month curriculum.

2. What resources are necessary to implement this request?

a. List by position: position titles, pay grades, full or part-time status, benefit eligibility, anticipated dates of hire, and terms of service.

We are requesting 10 new permanent positions, as well as funding for 16 temporary faculty positions to appropriately staff and implement the new UW School of Medicine curriculum. See list below of new personnel requests.

b. Note any existing human resources that will be redirected to this new effort and how existing operations will be impacted.

Existing human resources will continue to operate in their current capacities but will be relieved of the additional duties not part of their original job descriptions that are currently burdensome. New human resources will be utilized directly for instruction in the new curriculum or for development and maintenance of the program.

c. List any additional operating funds and capital items needed.

Besides the requested $1,067,800 annually, $214,600 in one-time capital funds are being requested.

3. Provide additional detail about the request, including one-time versus ongoing. Include a description of major revenue assumptions, for example, whether there is a new customer base, fee structure changes, or anticipated grant awards.

This request is for $1,067,800 in base plus $214,600 in one-time funding from state general funds.

4. Who is being served by this request and what are the expected impacts of the funding requested? If this request is not funded who and what are impacted?

The primary beneficiaries if this request is granted are the medical students and their future patients, which basically encompasses all of Idaho. The WWAMI medical education program is Idaho's state-supported medical school with the mission to train physicians to meet Idaho's healthcare needs. The Idaho WWAMI program has partnerships with hospitals and clinics throughout the state and sends WWAMI students to many rural communities with the goal of increasing interest in rural medicine and primary care. If this request is not funded, Idaho's ability to train highly competent future physicians will be limited. Without this additional line item and one-time capital outlay, the Idaho WWAMI program will likely see attrition of our highly sought-after faculty and staff and we will be limited in our ability to deliver medical anatomy.

PERSONNEL COSTS

New Permanent Employees	**Salary**	**FTE**
Immunologist	$10,000	0.1
Administrative Assistant	29,848	1
Epidemiologist	19,500	0.25
Imaging and Ultrasound Specialist	9,101	0.1
Anatomist	66,315	1
Pharmacologist	15,000	0.1
Assoc. Director	55,000	0.5
Development Officer	72,000	1
Pharmacist	75,000	1
Lab Manager	60,000	1
TOTAL PERMANENT	**$411,764**	**6.05**
New Temporary Faculty	**Salary**	**FTE**
Gerontologist	$7,999.00	0.2
Pharmacologist	20,002.32	0.2
Academic Learning Specialist	33,500.00	0.5
Family Medicine Instructor	38,001.60	0.25
Family Medicine Instructor	37,498.00	0.25
Internal Medicine Instructor	40,000.00	0.25
Gastroenterologist Instructor	32,500.00	0.25
Family Medicine Instructor	32,500.00	0.25
Family Medicine Instructor	30,000.00	0.25
Emergency Medicine Instructor	12,300.00	0.2
Pediatrician Instructor	12,300.00	0.2
Clinical Instructor	12,300.00	0.2
Embryologist	10,000.00	0.125
Family Medicine Instructor	5,000.00	0.1
Histologist Instructor	75,000.00	1
Pathologist Instructor	65,000.00	1
TOTAL TEMPORARY	**$463,900.92**	**5.225**
GRAND TOTAL	**$875,664.00**	**11.275**

CAPITAL OUTLAY REQUESTS

Anatomy Laboratory			
Item	**Price**	**Quantity**	**Total**
Stainless Steel Supply Cart and Podium	$2,327.50	1	$2,327.50
Mobile Book Holder Station (Stainless Steel)	1,638.25	10	16,382.50
Base Cabinet (Stainless Steel)	6,500.00	4	26,000.00
Wall Cabinet (Stainless Steel)	1,200.00	4	4,800.00
Dead Wall Corner Cabinet (Stainless Steel)	1,400.00	3	4,200.00
Dissecting Table-Dip Tank (Stainless Steel)	5,400.00	12	64,800.00
Base Cabinet with Sink 10ft Stainless Steel)	9,650.00	1	9,650.00
Qlicksmart Blade Remover	31.00	24	744.00
Blade Handle #4	14.25	100	1,425.00
Blade Handle #3	15.00	100	1,500.00
Mayo-Hegar Needle Holder 6"	24.25	100	2,425.00
Bone Mallet Solid Stainless Head 7-1/2	155.00	5	775.00
Deep sided Body Fluid Scoop 6 3/4	37.50	12	450.00
Dissection Instrument Kit	157.00	20	3,140.00
General Dissection Forceps Serrated Tip 4-1/2	12.00	100	1,200.00
Disposable Lung Knife	208.50	12	2,502.00
Mortuary Rack (roller Type)	20,650.00	1	20,650.00
Cadaver Carrier-Hydraulic With False Frame and HD Blue Cover	22,650.00	1	22,650.00
Cadaver Lift Conv Style Side Access 27" Tray	12,000.00	1	12,000.00
TOTAL	**$84,070.25**		**$197,621.00**
Clinical Laboratory			
Item	**Price**	**Quantity**	**Total**
Brewer Basic Exam Table	$1,312.50	4	$ 5,250.00
Welch Allyn green Integrated Diagnostic Wall System	1,320.81	4	5,283.24
Clinton Industries 2102 Chrome Base Stool	127.18	8	1,017.44
Clinton 8036-36 inch Cabinet w/two Doors and Two Drawers	924.15	4	3,696.60
Detco 439 Eye-level Physician Scale	444.51	4	1,778.04
TOTAL	**$4,129.15**		**$17,025.32**
GRAND TOTAL	**$88,199.40**		**$214,646.32**

AGENCY: Special Programs	Agency No.: 501	FY 2018 Request
FUNCTION: Scholarships and Grants	Function No.: 02	Page ___ of __ Pages
ACTIVITY: Adult Completers Scholarship	Activity No.:	Original Submission _X_ or Revision No. ___

A: Decision Unit No: **12.01**	Title: **Adult Completers Scholarship**			Priority Ranking 1 of 1	
DESCRIPTION	**General**	**Dedicated**	**Federal**	**Other**	**Total**
FULL TIME POSITIONS (FTP)	1.00				1.0
PERSONNEL COSTS:					
1. Salaries	$60,000				$60,000
2. Benefits	19,800				19,800
3. Group Position Funding					
TOTAL PERSONNEL COSTS:	$79,800				$79,800
OPERATING EXPENDITURES **by summary object:**					
1. Travel	$2,000				$2,000
2. Misc. Office	1,000				1,000
TOTAL OPERATING EXPENDITURES:	$3,000				$3,000
CAPITAL OUTLAY **by summary object:**					
1. PC and workstation	$3,000				$3,000
TOTAL CAPITAL OUTLAY:	$3,000				$3,000
T/B PAYMENTS:	$3,000,000				$3,000,000
LUMP SUM:					
GRAND TOTAL	$3,085,800				$3,085,800

Supports institution/agency and Board strategic plans:

Goal1, Objective A, B and C

GOAL 1: A WELL EDUCATED CITIZENRY
Idaho's P-20 educational system will provide opportunities for individual advancement across Idaho's diverse population

Objective A: Access - Set policy and advocate for increasing access to Idaho's educational system for all Idahoans, regardless of socioeconomic status, age, or geographic location.

Performance Measures:
• Annual number of state-funded scholarships awarded and total dollar amount.

Benchmark: 20,000, $16M

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

Performance Measures:
• Percent of Idahoans ages 35-64 who have a college degree.

Benchmark: 37%
• Number of non-traditional college graduates (age>39)

Benchmark: 2,000

Objective C: Higher Level of Educational Attainment – Increase successful progression through Idaho's educational system.

Performance Measures:
• Percent of Idahoans (ages 25-34) who have a college degree or certificate requiring one academic year or more of study.

Benchmark: 60%

Description:

$3 million is being requested to fund a proposed adult completers scholarship. One FTE is also being requested to assist with administration.

Questions:

1. What is being requested and why? What is the agency staffing level for this activity and how much funding by source is in the base?

   $3 million is being requested to fund a proposed adult completers scholarship. The scholarship is intended to support adult students returning to a public college or university after an absence of at least three (3) years or more and who are completing their first undergraduate degree. Applicants may qualify for up to $3,000 per academic year for up to eight (8) consecutive semesters.

   It is anticipated that a staff position will be needed to administer this scholarship in addition to helping with the five other scholarships administered by the Office of the State Board of Education. The additional cost for staff is $85,800.

2. What resources are necessary to implement this request?

   a. List by position: position titles, pay grades, full or part-time status, benefit eligibility, anticipated dates of hire, and terms of service.

      1 FTE with benefits – scholarship administrator. The hire date is anticipated to be in July 2017

   b. Note any existing human resources that will be redirected to this new effort and how existing operations will be impacted.

      The Board's Scholarship Programs Coordinator will be dedicating a share of time to administering the scholarship.

      The Chief Policy and Planning Officer will develop administrative rules for implementation.

   c. List any additional operating funds and capital items needed.

      A web-based application must be developed and will be necessary for implementation.

3. Provide additional detail about the request, including one-time versus ongoing. Include a description of major revenue assumptions, for example, whether there is a new customer base, fee structure changes, or anticipated grant awards.

   It is anticipated that this will be annually funded

4. Who is being served by this request and what are the expected impacts of the funding requested? If this request is not funded who and what are impacted?

   Individuals served will be adult students returning to a public college or university after an absence of at least three (3) years or more and who are completing their first undergraduate degree. Completing a higher education will allow these individuals to fill skilled, high demand jobs and increase their individual earnings. A skilled, higher paid workforce will be a boost to the state economy in regard to increased buying power of individuals, will increase revenue to fund services at all levels of government, and will lure new business to Idaho.

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AGENCY: Special Programs	Agency No.: 513	FY 2018 Request
FUNCTION: Museum of Natural History	Function No.: 3000	Page 1 of 4 Pages
ACTIVITY: Development Officer	Activity No.:	Original Submission _X_ or Revision No. ___

A: Decision Unit No: **12.01** Title: **Development for IMNH** Priority Ranking 1 of 1

DESCRIPTION	**General**	**Dedicated**	**Federal**	**Other**	**Total**
FULL TIME POSITIONS (FTP)	1.00				1.00
PERSONNEL COSTS:					
1. Salaries	$80,000				$80,000
2. Benefits	28,600				28,600
3. Group Position Funding					
TOTAL PERSONNEL COSTS:	$108,600				$108,600
OPERATING EXPENDITURES **by summary object:**					
1. Travel	$4,000				$4,000
TOTAL OPERATING EXPENDITURES:	$4,000				$4,000
CAPITAL OUTLAY **by summary object:**					
1. PC and workstation	$3,000				$3,000
TOTAL CAPITAL OUTLAY:	$3,000				$3,000
T/B PAYMENTS:					
LUMP SUM:					
GRAND TOTAL	$115,600				$115,600

Supports institution/agency and Board strategic plans:

The Idaho Museum of Natural History was created by State Statute 33-3012. STATE MUSEUM OF NATURAL HISTORY. This statute stated that "there is hereby created and established at Idaho State University a state museum of natural history to be known as the Idaho museum of natural history, where tangible objects and documents reflecting our natural heritage may be collected, preserved, studied, interpreted, and displayed for educational and cultural purposes."

ISU Goal 1: LEARNING AND DISCOVERY

Objective 1.1 ISU provides a rich learning environment, in and out of the classroom

The Museum is an institution of both formal and informal education for the State of Idaho.

Objective 1.4 Undergraduate and graduate students engage in research and creative/scholarly activity.

Performance Measures 1.4.1 Number of students employed to work with a faculty member on research/creativity activities.

The Museum is a research institution that provides employment for dozens of students each year to engage in novel research and build skills for future careers.

ISU Goal 2: ACCESS AND OPPORTUNITY

Objective 2.5 Students participate in community and service learning projects and activities, student organizations, and learning communities.

Performance Measures 2.5.1 Number of student organizations, and annual number of students participating in those organizations.

The Museum engages ISU student participation in events and our exhibits attract class visits.

ISU Goal 3: LEADERSHIP IN THE HEALTH SCIENCES

Objective 3.3 ISU faculty and students engage in basic, translational, and clinical research in the health sciences.

Performance Measures 3.3.1 Number of faculty engaged in research in the health and biomedical sciences.

The Museum's Idaho Virtualization Lab is working with the Division of Health Sciences in Meridian to develop digital applications for medical training.

ISU Goal 4: COMMUNITY ENGAGEMENT AND IMPACT

Objective 4.1 ISU directly contributes to the economic well-being of the State, region, and communities it serves.

Performance Measure 4.1.1 Total economic impact of the University.

The Museum adds to the regional economy by attracting out-of-state visitors travelling the I-15 corridor.

Objective 4.3 ISU participates in formal and informal partnerships with other entities and stakeholders.

Performance Measure: 4.3.1 Number of active ISU partnerships, collaborative agreements, and contracts with public agencies and private entities.

The Museum contributes substantially to partnerships, including Federal, State and Municipal agencies. This request seeks to further expand our community of stakeholders through fundraising and sponsorship opportunities.

SBOE Goal 1 A Well Educated Citizenry, Objective A: Access
The Museum is an institution of both formal and informal education for the State of Idaho.

SBOE GOAL 2: Innovation and Economic Development,

Objective B: Innovation and Creativity,

Performance Measures: • Institution expenditures from competitive Federally funded grants • Institution expenditures from competitive industry funded grants • Funding of sponsored projects involving the private sector.

This request will directly increase economic development by securing new streams of external funding to serve the mission of the Museum.

Questions:

1. What is being requested and why? What is the agency staffing level for this activity and how much funding by source is in the base?

   We request a Development Officer position (1.0 FTE, with travel and computer expenses) to increase our fundraising capacity. This will increase the Museum's appropriated salary from 7.2 to 8.2 FTE. Currently, the Museum has no dedicated position for development and fundraising, which greatly limits our ability to engage our community and travelers to East Idaho. The lack of fundraising limits every aspect of Museum operations, from the exhibits we can offer, the educational programs available to K-12 students, and how we market our efforts to attract the public.

2. What resources are necessary to implement this request?

   a. List by position: position titles, pay grades, full or part-time status, benefit eligibility, anticipated dates of hire, and terms of service.

      Development Officer, full-time, salary $80,000 + $28,500 benefits. Date of permanent hire: July 2017.

   b. Note any existing human resources that will be redirected to this new effort and how existing operations will be impacted.

      None are available.

   c. List any additional operating funds and capital items needed.

      We request one-time capital for computer ($3,000) and ongoing funding for travel ($4,000).

3. Provide additional detail about the request, including one-time versus ongoing. Include a description of major revenue assumptions, for example, whether there is a new customer base, fee structure changes, or anticipated grant awards.

   The new Development Officer position will work with the Museum Director to enhance fundraising efforts at IMNH. The individual will be charged with identifying and acquiring external funding in the form of grants, awards, and donations from public, private, and corporate sources to further the mission of the Museum.

   Who is being served by this request and what are the expected impacts of the funding requested? If this request is not funded who and what are impacted?

   The Idaho Museum of Natural History serves the people of Idaho and visitors traveling the I-15 corridor through Pocatello. In addition to the 10,000 people and K-12 students who visit exhibits each year, our virtual museum and social media presence reaches 180,000 citizens. Our strategic plan will increase our impact to the region by engaging our stakeholders through increased opportunities for sponsorship and development in support of Museum events, exhibits, programs and research.

   The regional economic impact of the Museum is significant and has capacity for growth. More than 1.2 million people drive past Pocatello in route to Yellowstone each year, and the city is well situated to be a waypoint destination for travelers.

   Expansion of our fundraising efforts requires a Development Officer position. This request will provide a financial return many times greater than its cost. A successful development program will be established at the IMNH to provide new external funding streams in support of our educational K-12 and adult programs, exhibits and marketing, collections and research, and for future capital improvements to our aging facility.

AGENCY: Office of the State Board of Education	Agency No.:	501	FY 2018 Request	
FUNCTION: OSBE Administration	Function No.:	02	Page ___ of __ Pages	
			Original Submission _X_ or	
ACTIVITY: Board approved category	Activity No.:		Revision No. ___	

A: Decision Unit No: **12.01**	Title: **College to Career Advis Pgm Mgr**			Priority Ranking 1 of 5	
DESCRIPTION	**General**	**Dedicated**	**Federal**	**Other**	**Total**
FULL TIME POSITIONS (FTP)	1.00				1.00
PERSONNEL COSTS:					
1. Salaries	$60,000				$60,000
2. Benefits	26,000				26,000
3. Group Position Funding					
TOTAL PERSONNEL COSTS:	$86,000				$86,000
OPERATING EXPENDITURES **by summary object:**					
1. Travel	$5,000				$5,000
2. Office Equipment (PC/Phone)	2,000				2,000
3. Misc Office Supplies/Use	1,000				1,000
TOTAL OPERATING EXPENDITURES:	$6,000				$6,000
CAPITAL OUTLAY **by summary object:**					
1. PC and Workstation	$3,000				$3,000
TOTAL CAPITAL OUTLAY:	$3,000				$3,000
T/B PAYMENTS:					
LUMP SUM:					
GRAND TOTAL	$95,000				$95,000

Supports institution/agency and Board strategic plans:

GOAL 1: A WELL EDUCATED CITIZENRY
Idaho's P-20 educational system will provide opportunities for individual advancement across Idaho's diverse population

Objective A: Access - Set policy and advocate for increasing access to Idaho's educational system for all Idahoans, regardless of socioeconomic status, age, or geographic location.
Percentage of Idaho High School graduates meeting college placement/entrance exam college readiness benchmarks.
Percent of high school students enrolled and number of credits earned in Dual Credit and Advanced Placement (AP):
Percent of high school graduates who enroll in postsecondary institutions:

- Within 12 months of graduation
- Within 36 months of graduation

Objective C: Higher Level of Educational Attainment – Increase successful progression through Idaho's educational system.
Performance Measures:
Percent of Idahoans (ages 25-34) who have a college degree or certificate requiring one academic year or more of study.
High School Cohort Graduation rate.
Percentage of new full-time degree-seeking students who return (or who graduate) for second year in an Idaho postsecondary public institution. (Distinguish between new freshmen and transfers)
Unduplicated percent of graduates as a percent of degree seeking student FTE.
Percent of graduates at each level relative to Board target numbers.
Percent of full-time first-time freshman graduating within 150% of time (2yr and 4yr).

Objective E: Education to Workforce Alignment – Deliver relevant education that meets the needs of Idaho and the region.
Performance Measures:
Ratio of non-STEM to STEM baccalaureate degrees conferred in STEM fields (CCA/IPEDS Definition of STEM fields).

GOAL 2: Innovation and Economic Development
The educational system will provide an environment that facilitates the creation of practical and theoretical knowledge leading to new ideas.
Objective A: Workforce Readiness – Prepare students to efficiently and effectively enter and succeed in the workforce.
Performance Measures:
Percentage of graduates employed in Idaho 1 and 3 years after graduation
Percentage of students participating in internships.

GOAL 3: Effective and Efficient Educational System – Ensure educational resources are coordinated throughout the state and used effectively.
Objective C: Alignment and Coordination – Facilitate and promote the articulation and transfer of students throughout the education pipeline (Secondary School, Technical Training, 2yr, 4yr, etc.).
Percent of Idaho community college transfers who graduate from four year institutions.
Percent of dual credit students who go-on to postsecondary education within 12 months of graduating from high school.
Percent of dual credit students who graduate high school with an Associate's Degree
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.
Percent of postsecondary students participating in a remedial program who completed the program or course

Questions:

1. What is being requested and why? What is the agency staffing level for this activity and how much funding by source is in the base?

   One (1) full time equivalent (FTE) position is being requested to coordinate statewide college to career activities and resources and provide assistance to school districts and public postsecondary institutions for the seamless transfer of students through the education pipeline and on to a career. The Governor's Task Force implementation committee recognized college and career advising as being one of the key factors in reaching the Board's 60% educational attainment goal. In response to this recommendation the legislature provided funding to school districts to provide targeted advising and mentoring to students at secondary schools. While assistance is being provided to school districts in the areas of technical assistance and support on how to implement counseling and advising models identified by the committee, it has become evident that a position focused on providing additional support (including training) is necessary, not only to districts as they implement new models for college advising and mentoring, but to also focus on providing a seamless transfer of students from secondary schools to postsecondary educational experience that range from industry recognized certificates to academic degrees. This position would focus on providing supports to address these needs as well as focus on postsecondary advising efforts to better align these efforts with the states workforce demand and state economic needs. This position will also help to maintain and update content on the Boards Next Steps Idaho website (nextstepsidaho.gov), this website is a "one stop shop" for students and parents, as well as school district staff, to help student in the state be ready for life beyond high school. The site includes planning steps for students starting in the 8th grade through 12th grade as well as many other resources to help students to be ready to go on after high school.

   Currently staffing is limited to the bare minimum and provide through multiple avenues. A part time, term limited position funded through the federal College Access Challenge Grant has provided limited support to school districts and coordination with postsecondary institutions in this area. The grant covering these activities will end in September 2016.

2. What resources are necessary to implement this request?

   a. List by position: position titles, pay grades, full or part-time status, benefit eligibility, anticipated dates of hire, and terms of service.

      One full time position. This position would be benefit eligibility and would start July 1, or there about, if funded.

   b. Note any existing human resources that will be redirected to this new effort and how existing operations will be impacted.

   c. List any additional operating funds and capital items needed.

3. Provide additional detail about the request, including one-time versus ongoing. Include a description of major revenue assumptions, for example, whether there is a new customer base, fee structure changes, or anticipated grant awards.

   This request would result in ongoing funding, amounts requested are based on the expected starting salary for a program manager position in the Office of the State Board of Education.

4. Who is being served by this request and what are the expected impacts of the funding requested? If this request is not funded who and what are impacted?

   Students, school districts and our state postsecondary institutions would be served. It is expected this position will have a positive impact in the number of students graduating from high school and going on to some form of postsecondary education, thereby increasing our state "go on" rate. The position will also work with the postsecondary institutions to coordinate advising initiatives as well as provide analysis of existing models to inform future decisions of the State Board regarding advising policies for our postsecondary institutions. If not funded it will be more difficult for school districts to implement new advising and mentoring models and it will take longer to assure that new models implemented and admissions, credit transfer, and postsecondary advising are aligned.

AGENCY: Office of the State Board of Education	Agency No.: 501	FY 2018 Request
FUNCTION: Public Charter School Commission	Function No.: 03	Page ___ 1 of _3 Pages
ACTIVITY: General Education	Activity No.:	Original Submission _X_ or Revision No. ___

A: Decision Unit No: **12.02**	Title: **Renewal Process**			Priority Ranking 2 of 5	
DESCRIPTION	**General**	**Dedicated**	**Federal**	**Other**	**Total**
FULL TIME POSITIONS (FTP)					
PERSONNEL COSTS:					
TOTAL PERSONNEL COSTS:					
OPERATING EXPENDITURES **by summary object:**					
1. Contractors	$44,200				$44,200
2. Travel	6,900				6,900
3. Hearing Officer	20,000				20,000
TOTAL OPERATING EXPENDITURES:	$71,100				$71,100
CAPITAL OUTLAY **by summary object:**					
TOTAL CAPITAL OUTLAY:					
T/B PAYMENTS:					
LUMP SUM:					
GRAND TOTAL	$71,100				$71,100

Supports institution/agency and Board strategic plans:
Goal 1, Objective D

Objective D: Quality Education – Deliver quality programs that foster the development of individuals who are entrepreneurial, broadminded, critical thinkers, and creative.

Description:
The Office of the State Board of Education (OSBE) is responsible for staffing the Public Charter School Commission (PCSC). The designee of the executive director serves a secretary to the PCSC and acts at the direction of the PCSC to enforce the provisions of Idaho Code §33-52, Public Charter Schools.

The mission of the PCSC is to protect the interests of students and taxpayers, as well as the autonomy of charter school boards. Fulfillment of this mission requires ongoing monitoring of schools' academic, operational, and financial status. Statute obliges charter school authorizers, including the PCSC, to periodically review the schools they oversee for purposes of renewal or non-renewal. Schools whose charters are renewed will continue operating using taxpayer funds, while schools whose charters are non-renewed will close.

Renewal evaluation is an important practice in charter school authorizing on a national basis. Most authorizers include in their renewal process an on-site school evaluation conducted by independent contractors, who present their findings to the PCSC. Teams of independent reviewers provide expert, unbiased perspective on the quality of each school being considered for renewal.

Additionally, authorizers must hold public hearings to consider each school for renewal or non-renewal. Use of a hearing officer for this purpose permits objective evaluation of evidence presented by both parties, followed by formation of a non-binding recommendation to the PCSC in advance of a renewal/non-renewal decision.

Questions:

1. What is being requested and why? What is the agency staffing level for this activity and how much funding by source is in the base?

OSBE is requesting funds to cover the cost of performing thorough pre-renewal reviews of public charter schools' academic, operational, and financial outcomes. This includes the performance of independent, pre-renewal site visits for schools authorized by the PCSC. Such visits represent a national best practice in charter school authorizing.

Full-day reviews would be conducted by panels of two, independent evaluators in the fall immediately preceding a school's renewal/non-renewal date. Evaluators would be selected from a variety of geographical areas and professional backgrounds most relevant to the individual schools under review. 10-15 schools would be evaluated annually.

An individual would be contracted to join the evaluators for site visits, as well as to further assist PCSC staff with the larger renewal process, including evaluation of school performance data and development of materials based on school outcomes and renewal applications. This contract would be for $35.00 per hour, not to exceed 520 hours per year. The contract work would be completed between September and February of each year.

A hearing officer would be hired to conduct the public hearings required by statute as part of the renewal/non-renewal process. These hearings would require advance review of materials, conducting the hearings themselves, reviewing closing documents, and drafting recommendations regarding each of 10-15 schools per year.

OSBE's staff dedicated to PCSC authorizing work (4.0 FTE) is sufficient to develop evaluation tools, organize travel, and train independent evaluators. With the assistance of one, part-time contractor, OSBE staff can also prepare materials for consideration by the hearing officer.

2. What resources are necessary to implement this request?

   a. List by position: position titles, pay grades, full or part-time status, benefit eligibility, anticipated dates of hire, and terms of service.

      None

   b. Note any existing human resources that will be redirected to this new effort and how existing operations will be impacted.

      None. This work can be absorbed by existing OSBE staff.

   c. List any additional operating funds and capital items needed.

      Independent evaluators (contracted): $44,200 annually

      - $18,200 for not more than 520 hours of contract work assisting with the renewal process each September through February
      - $26,000 for independent evaluators conducting one-day site visits

      Travel costs to school sites: $6,900 annually

      Hearing officer for public renewal hearings: $20,000 annually

3. Provide additional detail about the request, including one-time versus ongoing. Include a description of major revenue assumptions, for example, whether there is a new customer base, fee structure changes, or anticipated grant awards.

   Because the PCSC makes renewal decisions about all the schools it authorizes on a rotating basis, pre-renewal independent reviews represent an annual cost. It is important that the evaluators and hearing officer be independent individuals who bring unbiased opinions, as well as expertise specific to the schools under review.

   The request for $71,100 would enable implementation of full-day reviews by panels of three contracted evaluators, part-time contracted support contributing to the overall renewal process, and conduct of required public hearings by a hearing officer.

   If necessary, a scaled-back version of the request ($55,500) would enable implementation of full-day reviews by panels of two contracted evaluators plus one volunteer, as well as part-time contracted renewal process support at a lower hourly rate ($30/hour) and a hearing officer.

   A further reduced version of the request ($50,600) would enable implementation of full-day reviews by panels of two contracted evaluators, as well as a hearing officer.

4. Who is being served by this request and what are the expected impacts of the funding requested? If this request is not funded who and what are impacted?

This request primarily serves Idaho taxpayers and public charter school by supporting well-informed authorizing decisions. School closure decisions are important but difficult, requiring thorough evaluation by experts to ensure their appropriateness. Charter renewals should be decided upon with equal care because they impact students' lives and represent ongoing use of taxpayer dollars.

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AGENCY: Office of the State Board of Education	Agency No.: 501	FY 2017 Request
FUNCTION: OSBE Administration	Function No.: 01	Page ___ of __ Pages
ACTIVITY: Board approved category	Activity No.:	Original Submission _X_ or Revision No. ___

A: Decision Unit No: **12.03** Title: **Research Analyst** Priority Ranking 3 of 5

DESCRIPTION	**General**	**Dedicated**	**Federal**	**Other**	**Total**
FULL TIME POSITIONS (FTP)	1.00				1.0
PERSONNEL COSTS:					
1. Salaries	$57,900				$57,900
2. Benefits	25,700				25,700
3. Group Position Funding					
TOTAL PERSONNEL COSTS:	$83,600				$83,600
OPERATING EXPENDITURES **by summary object:**					
1. Travel	$3,000				$3,000
TOTAL OPERATING EXPENDITURES:	$3,000				$3,000
CAPITAL OUTLAY **by summary object:**					
1.					
TOTAL CAPITAL OUTLAY:					
T/B PAYMENTS:					
LUMP SUM:					
GRAND TOTAL	$86,600				$86,600

Supports institution/agency and Board strategic plans:

Goal 3: Effective and Efficient Delivery Systems

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.

Description:

The Office of the State Board of Education requests 1 FTP and associated funding to recruit and fill a new Research Analyst position.

With the increase of data requests and the Board staff assuming the responsibility of reporting data for Complete College America, an additional Research Analyst would ensure timeliness of data and additional expertise in analytical reports.

This person would primarily focus on qualitative data analysis. As such, this person would oversee the use of surveys and assist office staff with construction and analysis of those surveys. An emphasis in qualitative data analysis would augment the current structure of the research team, which is currently more skilled in quantitative analysis.

With the Board focused on using data to make policy decisions, a complete research unit with both qualitative and quantitative analysts would provide the Board not only the numbers, but also help the Board understand the context for the analysis. Qualitative research could also be useful in the deployment of pilot studies at schools, districts, or institutions.

Questions:

1. What is being requested and why? What is the agency staffing level for this activity and how much funding by source is in the base?

   One FTP and $81,900 in ongoing General Funds for a Research Analyst to provide sophisticated data analytics to the Board and its staff. There is no current base funding for this position. Operating costs of $3,000 would cover the purchase of computer, printer, travel and professional development.

2. What resources are necessary to implement this request?

   a. List by position: position titles, pay grades, full or part-time status, benefit eligibility, anticipated dates of hire, and terms of service.

      Research Analyst, Pay Grade L, full-time, benefit eligible, date of hire: 7/1/2017

   b. Note any existing human resources that will be redirected to this new effort and how existing operations will be impacted.

      No existing human resources will be redirected to this new effort. Existing operations will be enhanced with this new skill set.

   c. List any additional operating funds and capital items needed.

      $3,000 in ongoing operating expenses for computer equipment, printer, travel and professional development.

3. Please break out fund sources with anticipated expenditures in the financial data matrix. (Please separate one-time vs. ongoing requests.) Non-General funds should include a description of major revenue assumption(s) (e.g. anticipated grants, etc.).

Fund source is ongoing General Funds.

4. Who is being served by this request and what are the expected impacts of the funding requested? If this request is not funded who and what are impacted?

   The State Board of Education, and the public schools and institutions under the governance of the Board, will benefit from data analytics in support of strategically increasing postsecondary access and success.

   In addition, the Legislature, other state agencies, businesses and other entities in the state are increasingly relying on good data to make decisions. The education system is the biggest state investment and the largest data source in the state. Good analysis is essential to making these data effective and available.

5. If this is a high priority item, list reason why unapproved Line Items from the prior year budget request are not prioritized first.

Not applicable.

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AGENCY: Office of the State Board of Education	Agency No.:	501	FY 2018 Request
FUNCTION: OSBE Administration	Function No.:	02	Page ___ of __ Pages
ACTIVITY: Board approved category	Activity No.:		Original Submission _X_ or Revision No. ___

A: Decision Unit No: **12.04**	Title: **Graduate Medical Education Plan**			Priority Ranking 4 of 5	
DESCRIPTION	**General**	**Dedicated**	**Federal**	**Other**	**Total**
FULL TIME POSITIONS (FTP)					
PERSONNEL COSTS: 1. Salaries 2. Benefits 3. Group Position Funding					
TOTAL PERSONNEL COSTS:					
OPERATING EXPENDITURES **by summary object:**					
1. Contract labor	$54,600				$54,600
2. Travel	16,100				16,100
3.					
TOTAL OPERATING EXPENDITURES:	$70,700				$70,700
CAPITAL OUTLAY **by summary object:** 1.					
TOTAL CAPITAL OUTLAY:					
T/B PAYMENTS:					
LUMP SUM:					
GRAND TOTAL	$70,700				$70,700

Supports institution/agency and Board strategic plans:

GOAL 2: Innovation and Economic Development
The educational system will provide an environment that facilitates the creation of practical and theoretical knowledge leading to new ideas.

Objective A: Workforce Readiness – Prepare students to efficiently and effectively enter and succeed in the workforce.

Description:

The purpose of this proposal is to develop a personal service contract for a one-year period to develop a ten-year strategic plan to develop Graduate Medical Education (GME) for the state of Idaho.

Graduate Medical Education is extremely important to the physician workforce in Idaho. Physicians who do residency training in Idaho have a high likelihood of staying to practice in Idaho after residency training. Studies have shown that anywhere from 50%-75% of residents that train in a location will stay within 100 miles of that location compared to 41% retention rates for medical students who remain in the same state where they have attended medical school. Hence, it is important to have multiple residency programs in the state of Idaho to help train the future workforce and to retain physicians in the state.

Idaho currently ranks 48th in the United States for the number of resident physicians per capita with only 6.4 resident physicians per 100,000 people. This low ratio of resident physicians to state population places Idaho at 426% below the national median of 27.3 resident physicians per 100,000. This means that Idaho does not have enough training positions within the state necessary to generate the workforce for a rapidly growing state. Additionally, 25% of Idaho physicians are over age 60 and will be retiring in the next decade. Coupled with the fact that Idaho has an increased number of medical school seats (the Legislature has recently increased the number of Idaho medical students to 40/year in the Idaho WWAMI program and 10/year at the University of Utah; and there is a proposed Idaho College of Osteopathic Medicine which, if accredited, will graduate ~150 medical students per year starting in 2022), creates a situation in which Idaho will lose medical students trained in Idaho after graduation to residency training programs outside of Idaho unless Idaho builds the infrastructure for more GME programs now. Thus, it is imperative that Idaho start to build the GME infrastructure now in order to provide enough training opportunities to not only retain many of these students in-state but to attract other top notched medical school graduates into Idaho to train and retain for Idaho's citizens' future healthcare workforce needs.

Deliverables:

The outcome of this one-year personal service contract will be to achieve the following:

1. Develop a ten-year Idaho Graduate Medical Education strategic plan and timeline.
2. Travel across Idaho and meet with key leaders and stakeholders in face-to-face meetings to develop concepts and strategies to grow Graduate Medical Education in Idaho.
3. Conduct three face-to-face workshops with key leaders and stakeholders in Idaho to help develop and refine the Idaho GME strategic plan.
4. Develop a job description for a part-time Graduate Medical Education Physician Coordinator for Idaho that would be hired at the completion of this personal service contract. This individual would then work with all stakeholders and leaders to help refine and implement the ten-year Idaho GME strategic plan.

There are six specific goals of the ten-year strategic plan:

1. Expand the existing GME programs as capacity, capability, and resources allow. (e.g. Family medicine, internal medicine and psychiatry programs).

2. Create new GME programs (e.g. general surgery, emergency medicine, pediatrics, as well as new family medicine, internal medicine and psychiatry programs) in a thoughtful and coordinated manner.
3. Develop and fund fellowship programs (e.g. geriatrics, sports medicine, obstetrics, palliative care, and rural family medicine programs) to augment and refine additional skills in emerging Idaho physicians.
4. Develop a plan to accomplish these tasks employing short-term (1-3 years), middle-term (4-7 years), and long-term (7-10 years) strategies.
5. Grow Idaho's GME capacity in a cost effective way partnering with the Governor and Idaho Legislature as well as the Idaho State Board of Education (SBOE), Idaho Medical Association (IMA), and Idaho Hospital Association (IHA).
6. Accomplish this expansion in harmony with other GME programs and the emergence of increased medical school capacity at the University of Washington, University of Utah, Pacific Northwest University of Osteopathic Medicine, the newly created Washington State University Elson Floyd College of Medicine, and the recently proposed Idaho College of Osteopathic Medicine.

Questions:

1. What is being requested and why? What is the agency staffing level for this activity and how much funding by source is in the base?

The proposal budget for this personal service contract and attendant meetings, travel and salary would be as follows:

Graduate Medical Education Physician Contractor	
15 hours/week x 52 weeks x $70/hour	$ 54,600
Three face to face Graduate Medical Education meetings:	
Meeting Rooms for attendees	$ 1,500
Travel for attendees	$ 5,000
Lodging for attendees	$ 800
Meals for attendees	$ 1,500
Travel for Graduate Medical Education Physician in Idaho:	
One – Two Trips/month across Idaho	
Gas @ $ 0.55/mile	$ 1,500
Lodging	$ 1,800
Meals	$ 1,500
Miscellaneous Items (Postage, printed materials, etc.)	$ 2,500
Total proposed personal service contract budget for Idaho Graduate Medical Education contractor for the year	$ 70,700

2. What resources are necessary to implement this request?

   a. List by position: position titles, pay grades, full or part-time status, benefit eligibility, anticipated dates of hire, and terms of service.

      Only general fund operating expenditures are requested for fiscal year 2018, transitioning to a 0.4 FTE housed in the Office of the State Board of Education to be included as a line item in the fiscal year 2019 budget request.

   b. Note any existing human resources that will be redirected to this new effort and how existing operations will be impacted. None

   c. List any additional operating funds and capital items needed. None

3. Provide additional detail about the request, including one-time versus ongoing. Include a description of major revenue assumptions, for example, whether there is a new customer base, fee structure changes, or anticipated grant awards.

   This request would result in ongoing funding for operating expenses with the labor portion transitioning to personnel costs after one year.

4. Who is being served by this request and what are the expected impacts of the funding requested? If this request is not funded who and what are impacted?

This comprehensive plan to expand and develop GME in Idaho will create a strategic blueprint in which to develop, grow, and sustain the physician workforce needed to meet the needs of Idaho's citizens for decades to come. The budget request to the Office of the State Board of Education for the development of this plan will be approximately $ 70,650 over the next year.

The development of this GME vision and infrastructure creation must start today. Idaho must invest now to ensure we together build the workforce that Idaho citizens need and deserve for generations to come.

AGENCY: Special Programs	Agency No.:	516	FY 2018 Request
FUNCTION: Scholarships and Grants	Function No.:	03	Page ___ of __ Pages
ACTIVITY:	Activity No.:		Original Submission _X_ or Revision No. ___

A: Decision Unit No: **12.05**	Title: GEARUP				Priority Ranking 5 of 5
DESCRIPTION	**General**	**Dedicated**	**Federal**	**Other**	**Total**
FULL TIME POSITIONS (FTP)	0.00				0.0
PERSONNEL COSTS: 1. Salaries 2. Benefits 3. Group Position Funding					
TOTAL PERSONNEL COSTS:	0				0
OPERATING EXPENDITURES **by summary object:** 1. Travel					
TOTAL OPERATING EXPENDITURES:	0				0
CAPITAL OUTLAY **by summary object:** 1. PC and workstation					
TOTAL CAPITAL OUTLAY:	0				0
T/B PAYMENTS:			$1,400,000		$1,400,000
LUMP SUM:					
GRAND TOTAL	0		$1,400,000		$1,400,000

Supports institution/agency and Board strategic plans:

Goal 1, Objective A

Goal 1, A Well Educated Citizenry, calls for providing opportunities for individual enhancement and Objective A, Access, advocates for increasing access for individuals of all ages, abilities, and economic means to Idaho's P-20 educational system.

Performance Measure: Percent of need met by available need-based financial aid.

Description:

GEAR UP (Gaining Early Awareness and Readiness for Undergraduate Programs) is a federal discretionary grant program designed to increase the number of low-income students who are prepared to enter and succeed in postsecondary education. This program provides six-year grants to states to provide services at high-poverty middle and high schools which are designated as GEAR UP schools. GEAR UP started in Idaho in FY 2007 with the renewable scholarships starting in FY 2013.

The GEAR UP selection and funding is based on a student's financial need, academic merit, and participation in GEAR UP. In fiscal year 2018 there will be two phases requiring funding, GEAR UP Phase 1 and GEAR UP Phase 2. GEAR UP Phase 1 is comprised of continuing students, returning students, and fifth year students. GEAR UP Phase 2 includes the first students funded from GEAR UP Phase 2. It is anticipated that approximately 226 students will receive Phase 1 scholarships in fiscal year 2017 and reducing down to 39 students in fiscal year 2019 when Phase 1 is completed.

Starting in fiscal year 2018 and based on fewer eligibility restrictions, it is estimated that more students (possibly up to 3,795) would receive at least $600 in GEAR UP Phase 2 scholarships. The amount of scholarship is dependent upon the number of applicants. The appropriation for FY 2017 is $1,704,600. This request is to increase the spending authority for the GEAR UP program in FY 2018 ongoing by $1.4M. The money not expended stays in the GEAR UP fund, so it is prudent to request the full amount allocated by GEAR UP.

Questions:

1. What is being requested and why? What is the agency staffing level for this activity and how much funding by source is in the base?

   This request reflects an increase of $1.4M in ongoing federal funds spending authority for GEAR UP scholarships. This request does not affect staffing levels.

2. What resources are necessary to implement this request?

   No additional resources are required as current staffing levels are sufficient.

3. Please break out fund sources with anticipated expenditures in the financial data matrix. (Please separate one-time vs. ongoing requests.) Non-General funds should include a description of major revenue assumption(s) (e.g. anticipated grants, etc.).

   Federal spending authority with grant funds already awarded.

4. Who is being served by this request and what are the expected impacts of the funding requested? If this request is not funded who and what are impacted?

   GEAR UP is designed to increase the number of low-income students from high-poverty middle and high schools that are prepared to enter and succeed in postsecondary education. GEAR UP provides students an opportunity to apply for a 4-year renewable scholarship based upon financial need and level of participation in the program.

5. If this is a high priority item, list reason why unapproved Line Items from the prior year budget request are not prioritized first.

   N/A

AGENCY: Idaho Public Television	Agency No.:	520	FY 2018 Request
FUNCTION: Idaho Public Television	Function No.:	01	Page 1 of 4
			Original Submission: X
ACTIVITY: N/A	Activity No.:	N/A	Revision No. _________

A: Decision Unit No: **12.01** Title: **Educational Outreach** Priority Ranking 1 of 1

DESCRIPTION	**General**	**Dedicated**	**Federal**	**Other**	**Total**
FULL TIME POSITIONS (FTP)	2.00				2.00
PERSONNEL COSTS:					
1. Salaries	$109,200				$109,200
2. Benefits	48,100				48,100
3. Group Positions					
TOTAL PERSONNEL COSTS:	$157,300				$157,300
OPERATING EXPENDITURES **by summary object:**					
1. Other Services	$5,000	$5,000			$10,000
2. Administrative Services	5,000	5,000			10,000
3. Employee Travel	10,000				10,000
TOTAL OPERATING EXPENDITURES:	$20,000	$10,000			$30,000
CAPITAL OUTLAY **by summary object:**					
1. Computer Equipment	$5,800				$5,800
TOTAL CAPITAL OUTLAY:	$5,800				$5,800
T/B PAYMENTS:					
LUMP SUM:					
GRAND TOTAL	$183,100	$10,000			$193,100

Supports institution/agency and Board strategic plans:

SBoE Goal 1, Objective A

Idaho Public Television reaches more than 97% of Idaho households with quality educational content that has a demonstrated impact on educational success in school. In addition, we reach a high percentage of low income and ESL learners through our broadcast and online resources. This new initiative will connect more teachers and learners with local and national content that has a proven track record of improving educational outcomes for preschool and elementary students.

Performance Measure:

Number and location of students and educators served through presentations and workshops, number of educators signing up for Scout/PBS Learning Media resources

Idaho Public Television Goal 1
A WELL-EDUCATED CITIZENRY - Idaho's P-20 educational system will provide opportunities for individual advancement across Idaho's diverse population.

Objective 2: Nurture and foster collaborative partnerships with other Idaho state entities and educational institutions to provide services to the citizens of Idaho.

Performance Measure:

Number of presentations to schools and other educational institutions and entities

Objective 5: Provide access to IdahoPTV new media content to citizens anywhere in the state, which supports citizen participation and education.

Performance Measure:

Number of students and educators served through presentations and workshops, number of educators signing up for Scout/PBS Learning Media resources, number of visitors to our educational websites.

Objective 6: Broadcast educational programs and provide related resources that serve the needs of Idahoans, which include children, ethnic minorities, learners, and teachers.

Performance Measure:

Number of students and educators served through presentations and workshops, number of educators signing up for Scout/PBS Learning Media resources, number of minorities and low income students served through presentations and workshops.

Description:

Idaho Public Television proposes enhancing our educational outreach efforts with the addition of two new positions and related expenses to supplement the one current position devoted to these activities. By making presentations to teachers, parents and caregivers about how best to utilize the more than 100,000 educational resources available from Idaho Public Television free to Idahoans, we hope to increase the use of these resources and the effectiveness of the learning process, thus improving standardized test scores in literacy and STEM subjects. Many educators and parents are not aware of these resources or how best to employ them for maximum effectiveness. These two new educational positions will travel the state informing the community about these resources and demonstrating best practices for their utilization both at home and in the classroom. These additional positions will allow us to increase our effectiveness in northern and eastern Idaho where the current costs to serve these communities from Boise is prohibitive. While we provide high quality educational material for all ages, we plan to concentrate most of our efforts with preschool and elementary grades where the demonstrated impact is greatest. These positions will also develop educational material to accompany Idaho Public Television's productions to make them more valuable to classroom teachers and students.

Questions:

1. What is being requested and why? What is the agency staffing level for this activity and how much funding by source is in the base?

   Two additional full time education positions are being requested to provide support for IdahoPTV and PBS educational tools such as Learning Media and other online resources to schools, libraries, families, daycares, after school networks and other educational institutions. The Project Coordinator position would serve as supervisor and coordinate the activities of both our existing Education Specialist and the new Education Specialist position we are requesting. These positions would be able to produce educational components for local programs as well as bring educational offerings from CPB and PBS to Idaho communities. These offerings could include educational video segments, lesson plans based on state standards, teacher guides and websites and other digital learning materials. These educational positions would work closely with the Idaho State Department of Education, Office of the State Board of Education, Idaho Commission for Libraries, the STEM Action Center, and other local educational organizations. These positions would help augment the classroom curriculum by providing quality material to educators and learners.

   These specialists would travel around the state to schools, libraries, and other educational sites to demonstrate Learning Media, Literacy in a Trunk, STEM in a Trunk and a whole host of educational components produced by PBS and CPB, the most trusted educational brands in America.

2. What resources are necessary to implement this request?

   a. List by position: position titles, pay grades, full or part-time status, benefit eligibility, anticipated dates of hire, and terms of service.

      See attached worksheet.

   b. Note any existing human resources that will be redirected to this new effort and how existing operations will be impacted.

      In addition to an existing Education Specialist, this line item would also receive limited support from existing communication, promotion and production positions. Design and printing of brochures and pamphlets, web and digital assets, as well as short video segments might be occasionally needed.

   c. List any additional operating funds and capital items needed.

      Operational funding includes costs of printing of materials, postage and shipping, and travel to schools, libraries, child care facilities, and others sites to make presentations at locations statewide. We anticipate acquiring two $5,000 grants from private sources (dedicated funds) to supplement operational costs.

Capital items include a portable computer and large, external monitor for each position that will be used both in office and on location for demonstrations of online resources available to students, educators, and other community participants.

3. Provide additional detail about the request, including one-time versus ongoing. Include a description of major revenue assumptions, for example, whether there is a new customer base, fee structure changes, or anticipated grant awards.

   Besides the ongoing funding for the two positions, this request contains ongoing operational expenses for employee travel in each region of the state as well as educational meetings and conferences held by PBS and CPB. IdahoPTV has office space in Moscow and Pocatello to accommodate these personnel. One-time costs include the capital items described in 2(c) above.

4. Who is being served by this request and what are the expected impacts of the funding requested? If this request is not funded who and what are impacted?

   Educators, students, librarians and patrons from around the state will be served by these educational positions. PBS and CPB extend grants on a semi-regular basis that go along with the educational opportunities that exist with many programs produced for air and online. Educational outreach grants for history and science-based programming have been made available. More educational opportunities will be available in years to come. Currently, we are not able to take advantage of many of these grants because we do not have the personnel to accomplish the tasks. If not funded, we would not be able to enhance education as described herein.

12.01 Line Item - Educational Outreach

Position	FTP	Class	Pay Grade	Policy Rate	Salary	Benefits	Total PC	Emp Travel	Other OE	O.T. CO	Total
Project Coordinator	1.00	02913	L	27.83	57,900	24,800	82,700	5,000	10,000	2,900	100,600
Education Specialist	1.00	02362	K	24.65	51,300	23,300	74,600	5,000	10,000	2,900	92,500
Totals	2.00				109,200	48,100	157,300	10,000	20,000	5,800	193,100
By Fund:											
General Fund	2.00				109,200	48,100	157,300	10,000	10,000	5,800	183,100
Dedicated Fund									10,000		10,000
Totals	2.00				109,200	48,100	157,300	10,000	20,000	5,800	193,100

Each position would travel within state and incur expenses for events and community engagement. Each position will need a laptop with standard software ($2,500 ea) and a large monitor ($400 ea) for demonstrations.

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AGENCY: Division of Vocational Rehabilitation	Agency No.:	523	FY 2018 -Request
FUNCTION: Extended Employment Services	Function No.:	05	Page _1__ of 3 Pages
			Original Submission _X_ or
ACTIVITY:	Activity No.:		Revision No. ___

A: Decision Unit No: 12.01	Title: **Additional Extended Employment Program Funds**			Priority Ranking 1 of 4	
DESCRIPTION	**General**	**Dedicated**	**Federal**	**Other**	**Total**
FULL TIME POSITIONS (FTP)					
PERSONNEL COSTS: 1. Salaries 2. Benefits 3. Group Position Funding					
TOTAL PERSONNEL COSTS:					
OPERATING EXPENDITURES **by summary object:** 1. Travel					
TOTAL OPERATING EXPENDITURES:					
CAPITAL OUTLAY **by summary object:** 1. PC and workstation					
TOTAL CAPITAL OUTLAY:					
T/B PAYMENTS:	$214,300				$214,300
LUMP SUM:					
GRAND TOTAL	$214,300				$214,300

Supports institution/agency and Board strategic plans:

Goal 1 Objective 1

Objective: To assist the agency in providing a rate increase to the Extended Employment Services (EES) providers

Performance Measure: To enhance the providers ability to recruit and retain qualified front-line staff to support the customers served by the EES program.

Description:

The Division of Vocational Rehabilitation is requesting an additional $214,300 in General Fund appropriation for the Extended Employment Services (EES) program. Idahoans with the most significant disabilities are some of the State's most vulnerable citizens. The EES program provides people with the most significant disabilities employment opportunities in both non-integrated settings or with a competitive job in the community. This additional amount of funding will assist in recruiting and retaining the most qualified front-line staff to support those individuals served. A preliminary assessment indicates, front-line staff are paid beginning at $7.25/hour, depending on the position, providers pay structure and benefits package. Our providers have indicated without a fee for service rate increase, they will struggle to recruit and retain qualified staff, therefore leaving the most significantly disabled vulnerable.

Questions:

1. What is being requested and why? What is the agency staffing level for this activity and how much funding by source is in the base?

A 5.7% increase to the level of fee for services for both Work Services and Community Supported Employment under the EES program to be set by the Administrator of IDVR in order to increase the providers' ability to recruit and retain qualified workers who can deliver services in a safe and effective manner to those served by the EES program.

1. What resources are necessary to implement this request?
   a. List by position: position titles, pay grades, full or part-time status, benefit eligibility, anticipated dates of hire, and terms of service.

      None

   b. Note any existing human resources that will be redirected to this new effort and how existing operations will be impacted.

      None

   c. List any additional operating funds and capital items needed.

      None

2. Provide additional detail about the request, including one-time versus ongoing. Include a description of major revenue assumptions, for example, whether there is a new customer base, fee structure changes, or anticipated grant awards.

   This is a request for ongoing additional EES program funds to directly benefit the fee for service rate of providers in order to compensate their front-line staff that provides the direct support to individuals with the most significant disabilities being served under the EES program. There is no additional revenue associated with this request.

3. Who is being served by this request and what are the expected impacts of the funding requested? If this request is not funded who and what are impacted?

   This request will assist the providers of EES services to recruit and retain qualified workers who can deliver services in a safe and effective manner to those served by the EES program. The impact is statewide. Idaho will benefit from having qualified staff in positions to support the most vulnerable as they engage in employment activity.

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AGENCY: Division of Vocational Rehabilitation	Agency No.:	523	FY 2018 -Request
FUNCTION: Vocational Rehabilitation	Function No.:	02	Page 1 of 4 Pages
ACTIVITY: Basic Grant	Activity No.:	02	Original Submission _X_ or Revision No. ___

A: Decision Unit No: **12.02**	Title: **Additional Grant and Match Funds**		Priority Ranking 2 of 4		
DESCRIPTION	**General**	**Dedicated**	**Federal**	**Other**	**Total**
FULL TIME POSITIONS (FTP)					
PERSONNEL COSTS: 1. Salaries 2. Benefits 3. Group Position Funding					
TOTAL PERSONNEL COSTS:					
OPERATING EXPENDITURES **by summary object:**					
TOTAL OPERATING EXPENDITURES:					
CAPITAL OUTLAY **by summary object:**					
TOTAL CAPITAL OUTLAY:					
T/B PAYMENTS:	$125,000		$462,000		$587,000
LUMP SUM:					
GRAND TOTAL	$125,000		$462,000		$587,000

Supports institution/agency and Board strategic plans:

Goal 1 Objective 1

Objective: To provide customers with effective job supports including adequate job training to increase employment stability and retention.

Performance Measure: To enhance the level of job preparedness services to all customers.

Description:
Vocational Rehabilitation (VR) is requesting an additional $125,000 in State funds and $462,000 in Federal funds to have a sufficient amount of funds available to pay for assessment, training, tools, education, supplies, transportation, and other items to assist youth and students with disabilities as well as nonstudents and adults with disabilities prepare for and/or secure employment. Under the Workforce Innovation and Opportunity Act (WIOA), Idaho is required to spend 15% of its VR grant on certain qualified students with disabilities, pre-employment transition services, and assisting students with disabilities transition to work. Furthermore, VR is experiencing an approximate 7% increase in service expenditures annually. The additional funds will be used to meet the student transition requirement of WIOA as well as meet the needs of all eligible nonstudent and adult populations being served by VR in Idaho.

VR is a ticket to self-sufficiency for Idahoans with disabilities. It is not another welfare program. VR services for eligible Idahoans with disabilities are the enabling tools to transition from unemployment to gainful employment; from dependence to independence. For Federal fiscal year 2015, 85% of VR customers who achieved or maintained employment reported their wages as their primary means of support instead of depending on public support and family support. Not only does an investment in VR reduce the amount of public support required, it also returns funds to the State of Idaho. Based on Federal Fiscal Year 2015 data it is estimated that a State investment of $125,000 will return over $1.3 million in direct sales tax and income tax to the State. That is a return on investment of over $11 to $1. In addition, it will increase Idaho's other taxes, such as property and gas tax, and reduce the amount of public assistance to those individuals served. This is a good investment for Idaho and unlike many other government programs; it returns more dollars than are invested by the State.

The addition of $587,000 in appropriations will allow Idaho to capture all of the funds allotted to it by the Federal Government. Without the State General Fund match of $125,000, Idaho will lose $462,000 in Federal funds set aside for Idaho. Furthermore, as a result of Federal funds being returned by other states that cannot meet their match, Idaho has the opportunity to capture even more Federal funds to assure adequate service delivery to all eligible Idahoans. Through this additional appropriation, it will also allow VR to help more Idahoans with disabilities move into the workforce. The emphasis will be on helping students with disabilities transition into the workforce, which will provide the biggest benefit to Idaho. Currently the average age of a VR customer is 38. Involving those with disabilities at a younger age means that independence for those with disabilities will start earlier and reduce the amount of public assistance needed by them. Transitioning students to the workforce should have an even bigger return on investment to the State of Idaho than mentioned above. The additional funds will not only assist those in need, but will also provide a great return on investment for Idaho.

Questions:

1. What is being requested and why? What is the agency staffing level for this activity and how much funding by source is in the base?

IDVR is requesting additional State and Federal funds to be able to meet the program requirements of the Federal Workforce Innovation and Opportunity Act (WIOA). The request is for VR to strategically plan for the increase of service costs as well as the shift in program emphasis required by Pre-Employment transition services. Without this increase the Division may not be able to meet the requirements WIOA and the needs of the Vocational Rehabilitation program. If that was the case then IDVR would need to adjust how the program operates in Idaho and would not be able to serve all eligible individuals with disabilities who need services. The VR program would need to implement an Order of Selection (OOS).

2. What resources are necessary to implement this request?

   a. List by position: position titles, pay grades, full or part-time status, benefit eligibility, anticipated dates of hire, and terms of service.

      None

   b. Note any existing human resources that will be redirected to this new effort and how existing operations will be impacted.

      None

   c. List any additional operating funds and capital items needed.

      None

3. Provide additional detail about the request, including one-time versus ongoing. Include a description of major revenue assumptions, for example, whether there is a new customer base, fee structure changes, or anticipated grant awards.

   This will allow VR to use all of the Federal funds allocated to the State. Annually, the Federal grant award increases by 1-3%. The $125,000 in General Fund appropriations will allow Idaho to capture an additional $462,000 of Federal Funds and also meet the requirements of WIOA. Idaho does not want to remit any portion of its allotment to other states as it has prior to SY 2017. Furthermore, this will allow VR to capture funds remitted by other states. This will allow Idaho to invest its full Federal allotment of over $16 million in Idaho; where Idaho will receive a return on the investment. The grant funds are ongoing in subsequent years.

4. Who is being served by this request and what are the expected impacts of the funding requested? If this request is not funded who and what are impacted?

This request will allow VR to continue to serve all of our customers without limiting available services. It will also allow Idaho to invest it share of this Federal grant in Idaho, where it has been returning in excess of $11 in sales and State income tax for every $1 invested by the State.

AGENCY: Division of Vocational Rehabilitation Agency No.: 523 FY 2018 Request
FUNCTION: CDHH Administration Function No.: 06 Page 1 of 5 Pages
Original Submission _X_ or
ACTIVITY: CDHH Activity No.: Revision No. ___

A: Decision Unit No: **12.03** Title: **Community Outreach** Priority Ranking 3 of 4

DESCRIPTION	**General**	**Dedicated**	**Federal**	**Other**	**Total**
FULL TIME POSITIONS (FTP)	1.00				1.0
PERSONNEL COSTS:					
1. Salaries	$64,600				$64,600
2. Benefits	23,100				23,100
3. Group Position Funding					
TOTAL PERSONNEL COSTS:	$87,700				$87,700
OPERATING EXPENDITURES **by summary object:**					
1. Travel	$2,300				
2. Communication	10,000				$2,300
Accommodations	1,200				10,000
3. Cell Phone	2,400				1,200
4. Office Lease					2,400
TOTAL OPERATING EXPENDITURES:	$15,900				$15,900
CAPITAL OUTLAY **by summary object:**					
1. PC and workstation	$3,400				$3,400
TOTAL CAPITAL OUTLAY:	$3,400				$3,400
T/B PAYMENTS:					
LUMP SUM:					
GRAND TOTAL	$107,000				$107,000

Supports institution/agency and Board strategic plans:

Goal 1 Objective 1
To increase the Idaho Council for the Deaf and Hard of Hearing (CDHH) by one (1) additional Full Time Employee (FTE) identified as Communication and Outreach Coordinator in order to increase outreach and education.

Performance Measure:
To increase access and education to all Idahoans to include those who are deaf and hard of hearing.

Description:

The Idaho Council for the Deaf and Hard of Hearing is requesting an additional one (1) Full Time Employee (FTE) identified as Communication and Outreach Coordinator to assist in meeting their mission

Questions:

1. What is being requested and why? What is the agency staffing level for this activity and how much funding by source is in the base?

   The Council for the Deaf and Hard of Hearing is requesting one (1) additional Full Time Employee (FTE) identified as Communication and Outreach Coordinator. The Council for the Deaf and Hard of Hearing is a unique state agency following its mission of being "Dedicated to making Idaho a place where persons, of all ages, who are deaf or hard of hearing have an equal opportunity to participate fully as active, productive and independent citizens." Using the formula of 13% provided by the Gallaudet Research Institute, an estimated 203,785 people in Idaho have hearing loss:

Total Idaho Population	1,567,582
Total Hearing Loss	203,785 (13%)
Severe Hearing Loss	34,486 (2.2%)
Profound Hearing Loss (deaf)	3,448 (.22%)

   Currently, there are only 2 FTE's working for the Council, the Executive Director and an Administrative Assistant. With the establishment of Idaho Sound Beginnings (newborn hearing screening) children who have hearing loss are being identified earlier, baby-boomers are increasing and veterans are returning to civilian life. The aforementioned causes the need for an additional staff member to provide specific functions for the Council. The role of the Communication and Outreach Coordinator would be to increase awareness of the Council's role, services and programs throughout the state of Idaho. Strategies may include developing collaborations with community organizations, staffing exhibit tables at expos, providing training sessions, educating on legal obligations to comply federal and state laws related accessibility and accommodations, developing and disseminating information and resources, and managing external and internal communications.

   One-time funds for initial office set up include desk, chair, desktop/laptop computers, monitors, warranties, and docking station.

   Currently there is no agency staffing for this position and no funding by source is in the base.

2. What resources are necessary to implement this request?

   a. List by position: position titles, pay grades, full or part-time status, benefit eligibility, anticipated dates of hire, and terms of service.

      The title of this position is: Communications and Outreach Coordinator

      Pay Grade: K

      Full Time Status

      Full Benefits

      Anticipated Date of Hire: July 1, 2018

      Terms of Service: NA

   b. Note any existing human resources that will be redirected to this new effort and how existing operations will be impacted.

      Existing Human Resources would be redirected to hire candidate. If this position were approved and funded, it would allow the two current staff members to spend 100% of their time on their assigned duties.

      Currently the Executive Director and Administrative Assistant are the only staff involved in providing information, workshops, presentations, and everyday operations of the Council. This position would relieve some of the burdens of the current staff to provide the necessary services dictated by Idaho Code Chapter 13, Title 33

   c. List any additional operating funds and capital items needed.

      Additional operating funds:

Office lease $200/mo	$ 2,400.00 annually
Cell Phone	$ 1,200.00 annually
Overnight travel ~ 10 x ~ 80	$ 800.00 annually
Per Diem ~ 20 x 33.00	$ 660.00 annually
Flights ~ 2 @ $400	$ 800.00 annually
Communication/accommodation svs	$10,000.00 annually
TOTAL Additional Operating Funds	$15,860.00

      Capital Items

Desk	$740.00
Chair	$570.00
Desktop	$650.00
Desktop Warranty	$ 60.00
Laptop	$970.00
Laptop Warranty	$100.00
Docking Station	$160.00
Monitors	$160.00 Each
Total Capital Funds	$3,410.00

3. Provide additional detail about the request, including one-time versus ongoing. Include a description of major revenue assumptions, for example, whether there is a new customer base, fee structure changes, or anticipated grant awards.

Ongoing request	$ 103,655
One Time request	$ 3,410.00

   All funds will be from General Funds. There are no expectations of additional grant monies or federal monies. There are no external funding available that is in line with the objectives, mission and responsibilities/duties of the Council.

   If the request is not funded, CDHH will be unable to fully utilize the collaborative relationship with community organizations, local and state governmental entities, and proactively develop a presence for our Council and the programs and services provided.

4. Who is being served by this request and what are the expected impacts of the funding requested? If this request is not funded who and what are impacted?

   Idaho policymakers, the legislators, local, state agencies, businesses, and the 203,785 deaf and hard of hearing citizens will be served by this request. We anticipate the population to grow. This request allows for areas that are not currently served by the limited staff of CDHH to be included in the mission of the Council.

   It has been over 24 years, since the inception of the Council, without any significant increase in FTE that serves the constituents and/or stakeholders directly. For the past two decades the deaf and hard of hearing population grew and assimilated much more deeply into the society more than ever before which demands more information and resources. The current staff finds it very difficult meeting the growing demands.

If this request is not funded, Idaho's deaf and hard of hearing population will continue to be underserved.

5. If this is a high priority item, list reason why unapproved Line Items from the prior year budget request are not prioritized first.

Request for FTE was presented on our line item last year which was not recommended by the Governor.

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AGENCY: Division of Vocational Rehabilitation	Agency No.:	523	FY 2018 Request
FUNCTION: Council for the Deaf and Hard of Hearing (CDHH) Administration	Function No.	06	Page ___ of __ Pages
ACTIVITY: CDHH	Activity No.:		Original Submission _X_ or Revision No. ___

A: Decision Unit No: **12.04**	Title: **Increase Spending Authority**		Priority Ranking 4 of 4		
DESCRIPTION	**General**	**Dedicated**	**Federal**	**Other**	**Total**
FULL TIME POSITIONS (FTP)					
PERSONNEL COSTS: 1. Salaries 2. Benefits 3. Group Position Funding					
TOTAL PERSONNEL COSTS:					
OPERATING EXPENDITURES **by summary object:**				$3,000	$3,000
TOTAL OPERATING EXPENDITURES:				$3,000	$3,000
CAPITAL OUTLAY **by summary object:**					
TOTAL CAPITAL OUTLAY:					
T/B PAYMENTS:					
LUMP SUM:					
GRAND TOTAL				$3,000	$3,000

Supports institution/agency and Board strategic plans:

Goal 1 Objective 1

To increase the amount of spending authority for CDHH

Description:

CDHH receives various donations from outside sources to assist in the support of CDHH with annual deaf awareness events.

Questions:

1. What is being requested and why? What is the agency staffing level for this activity and how much funding by source is in the base?
    a. An on-going $3,000 spending authority for existing PCA (64040) fund to support and reimburse for expenses incurred for annual state-wide deaf awareness day event. The sources of funding solely come from private donations by corporate and non-profit entities.

    b. This request is to allow CDHH to have the spending authority for donated funds to assist them with sponsorships for the programs awareness events.

    c. Insignificant staffing level is required to manage this activity.

2. What resources are necessary to implement this request?
    a. List by position: position titles, pay grades, full or part-time status, benefit eligibility, anticipated dates of hire, and terms of service.

       None.
    b. Note any existing human resources that will be redirected to this new effort and how existing operations will be impacted.

       None.
    c. List any additional operating funds and capital items needed.

       None.

3. Provide additional detail about the request, including one-time versus ongoing. Include a description of major revenue assumptions, for example, whether there is a new customer base, fee structure changes, or anticipated grant awards.

    a. This is an on-going request. Annual Idaho Deaf Awareness Day (IDAD) event is run through partnerships with various deaf and hard of hearing based entities, and non-profit organizations. The cost to host this event depends on monetary donations and sponsorships from private entities. The purpose of this event is to bring awareness on deafness. This event is open to the public.

    b. No grants will be received or used.
4. Who is being served by this request and what are the expected impacts of the funding requested? If this request is not funded who and what are impacted?

    a. This request will enable us to reimburse any expenses incurred by the partnership organizations to host the event.

b. If the request is not funded, the Council will not be able to follow the statutory mandates set by the Idaho code. Furthermore, the partnership organizations will not be able to be reimbursed for the expenses incurred in supporting the event.

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SUBJECT

FY 2018 Capital Budget Requests

APPLICABLE STATUTE, RULE, OR POLICY

Idaho State Board of Education Governing Policies & Procedures, Section V.B.8. and Section V.K.

BACKGROUND/DISCUSSION

The capital projects request process is separate from the line item budget request process. The Permanent Building Fund Advisory Council (PBFAC), which is supported by the staff of the Division of Public Works (DPW), has three major areas of focus when it considers and develops recommendations on institutional and agency requests for fiscal year construction projects: a) major new construction or remodeling projects, typically costing well over $1M (referred to as “Capital” or “Part A” projects); b) smaller alteration and repair projects (referred to as “A&R” or “Part B” projects); and c) projects to comply with the Americans with Disabilities Act (“ADA” projects). DPW kicked off this year’s capital budget request and facilities needs process with a letter (26 April 2016) to all institutions and agencies asking for FY2018 Permanent Building Fund requests for capital projects and A&R projects to be submitted in preliminary form by June 1st, with detailed requests due to DPW by August 1st, accompanied by updates to the institutions’ rolling six-year capital project budget (“Part C”) plans. The PBFAC will hear agency/institution capital project, A&R, and ADA requests on October 4, 2016. Subsequently, DPW and the PBFAC will review all requests for projects involving Permanent Building Fund (PBF) dollars, and will develop a (much scaled-down) list of recommended projects for all state entities to fit the projected available PBF dollars for the upcoming legislative cycle. DPW will work with the Division of Financial Management (DFM) and the Legislative Services Office (LSO) to develop, in turn, the Governor’s recommendation and the Legislature’s appropriation for capital, A&R, and ADA projects.

The construction and maintenance needs of the higher education institutions (with deferred maintenance needs estimated in hundreds of millions of dollars) far exceed the PBF dollars available for rationing by the PBFAC, Governor and Legislature. For example, for FY2017, approximately $29.6M in PBF funding was available (approximately $10.9M for capital projects, $17.5M for A&R projects, and $1.3M for ADA, asbestos, and Capitol Mall parking projects) to address over $160M in statewide requests.

This agenda item deals with Board approval only for the capital project (Part A) requests and projected six-year capital project plans (Part C) from the four 4-year institutions and the technical college. Summaries of the community colleges’ capital project requests are provided for information only—those requests are vetted by the community colleges’ local governing boards prior to submission to PBFAC. This agenda item does not deal with A&R and ADA requests. Institution capital budget requests and projected six-year capital plans are shown beginning on Page 5. Projects shown have been prioritized by each institution. A number of these projects were also included in the FY 2017 institution request lists previously approved by the Board. The project descriptions provided below were prepared by the institutions.

Review of FY2017 PBF appropriations:
In FY2017, Boise State University (BSU) was funded $2,500,000 for its Fine Arts Building as the second half of the state contribution for the total $5,000,000 request. The University of Idaho (UI), Lewis-Clark State College (LCSC), and North Idaho College (NIC) were funded an additional $1,000,000 for their North Idaho Collaborative Education Facility.

FY2018 Capital Project Requests:
BSU's first priority is for a Center for Materials Science. The new building will house the Materials Science program which will support the initiatives to grow the Science, Technology, Engineering, and Mathematics (STEM) disciplines. The building will be approximately 85,000-100,000 square feet and include research laboratories, teaching laboratories and support areas including offices, seminar rooms and common areas. The project will also include a large 250 seat lecture hall, and two 80 seat classrooms to help address the current lack of adequate large classroom spaces. Funding sources include $10M from the Permanent Building Fund (PBF) and $40M from University funds and private donations.

ISU's first priority is for remodeling the 3rd and 4th floors of the Gale Life Science building. This project will upgrade building infrastructure including electrical, water, and HVAC systems and remodel lab spaces. Funding sources include $10M from the PBF and $2M from ISU.

UI's first priority is for a 6,000 square foot addition to an existing building which will provide needed expansion space for its growing medical education program. Program space needs are growing rapidly to accommodate 80 students at a time compared to only 20 students previously. The $2.4M needed for the expansion will come entirely from PBF funds after the building is converted to WWAMI use using WWAMI program reserves and private donations.

LCSC's first priority is for a Living and Learning Complex. The 60,000 square foot building would be a combined-use residential and classroom facility with approximately 44,500 square feet related to dormitory, dining and fitness space with the remaining space dedicated to classroom, counseling, health and other areas. Funding for the dormitory related space would come from LCSC funds while the remaining space will be funded from the $2.0M PBF funds.

The community colleges' six-year capital construction listed for information only. Each of the community colleges has one capital project PBF request for FY 2018.

The College of Southern Idaho's request is for $825,000 for the remodel and modernization of 25,000 square feet of existing classrooms and offices constructed in 1976. All funding is from PBF funds.

The College of Western Idaho's (CWI) request is for $750,000 for the design and site development for their Boise campus building located at Main and Whitewater Blvd. All other costs for this $59.3M project will be funded from CWI funds. New owned facilities are required for accreditation to support long-term feasibility and to better serve the community. It is anticipated that this first phase building will support approximately 200,000 square feet.

North Idaho College's request is for $850,000 for the remodel of the 9,500 square foot Hedlund Building into the Hedlund Black Box Theater. All funding is from PBF funds.

IMPACT

Only Board-approved major capital projects can be forwarded to the PBFAC. Following Board approval, DPW, PBFAC, DFM, and LSO will be informed of the Board's recommendations. A Board representative will brief the PBFAC on the Board's decision and any comments at the October 4th PBFAC meeting, prior to agency presentations of their FY2018 requests.

Board Policy V.K. requires institutions to bring their six-year capital project plans to the Board for review and approval at its regularly scheduled August meeting. These plans span six fiscal years going forward, starting with the upcoming fiscal year (FY2018). Board approval of a six-year plan constitutes advance notice to the Board that an institution or agency may bring a request at a later date for approval for planning and design for one or more of the projects in the institution plan. The institutions can, and very frequently do, update the years two through six components of their six-year plans, based on the approved funding and outcomes of their year one requests. Board approval of the six-year plans also allows the institutions to solicit and accept gifts in support of the projects listed in the approved plans.

ATTACHMENTS

Attachment 1-FY18 Major Capital Request Summary	Page 5
Attachment 2-Boise State University Six-year Plan	Page 7
Attachment 3-Idaho State University Six-year Plan	Page 8
Attachment 4-University of Idaho Six-year Plan	Page 9
Attachment 5-Lewis-Clark State College Six-year Plan	Page 11
Attachment 6-Eastern Idaho Technical College Six-year Plan	Page 12
Attachment 7-Capital Project Summaries for agencies & institutions	Page 13

STAFF COMMENTS AND RECOMMENDATIONS

Although current levels of funding from the PBF and other sources are not sufficient to meet the facility needs of the institutions, it is appropriate for the institutions and the Board to highlight the most urgent infrastructure needs in the system. An effective review and rationing system is in place to allocate available dollars to the highest need projects for the FY2018 budget cycle. The FY2018 capital project requests from the institutions are reasonable, and they reflect continuity with previous capital planning efforts. The longer-term wish lists in the rolling six-year capital plans, while largely hypothetical, are a useful advance planning tool. Staff recommends approval of the institutions' FY2018 capital project requests and their six-year capital project plan projections.

BOARD ACTION

I move to approve the capital projects listed in the table in Attachment 1 on Page 5 from Boise State University, Idaho State University, the University of Idaho, and Lewis-Clark State College for submission to the Permanent Building Fund Advisory Council for consideration for Permanent Building Fund support in the FY2018 budget cycle.

Moved by __________ Seconded by ___________ Carried Yes _____ No _____

AND

I move to approve the Capital Budget Request Six-Year Plans for FY2018 through FY2023 for Boise State University, Idaho State University, the University of Idaho, Lewis-Clark State College, and Eastern Idaho Technical College, as provided, for submission to the Permanent Building Fund Advisory Council for consideration in the FY2018 budget cycle.

Moved by __________ Seconded by ___________ Carried Yes _____ No _____

State Board of Education

FY18 Major Capital Request Summary

($ in thousands)

	Board Priority	Institution/Agency & Project	Detail Page	Total Project Cost: Perm. Building Fund	Total Project Cost: Total Funds	FY 2018 Request
1		**Boise State University**				
2	1	Center for Materials Science	13	10,000.0	50,000.0	10,000.0
3	2	College of Innovation and Design	17	10,000.0	12,000.0	10,000.0
4	3	Science Laboratory Building	21	10,000.0	15,000.0	10,000.0
5		**Idaho State University**				
6	1	Gale Life Science Building, 3rd and 4th floors	25	10,000.0	12,000.0	5,000.0
7	2	Eli Oboler Library, replace HVAC and duct work	27	6,000.0	6,000.0	6,000.0
8	3	Graveley Hall, upgrade heating and cooling system	29	2,875.0	2,875.0	2,875.0
9	4	Beckley Nursing Asbestos Mitigation, ceiling/lights	31	1,700.0	1,700.0	1,700.0
10		**University of Idaho**				
11	1	WWAMI Education Building Improvements/Expansion	33	2,400.0	2,400.0	2,400.0
12	2	Library Special Collections and Archive Improvements	37	5,640.0	5,640.0	2,800.0
13	3	Research and Classroom Facility	43	8,000.0	24,000.0	4,000.0
14		**Lewis-Clark State College**				
15	1	Living and Learning Complex	49	2,000.0	17,000.0	2,000.0
16		**College of Southern Idaho**				
17	1	Canyon Building Remodel and Modernization	51	825.0	825.0	825.0
18		**College of Western Idaho**				
19	1	Boise Campus Building & Site Development	52	750.0	60,000.0	750.0
20		**North Idaho College**				
21	1	Hedlund Black Box Theater Remodel	53	850.0	850.0	850.0
22						
23		**Total**		$ 71,040.0	$ 210,290.0	$ 59,200.0

Note: Information in the table above on the Community College capital project requests is provided for information only—Board approval for these requests is not required.

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Set C

SIX YEAR CAPITAL IMPROVEMENT PLAN
FY 2018 THROUGH FY 2023

($ in 000's)

Institution: Boise State University

Project Title	Est. Cost	*Prev. Fund.*	FY2018 PBF	FY2018 Other	FY2018 Total	FY2019 PBF	FY2019 Other	FY2019 Total	FY2020 PBF	FY2020 Other	FY2020 Total	FY2021 PBF	FY2021 Other	FY2021 Total	FY2022 PBF	FY2022 Other	FY2022 Total	FY2023 PBF	FY2023 Other	FY2023 Total
New Student Housing (Honors Live/Learn Community - Public/Private Partnership, In Construction)	40,000			40,000	40,000															
Student Housing - Food Service (Honors Live/Learn Community)	3,000			3,000	3,000															
Fine Arts Building	42,000	5,000		5,000	5,000		32,000	32,000												
College of Innovation and Design	12,000		10,000	2,000	12,000															
Center for Materials Research (2nd of 4 building science complex)	48,500		10,000	20,000	30,000		18,500	18,500												
Campus Planning and Facilities Structure	1,500			1,500	1,500															
Science Laboratory Building	15,000		10,000	5,000	15,000															
Downtown Parking Spaces	1,500			1,500	1,500															
On-Campus Parking Structure (750 spaces @ $20,000)	15,000						15,000	15,000												
Renovate Liberal Arts & Campus School (Planning, Design, Construction)	3,300					300		300	1,000	2,000	3,000									
Hemingway Building - Restoration	1,000						100	100	900		900									
Health Sciences Building	30,500												30,500	30,500						
Athletics/Kinesiology Multi-Use Facilities	60,000														10,000		10,000	25,000	25,000	50,000
Science Research Building (3rd of 4 building science complex)	89,000											500	500	1,000	4,000	4,000	8,000	40,000	40,000	80,000
Total	362,300	5,000	30,000	78,000	108,000	300	65,600	65,900	1,900	2,000	3,900	500	31,000	31,500	14,000	4,000	18,000	65,000	65,000	130,000

Other, not currently scheduled priorities

Central/District Chilled Water Plant	10,000	Albertons Library - River Side Addition	2,500
Combined Heat/Power Plant	20,000	Student Shop Development	10,000
Administrative Services Building(s)	23,000	High Bay Academic/Research Industrial Space	3,000
Albertsons Stadium Expansion and Improvements	28,000	University Drive Improvements	4,000
New Athletics Field	5,000	Beacon Street Improvements	1,000
Athletics Facilities Upgrades	2,000	General Assignment Classroom Building #2	30,000
Department of Public Safety, New Facility	8,000	Future Parking Structure (750 Spaces @ $20,000)	15,000
Literacy Center	8,000	New Science Greenhouses	1,500
Develop Campus Quad Spaces	2,000	Vivarium Expansion	1,600
Engineering & Technology Room 103 & 110 - Classroom Renovations	1,500	Construction Management Facility	3,000
Signage and Wayfinding, All Phases	2,500	Student Housing	40,000
Subtotal #1	**110,000**	Subtotal #2	**111,600**
Grand Total: Other, not currently scheduled priorities:	**221,600**		

Idaho State
UNIVERSITY

DPW FY 2018 Request

Six Year Capital Improvement Budget

Description	**FY 2018**	**FY 2019**	**FY 2020**	**FY 2021**	**FY 2022**	**FY 2023**
Gale Life Science Remodel Building Infrastructure and 3rd and 4th Floor	$5,000,000	$5,000,000				
Oboler Library - replace HVAC/duct work, ceiling, seismic compliance		$6,000,000				
Graveley Hall - Upgrade the heating and cooling system		$2,875,000				
Beckley Nursing – Asbestos mitigation, ceiling system and lights		$1,700,000				
Expansion of Dental Health Program and Physical and Occupational Therapy - Meridian			$2,791,770			
Vocarts - Replace, HVAC , Elevators, Fire Alarm & ADA restrooms			$1,745,842			
Complete renovation ISU-Meridian build out*			$4,000,000			
Remodel LEL second floor for additional labs *			$1,050,000			
Campus Housing Renovations & Remodeling*			$10,000,000			
New Museum of Natural History*			$22,444,000			
College of Business - Modernization*				$25,000,000		
Engineering Research Complex Renovation - Phase 3*				$2,036,000		
Renovation/Addition of Life Sciences*				$40,885,920		
Reroute campus traffic*					$8,000,000	
Addition to Beckley Nursing*						$14,208,000
Addition to College of Engineering*						$12,000,000
Renovation of College of Business – front entry*						$1,300,000
$166,036,532	$5,000,000	$15,575,000	$42,031,612	$67,921,920	$8,000,000	$27,508,000
6 year outlay total						

***Some Projects with no F.F.E. money**

SET C: SIX YEAR CAPITAL IMPROVEMENT PLAN (Major Capital Projects)
FY 2018 THROUGH FY 2023
($ in 000's)

Institution: University of Idaho

			FY 2018			FY 2019			FY 2020			FY 2021			FY 2022			FY 2023		
Project Title	Est. Cost	*Prev. Fund.*	PBF	Other	Total	PBF	Other	Total	PBF	Other	Total	PBF	Other	Total	PBF	Other	Total	PBF	Other	Total
Education Building Renovation and Asbestos Remediation	17,160	17,160	In Punchlist Status as of 1 Aug 16																	
Integrated Research and Innovation Center	52,736	52,736	In Construction Status as of 1 Aug 16																	
Wallace Residence Center Refresh	5,000	5,000	In Construction Status as of 1 Aug 16																	
Life Sciences South Standby & Emergency Generator (Life Safety)	835	835	In Construction Status as of 1 Jul 16																	
McCall Outdoor Science School & Field Campus New Shower House & Restroom Facility	825	825	In Construction Status as of 1 Jul 16																	
Aquaculture Research Facility	2,350	2,350	In Award Status as of 1 Aug 16																	
Admin Bldg. Entry Foyer & Stair Life Safety Imp & Renovations	948	948	In Award Status as of 1 Aug 16																	
Agricultural Sciences East Entrance & ADA Improvements	510	510	In Design Status as of 1 Aug 16																	
Buchanan Engineering Lab Life Safety Improvements, Phase 2	902	902	In Design Status as of 1 Aug 16																	
Northern Idaho Collaborative Education Facility	9,728	9,728	In Design Status as of 1 Aug 16																	
Swim Center Replace Pool Gutters and Tile	960	960	In Design Status as of 1 Aug 16																	
Administration Building Exterior Envelope Repair	1,004	1,004	In Design Status as of 1 Aug 16																	
University House	1,950	1,950	In Planning Status as of 1 Aug 16																	
Renfrew Hall Classrooms 111 & 112 Improvements	1,000	400		600	600															
WWAMI Medical Education Building Improvements and Expansion	2,400	0	2,400		2,400															
Library Special Collections and Archive Improvements	5,640	0	2,800		2,800	2,840		2,840												
Research and Classroom Facility	24,000	0	4,000		4,000	4,000	16,000	20,000												
Western Initiative for Dairy Environment (WIDE)	tbd	0					tbd	tbd												
Life Sciences South HVAC Upgrades, Phase 3	1,180	0				1,180		1,180												
Gibb Hall HVAC, Phase 2	1,178	0				1,178		1,178												
Administration Building HVAC, Phase 2	1,237	0							1,237		1,237									
Janssen Engineering Building HVAC, Phase 4	619	0										619		619						
Gibb Hall HVAC, Phase 3	1,237	0										1,237		1,237						
Idaho Avenue Extension Repairs and Repaving	887	0										887		887						
Domestic Water System Replace AC Mains, Phase 1	703	0													703		703			
Campus Drive / Administration Circle Repairs, Phase 1	779	0													779		779			
Perimeter Drive Replace Paradise Creek Undercrossing	893	0													893		893			
Steam Plant Emergency Generator	974	0																974		974
Nez Perce Drive Reconfiguration and Rebuild	773	0																773		773
Domestic Water System Replace AC Mains, Phase 2	549	0																549		549
Menard Law Building Replace Roof	517	0																517		517
Coll. of Agricultural & Life Sciences New Meats Laboratory #	7,220	0																		

SET C: SIX YEAR CAPITAL IMPROVEMENT PLAN (Major Capital Projects)
FY 2018 THROUGH FY 2023
($ in 000's)

Institution: University of Idaho

			FY 2018			FY 2019			FY 2020			FY 2021			FY 2022			FY 2023		
Project Title	Est. Cost	*Prev. Fund.*	PBF	Other	Total	PBF	Other	Total	PBF	Other	Total	PBF	Other	Total	PBF	Other	Total	PBF	Other	Total
McCall Field Campus Improvements per the 2014 Master Plan #	7,000	0																		
Wallace Residence Center Dining Facility Improvements (Bob's Place) #	1,000	0																		
Pedestrian Walkway Improvements #	1,000	0																		
New Undergraduate Housing, Phase 1 #	36,000	0																		
ROTC Facility #	3,000	0																		
Basketball Arena #	tbd	0																		
	194,694	95,308	9,200	600	9,800	9,198	16,000	25,198	1,237	0	1,237	2,743	0	2,743	2,375	0	2,375	2,813	0	2,813

S:\Facilities\CapitalPlanning\Capital Budget\FY 18 State Request\Six Year Plan (Set C)\FY 2018 Six Year Plan.*

CAPITAL BUDGET REQUEST
SIX-YEAR PLAN FY 2018 THROUGH FY 2023
CAPITAL IMPROVEMENTS

AGENCY: **Lewis-Clark State College**

PROJECT DESCRIPTION/LOCATION	FY 2018 $	FY 2019 $	FY 2020 $	FY 2021 $	FY 2022 $	FY 2023 $
Living and Learning Complex	$17,000,000					
Expansion of CPE (Auto repair/Diesel Mech)		$4,000,000				
Administrative Building upgrade			$3,500,000			
Workforce Training (WFT) facility replacement				$2,500,000		
Physical Plant Workshops/Offices upgrades					$2,000,000	
Sam Glenn Complex Upgrade						$2,500,000
TOTAL	$17,000,000	$4,000,000	$3,500,000	$2,500,000	$2,000,000	$2,500,000

Agency Head Signature: ______________________________

Date: ______________________________

CAPITAL BUDGET REQUEST
SIX-YEAR PLAN FY 2018 THROUGH FY 2023
CAPITAL IMPROVEMENTS

AGENCY: Eastern Idaho Technical College

PROJECT DESCRIPTION/LOCATION	FY 2018 $	FY 2019 $	FY 2020 $	FY 2021 $	FY 2022 $	FY 2023 $
Expanded Construction – Phase III of the Sessions Building				$ 6.0 M		
TOTAL	$ 0	$ 0	$ 0	$ 6.0 M	$ 0	$ 0

Agency Head Signature:

Date: 7/18/16

DPW 4.0 4/15

OFFICE OF THE STATE BOARD OF EDUCATION

SET A
PROJECT SUMMARY
FY2018

Project Title: **Construction** for **Center for Materials Science**

Institution/Agency: Boise State University

Brief Description: Boise State's Master Plan 2015 update targets the South Campus area for the science and engineering facilities called for in the Strategic Plan to boost research and creativity while creating a signature educational experience for both graduates and undergraduates. The requested funds will support partial construction of the second of four science buildings currently envisioned. This new building will house the Materials Science program, which is one of Boise State's growing research strengths and one that connects directly to the missions and needs of the businesses leading the state's strong tech economy.

Project Scope: 55,000- 65,000 **NASF** 85,000-100,000 **GSF**

Estimated Total Cost: $50,000,000

Estimated Partial Construction Cost: $10,000,000

Date Approved by State Board of Education:

Source of Construction Funds (by fund source and amount):

Total Project Cost

Fund Source	Amount
Permanent Building Fund	$10,000,000
University Funds & Private Donations	$40,000,000

Previous Appropriations

Fund Source	Amount
N/A	N/A

Budget Year Request

Fund Source	Amount
Permanent Building Fund	$10,000,000

1. PROJECT DESCRIPTION AND JUSTIFICATION

The proposed building will be the second building of the master-planned science and engineering complex in the South Campus zone. The first of these projects, the 101,265-square-foot multidisciplinary Environmental Research Building is home to Geosciences, Civil Engineering, Public Policy and Administration and Political Science, as well as the environmental finance office, the Public Policy Center and the Frank Church Institute and other parts of the new School of Public Service.

Consistent with the 2005 and 2015 Campus Master Plans, the new Center for Materials Science Research will support the University initiatives to grow the STEM disciplines (Science, Technology, Engineering and Mathematics) and support Idaho's and the Boise region's tech economy, and will be part of a complex designed to promote interdisciplinary research, education, and outreach. Each building of the complex will include science and engineering laboratories and facilities appropriate to specific interdisciplinary topic areas, with departmental culture preserved in office clusters. Future buildings in this area will be planned to promote collaboration between scientists and engineers on important research initiatives.

The Center for Materials Science Research will focus on Materials Science Engineering and provide a catalyst to elevating that program to national prominence. A program of such stature will enhance the growth of the high-tech, science and engineering-related industries and associated economic development in the Treasure Valley, Idaho and far beyond. The facility will be a major step toward achieving the first four goals outlined in Boise State's Strategic Plan, "Focus on Effectiveness," which include 1) Create a signature high-quality educational experience for all students; 2) Facilitate the timely completion of educational goals of our diverse student population; 3) Gain distinction as a doctoral research university; and 4) Align university programs and activities with community needs.

2. PROJECT COMPONENTS

The University retained a programming consultant to create a preliminary program for the building and to explore potential site locations. As currently programmed, the 85,000 to 100,000 square-foot Center for Materials Research will be a showcase for the program and will include research laboratories, teaching laboratories and associated support areas including faculty offices, staff office, graduate student spaces, seminar rooms and common areas. As currently envisioned, the building would be located on the block immediately west of the existing Engineering Building and Micron Technology Building to allow for close proximity to other collaborators in the engineering disciplines. The facility would also allow for co-location of materials researchers from all disciplines on campus.

In addition to the Materials Science spaces, a large 250 seat lecture hall, and two 80 seat classrooms have been included in the program for this building to help address the current lack of adequate large classroom spaces on the southeast portion of campus. These classrooms would be designed to support active learning, which supports lectures but also facilitates collaboration and small group work within the classrooms.

Prior to the start of construction, several occupants of the site will require relocation. These include Facilities Operations and Maintenance offices, Central Receiving, HAZMAT storage facility and the Construction Management program.

3. ALTERNATIVES

Modular facilities could possibly be utilized to provide additional research, classrooms, and offices, but the use of these temporary structures are expensive and only meet the short-term needs of the institution. It would not be prudent to utilize modular buildings for research or class laboratory space. The University has purchased land in the South Campus to accommodate this new facility. Investing in temporary modular facilities would neither be cost effective nor meet academic and research needs.

4. VACATED SPACES

In addition to providing up to date laboratory, classroom, and office space for the Materials Science department, this project would free up space currently occupied by that department in other campus buildings. These spaces would be made available to meet the critical classroom and faculty office space needs of other growing departments. Because planning is still in the early stages, the precise amount of space to be vacated is not defined.

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OFFICE OF THE STATE BOARD OF EDUCATION

SET A
PROJECT SUMMARY
FY2018

Project Title: **Construction** for **College of Innovation and Design**

Institution/Agency: Boise State University

Brief Description: Boise State's College of Innovation and Design (CID) is one of the youngest programs on campus, created in 2015 to meet the growing demand for flexible education tracks that focus on entrepreneurship, innovation, technology and teamwork. CID is currently located on the 1^{st} and 2^{nd} floors of the Albertsons Library in a combined area of roughly 10,000 square feet. Due to program success and increasing enrollment, CID will quickly outgrow this facility and require a dedicated space of its own. The requested funds will support the construction of an addition and partial renovation of the Barnes Towers to provide CID a space that consolidates all of its existing programs, as well as adequate space to grow in the future.

Project Scope: 32,000 – 36,000 **NASF** 45,000 – 52,000 **GSF**

Estimated Total Cost: $12,000,000

Date Approved by State Board of Education:

Source of Construction Funds (by fund source and amount):

Total Project Cost

Fund Source	Amount
Permanent Building Fund	$10,000,000
Boise State Funds	$2,000,000

Previous Appropriations

Fund Source	Amount
N/A	N/A

Budget Year Request

Fund Source	Amount
Permanent Building Fund	$10,000,000

1. PROJECT DESCRIPTION AND JUSTIFICATION

Since its inception in the Fall of 2015, CID has quickly grown its number of programs and total enrollment. The flexible class schedule and certifications have proven appealing to students from various fields of study. CID anticipates this growth to continue over the next four to five years, rapidly approaching space limitations of its current location. The Gaming, Interactive Media, and Mobile Technology (GIMM) program alone is expected to grow from 50-100 students to 300-400 over this five-year period. There is limited space available within the Library to accommodate this growth; Boise State is evaluating an expansion of CID's current space, which would double the existing footprint from 8,500 to roughly 17,000 square feet. Following this potential expansion, there is little to no space remaining the Library to expand without substantially impacting Library operations.

The proposed addition will likely be a two-story addition to Barnes Towers, a facility that vacates once the new Honors College and Residential Housing project is complete. Funding will also be placed toward the renovation of dormitory rooms so they better suit an office and/or administrative function. A building for CID is not specifically identified on the 2015 Campus Master plan. However, Barnes Towers is not scheduled for replacement in the near future. The façade of Barnes Towers will also receive aesthetic updates to compliment CID's mission and Boise State's material palette.

2. PROJECT COMPONENTS

Programmatically, CID requires a unique range of classrooms, offices, laboratories and maker spaces. For example, the GIMM program requires a high-tech laboratory space for students to development virtual reality applications and other media-based products. Classrooms, on the other hand, need to be fluid, taking advantage of movable furniture and layouts. As such, the facility will require a mix of dedicated spaces (maker spaces, laboratories, tool rooms, offices, etc.) as well as flexible meeting and/or instruction areas. For building efficiency purposes, the majority of the facility will consist of flexible instruction areas instead of dedicated rooms and offices, resulting in a facility with a high amount of assignable square footage.

3. ALTERNATIVES

There is limited potential for CID to continue expanding within Albertsons Library. The most immediate opportunity is an expansion on the Library's 2nd floor, adjacent to CID's current space assignment. CID's footprint would double through this expansion, providing a total space of roughly 17,000 square feet. This will enable the GIMM lab to be located within CID's footprint, as well as additional classrooms, offices and an events space. Unfortunately, certain program priorities are not obtainable through this expansion: high bay space and a tools lab for prototyping; an expansion of virtual reality equipment; additional offices, meeting rooms, drop-in stations, and classrooms to respond fully to CID's long-term programming goals. An expansion of CID into the first, third or fourth floors of the library will have a severe impact on library operations and is not being considered at this time.

A second alternative has CID split up and scattered across campus. There is no identified space for these placements and it's likely they would disrupt other programs.

4. VACATED SPACES

If the envisioned project is developed, CID's current location in the Albertson's Library will be vacated. At present, this represents roughly 8,500 square feet on the second floor and 1,500 square feet for the GIMM Lab on the first floor. These areas, by design, are not restrictive for subsequent tenants. Much of the 2nd-floor space has an open floor plan with movable furniture. The Library can easily re-occupy these areas and use them for instruction, meeting areas, or again as shelving for materials with minimal costs.

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OFFICE OF THE STATE BOARD OF EDUCATION

SET A
PROJECT SUMMARY
FY2018

Project Title:	**Construction** for **Science Laboratory Building**
Institution/Agency:	Boise State University
Brief Description:	Boise State continues to experience increased demand for classes and programs with laboratory-based instruction. Predominantly focused on the natural and applied sciences, these laboratories call for highly specific and dedicated environmental controls, as well as pedagogical improvements that create a signature education experiences for students. The requested funds will support a new laboratory facility providing teaching and/or research labs focusing on chemistry and biological sciences.
Project Scope:	16,000 – 22,000 **NASF** 25,000 – 34,000 **GSF**
Estimated Total Cost:	$15,000,000

Date Approved by State Board of Education:

Source of Construction Funds (by fund source and amount):

Total Project Cost

Fund Source	**Amount**
Permanent Building Fund	$10,000,000
University Funds & Private Donations	$5,000,000

Previous Appropriations

Fund Source	**Amount**
N/A	N/A

Budget Year Request

Fund Source	**Amount**
Permanent Building Fund	$10,000,000

1. PROJECT DESCRIPTION AND JUSTIFICATION

The proposed building will act as an extension of Boise State's Biology and Chemistry programs, departments within the College of Arts and Sciences. These programs currently operate primarily out of the Science Building, a four-story facility constructed in 1977. Some labs are also housed in the Multi-Purpose Classroom (MPC) Building. The Science Building has been modified numerous times throughout its history, in an effort to maintain pedagogical best practices, respond to University growth, and comply with facility safety requirements. In its current state, the Science Building continues to require several physical plant improvements, life/safety alterations, and classroom/laboratory improvements that will provide a cutting-edge academic and research environment.

The growth in STEM programs in the physical sciences as well as engineering has created a need for additional lower division teaching labs, especially those focused on biology, chemistry and physics. In addition, there is an increased demand for research spaces in these disciplines.

The proposed new Laboratory Building is identified on the 2015 Campus Master Plan and is intended to help meet the demand for teaching and research labs. At this time, it is represented by a "liner" building on the north façade of the Brady Garage and matching the facility's height. With 16,000 – 22,000 net assignable square feet (NASF), approximately 10-12 teaching and/or research labs could be provided in the facility. Labs would likely be focused on Chemistry or Biology. However, the labs could be used accommodate other STEM programs, such as Engineering Health Sciences and Physics. This building would likely provide space to accommodate departmental growth for the next 5-8 years.

This facility will help achieve two of Boise State's Strategic Plan goals: 1) Create a signature high-quality educational experience for all students; 2) Gain distinction as a doctoral research university.

2. PROJECT COMPONENTS

As envisioned, a new laboratory building will house teaching and/or research labs, prep areas, an instrumentation lab and informal student learning areas. Academic and research biology greenhouses would be installed on the roof of the new building to allow for access from the top floor of the garage. With a focus on instruction or research, there will be limited drop-in style spaces for faculty and graduate assistants and as a result, the building's program would not include typical enclosed faculty offices. This will maximize the total number of labs created by the project.

For life/safety compliance, each floor and laboratory will serve a dedicated purpose based on study topic and materials used. For example, labs using hazardous materials will be located on the ground floor, eliminating risks associated with upper levels. The facility will operate independently from the Brady Street Garage, with its own ingress and egress, as well as vertical circulation. In addition to the laboratory areas, the facility will also include lab preparation areas, an instrumentation room, informal learning areas for students, restrooms and other common areas.

3. ALTERNATIVES

Alternatives include converting existing classrooms into teaching and/or research labs. Any classrooms will have to be taken offline or re-created elsewhere appropriate swing space is not available on campus. Retrofitting classrooms into laboratories is costly, will require infrastructure improvements and work would have to be done in a piecemeal fashion to limit the impact on facility occupants. The most likely building for classroom conversions to laboratories is the Multi-Purpose Classroom (MPC) Building.

4. VACATED SPACES

The new Laboratory Building will help mitigate existing and some future demand. As such, minimal spaces will be vacated. Existing laboratories in the Science Building will retain their laboratory functions and will be repurposed/upgraded to accommodate new research.

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CAPITAL BUDGET REQUEST

FY 2018

CAPITAL IMPROVEMENT PROJECT DESCRIPTION

(New Buildings, Additions or Major Renovations)

AGENCY: Idaho State University AGENCY PROJECT PRIORITY: 1

PROJECT DESCRIPTION/LOCATION: Remodel Building Infrastructure and 3rd and 4th floor (5M/yr. over two years 2018 and 2019)

CONTACT PERSON: Cheryl Hanson TELEPHONE: (208) 282-2533

PROJECT JUSTIFICATION:

(A) Concisely describe what the project is.

This project will upgrade building infrastructure to include, but not limited to electrical, water, and HVAC systems as well as completely remodel the lab spaces on the top two floors.

(B) What is the existing program and how will it be improved?

Existing lab facilities were built in 1970 and the building infrastructure has not been substantially upgraded since then. There have been multiple remodels take place in the building with new systems of piping and wiring being hooked up to the aging and obsolete infrastructure in the building that has intermittent breakdowns that hinder the teaching and research that is conducted in the building. Some dangerous conditions also exist that need to be rectified including the electrical switchgear in the basement that is beyond its useable life and connects all four buildings in the complex together. Design/Planning should incorporate systems that can easily be adapted for future lab remodels that may include creating updated core facilities and team teaching approaches and research activities.

(C) What will be the impact on your operating budget?

Constant maintenance and repair of infrastructure demands inordinate amounts of attention to keep running and delivers less than optimal conditions for building occupants. Budgets will be positively impacted in facilities services and support for teaching and research will impact down times and lost revenues.

(D) What are the consequences if this project is not funded?

Building systems will continue to age and deteriorate at an exponential rate.

ESTIMATED BUDGET:		FUNDING:	
Land	N/A	PBF $10,000,000	
A/E fees	$1,500,000	General Account	
Construction	$9,900,000	Agency Funds	$2,000,000
5% Contingency	$600,000	Federal Funds	
F F & E	N/A	Other	
Other	$		
Total	$ 12,000,000	Total $12,000,000	

Agency Head Signature: ______________________________

Date: ______________________________

CAPITAL BUDGET REQUEST

FY 2018

CAPITAL IMPROVEMENT PROJECT DESCRIPTION

(New Buildings, Additions or Major Renovations)

AGENCY: Idaho State University	AGENCY PROJECT PRIORITY: 2

PROJECT DESCRIPTION/LOCATION: Replace HVAC/Ductwork, Ceiling, Seismic Compliance (3 projects: one each floor,$2 million/yr. for 3 years). Eli Oboler Library Bldg. # 50

CONTACT PERSON: Cheryl Hanson	TELEPHONE: (208) 282-2533

PROJECT JUSTIFICATION:

(A) Concisely describe what the project is.

This project will remove the deteriorating fiberboard air ducting system, and replace it with an insulated steel duct system. This project will also replace associated ceiling and lights in the affected areas.

(B) What is the existing program and how will it be improved?

The existing fiberboard ducting is actively degrading, with resulting ductwork particulates being spread throughout the library. All surfaces within the Library, including the ceiling, are coated with deteriorated ducting material. This project will remove the existing ceiling and lighting systems, remove all fiberboard ducting, address all seismic issues with the ceiling and lighting system, and with the book stacks throughout the Library. New insulated steel ducting, ceiling systems, and lighting will be installed.

(C) What will be the impact on your operating budget?

The maintenance budget will be relieved in several areas as less custodial effort will be required to clean the Library, and repair work to deteriorating ductwork will no longer need to occur.

(D) What are the consequences if this project is not funded?

Ductwork will continue to degrade and contaminate the interior of the Library. Additional efforts will continue to be expended in an attempt to clean the library.

ESTIMATED BUDGET:		FUNDING:	
Land		PBF	$ 6,000,000
A/E fees	$ 720,000	General Account	
Construction	$ 5,016,000	Agency Funds	
5% Contingency	$ 264,000	Federal Funds	
F F & E		Other	
Other			
Total	$ 6,000,000	Total	$ 6,000,000

Agency Head Signature: ______________________________

Date: ______________________________

CAPITAL BUDGET REQUEST

FY 2018

CAPITAL IMPROVEMENT PROJECT DESCRIPTION

(New Buildings, Additions or Major Renovations)

AGENCY: Idaho State University	AGENCY PROJECT PRIORITY: 3

PROJECT DESCRIPTION/LOCATION: Upgrade Heating and Cooling System/ Graveley Hall Building #15

CONTACT PERSON: Cheryl Hanson	TELEPHONE: (208) 282-2533

PROJECT JUSTIFICATION:

(A) Concisely describe what the project is.

This project will remove the old window mounted room air conditioners and steam heat perimeter supply with a central system that addresses the need for fresh air and heating in an economical solution.

(B) What is the existing program and how will it be improved?

The existing systems are failing and costly to run and repair and replace and the air conditioning units are providing a lot of bird habitat. The new system will deliver fresh air, conditioned in a central system and augment the existing perimeter steam heating systems to cover all areas of the building. Poor piping insulation on the steam heat will be replaced so that A/C units are not being run in the winter to cool down rooms.

(C) What will be the impact on your operating budget?

The maintenance budget will be relieved in several areas as less work will be needed to maintain individual units than one building system that can be put on our centralized controls.

(D) What are the consequences if this project is not funded?

Building systems are continuing to deteriorate and require excessive maintenance and costs.

ESTIMATED BUDGET:		FUNDING:	
Land		PBF	$ 2,875,000
A/E fees	$ 287,500	General Account	
Construction	$ 2,443,750	Agency Funds	
5% Contingency	$ 143,750	Federal Funds	
F F & E		Other	
Other			
Total	$ 2,875,000	Total	$ 2,875,000

Agency Head Signature: ______________________________

Date: ______________________________

CAPITAL BUDGET REQUEST

FY 2018

CAPITAL IMPROVEMENT PROJECT DESCRIPTION

(New Buildings, Additions or Major Renovations)

AGENCY: Idaho State University AGENCY PROJECT PRIORITY: 4

PROJECT DESCRIPTION/LOCATION: Asbestos Mitigation, Replace Ceiling system and Lighting/ Beckley Nursing Building #66

CONTACT PERSON: Cheryl Hanson TELEPHONE: (208) 282-2533

PROJECT JUSTIFICATION:

(A) Concisely describe what the project is.

This project will mitigate the asbestos in the building, with emphasis on the open plenum supply design ceiling system. The work will require asbestos mitigation and the replacement of flooring, ceilings, and other materials removed or impacted by asbestos abatement. This project will also provide for renovation of office and classroom spaces within Beckley Nursing.

(B) What is the existing program and how will it be improved?

Health and safety of building occupants and maintenance personnel. Even simple tasks of replacing ceiling tiles or replacing light bulbs can pose risks to staff.

(C) What will be the impact on your operating budget?

This project does not add square feet of functional space but will require agency to provide funding for temporaries moves to accommodate the mitigating and related construction work.

(D) What are the consequences if this project is not funded?

At this time, any maintenance work on lighting or ceiling panels required asbestos monitoring, which adds labor costs and delays in service response time. Additionally, some tasks are impossible to complete within the ceiling plenum. Finally, should there be some significant roof repairs; the building may need to be evacuated. If the required roof work takes place during the academic year, the disruptions to classes and labs would be intolerable.

ESTIMATED BUDGET:		FUNDING:	
Land		PBF	$1,700,000
A/E fees	$ 62,000	General Account	
Construction	$ 1,560,000	Agency Funds	
5% Contingency	$ 78,000	Federal Funds	
F F & E	$ 0	Other	
Other			
Total	$ 1,700,000	Total	$1,700,000

Agency Head Signature: ______________________________

Date: ______________________________

OFFICE OF THE STATE BOARD OF EDUCATION

SET A

PROJECT SUMMARY

Project Title: WWAMI Building Addition

Institution/Agency: University of Idaho

Brief Description: The University plans to construct a 6,000 sf, one-story building addition to the WWAMI Building, located on the eastern edge of the Moscow campus. This building addition will provide needed expansion space for this growing medical education program.

Project Scope:	**NASF**	**GSF**
Current Building size:	14,400	17,200
Proposed Building addition:	TBD	6,000
Site and utility infrastructure		
Furnishings, Fixtures, and Equipment		
All project fees and related expenses.		

Estimated Total Cost:
Source of Construction Funds (by fund source and amount):

Total Project Cost

Fund Source	Amount
Permanent Building Fund	$ 2,400,000
Federal Funds	$ 0
Bond Funds	$ 0
Gifted Funds	$ 0
Total:	$ 2,400,000

Previous Appropriations

Fund Source	Amount
All Sources	$ 0

Budget Year Request

Fund Source	Amount
Permanent Building Fund	$ 2,400,000

Date Approved by State Board of Education:

FY 2018 represents the first request for this facility.

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1. PROJECT DESCRIPTION AND JUSTIFICATION

Idaho's WWAMI Medical Education Program is a partnership with the University of Washington School of Medicine and the states of Washington, Wyoming, Alaska, Montana, and Idaho. Students who enter the program are dual enrolled at the University of Idaho and the University of Washington School of Medicine and complete their foundations phase of medical school at the Moscow campus.

The State has supported the growth of the program over the last few years, doubling the student count from twenty seats to forty seats. Further, the changing curriculum now requires a given cohort to spend 18 months on campus (previously 12 months), resulting in an overlap of student cohorts from one year to the next. Changing pedagogy and accreditation requirements result in the need for more collaborative, active learning spaces. Thus, program space needs are growing rapidly, with a need to accommodate 80 students at a time, compared to only 20 students previously.

The WWAMI program has operated out of the 3rd floor of the Student Health Center for many years, supported by anatomy lab space at nearby Washington State University, and a dedicated classroom elsewhere on the Moscow campus. The desire is to meet all these space needs, to include all necessary collaboration and student support spaces for the expanded and overlapping cohorts, in one place.

The University has identified another campus building, previously used as a business incubator, to serve as the new home for the WWAMI program. This one story building is on the edge of campus and near the city's medical complex, ideally supporting further collaboration and synergies with the local medical community. Planning is underway to convert this 25 year old building for WWAMI's use, with $6M in funding support from WWAMI program reserves and private donors.

A recent feasibility study finds this converted building will still fall short of fully meeting WWAMI's space needs. The University looks to construct an addition to the west side of the facility, providing additional space, primarily for expanded student clinical lab space with supporting small exam rooms. Additionally, the space will provide expanded student study, interaction, and support space, meeting accreditation requirements for the expanded cohorts.

2. PROJECT COMPONENTS

Prior to the anticipated expansion of the building, the existing building is to be renovated in 2017 and 2018 to provide an onsite anatomy and prosection labs and morgue, as well as two flexible, active learning classrooms. Other renovated spaces will include faculty offices, updated conference space, and limited student study and support space. Additional space will need to be created to fully support the needs of the growing WWAMI program.

As noted above, this will be achieved through construction of a 6,000 sf addition to the west side of the existing facility. This building addition will occur after the renovated building is occupied and in full use by the WWAMI program. Until that time, WWAMI will make continued use of their current limited space in the Student Health Center, splitting their operations across multiple campus buildings.

The expansion space will provide student clinical lab space and associated small exam rooms. Such spaces support interactive group instruction for the students in conducting medical examinations, patient interview skills, and in developing ‘bedside’ manners. Additional space will support both private and group student study spaces dictated under medical instruction accreditation requirements.

3. ALTERNATIVES

Three alternatives have been studied to date.

<u>Alternative 1: Include this Scope within the IRIC Facility Currently Under Construction</u>

This alternative would have entailed including portions of WWAMI’s space needs within the scope of the Integrated Research and Innovation Center (IRIC) currently under construction and scheduled to open in January 2017. This alternative would have placed these spaces in a systems-intensive, high-performance facility. These spaces do not need to be in such a high-performance facility and placing them there would be an inefficient use of resources. The alternative also represents a poor choice in terms of opportunity costs as these spaces would by necessity would reduce the number and size of the research laboratories and core laboratories that could be constructed within IRIC.

In addition, the IRIC facility is a $52M effort, the largest single design and construction effort ever accomplished by the University of Idaho on a total dollars basis. At the time IRIC was in design, the medical instruction pedagogy was in the midst of an overhaul, lending uncertainty to the ideal space requirements to be met. Rather than expand an already large project scope, and with program uncertainties, the university rejected this alternative.

<u>Alternative 2: Construct a Separate and Distinct Medical Education Building</u>

This alternative consists of an attempt to identify and construct the spaces as described herein in a single new building. The university explored partnering with the local hospital under varying shared capital and real estate arrangements, and were unable to identify a mutually viable means of proceeding with a brand new construction project. The university rejected this alternative.

<u>Alternative 3: Proceed with a Renovation of an Existing Campus Building</u>

This option would entail identifying an existing campus structure, and modifying it to meet the expanding WWAMI space needs. It was infeasible to simply convert the existing Student Health Center; this 1930’s building would require substantial renovation, along with displacement of academic units, and with no readily available alternate campus space to which they might move.

The previous business incubator building was identified as the best location for WWAMI. This building housed limited incubator operations in recent years, and also hosted the Center for Disabilities and Human Development (CDHD), a unit with an outward, community focus. The university purchased a small building in the community, relocated CDHD to this off campus site, and is in the process of making incremental improvements to the incubator (now WWAMI) building. The planned improvements in the short term will assist in meeting the emerging active learning pedagogy, and incorporate the anatomy/morgue function, obviating the use of spaces at

Washington State University. Furthermore, this building is physically near the city's growing medical complex, facilitating opportunities for synergies between student learning, instructional outreach, and the local medical community.

The current footprint of the building required some expansion to ideally meet the full array of WWAMI's space needs. Renovation and expansion of this structure best meets the breadth of needs for WWAMI and the displaced unit. This is the university's preferred alternative.

4. VACATED SPACE

In the short term, there is no vacated space to be gained on the Moscow campus. WWAMI must still operate from within their historic spaces in the Student Health Center, even after the current incubator building is renovated and fully occupied by WWAMI. At that time, WWAMI can vacate the anatomy lab currently provided by Washington State University.

Once the proposed building addition is completed, WWAMI will be able to vacate the third floor of the Student Health Center. This will free approximately 5,000 sf of space. The Department of Psychology and Communications Studies is also located in the Student Health Center, and has a variety of faculty and labs scattered at various other locations about campus. WWAMI's departure from the building will allow Psychology to consolidate their far flung faculty and labs into one building, ultimately freeing small pockets of space in multiple campus buildings. The ultimate disposition of these spaces is yet to be determined, but will likely serve the needs of other users located in adjacent spaces.

OFFICE OF THE STATE BOARD OF EDUCATION

SET A

PROJECT SUMMARY

Project Title: University of Idaho Library Special Collections & Archive Facility

Institution/Agency: University of Idaho

Brief Description:
The University desires to construct improvements dedicated to supporting the mission of the University of Idaho Special Collections and Archive unit of the University of Idaho Library. The Special Collections and Archive is currently located within the University of Idaho Library; itself located in the core of the on the Moscow campus of the University of Idaho. The existing facility is inadequate for the functions is serves, and is in need of renovations and improvements to provide a facility befitting the character and the nature of the collections housed therein.

Improvements to the third floor of the Library to house an improved Special Collections and Archive Facility were envisioned and described in a 2009 Library Master Plan. It is the intent of this project to start by testing the assumptions made in the 2009 Library Master Plan process and recommend the best course of action. Upon acceptance of a set of recommendations, the intent is to then plan, design and implement a project that best serves the programmatic needs and requirements of the Special Collections and Archive.

Project Scope:	**NASF**	**GSF**
Current Building Size, UI Library:	TBD	190,200
Proposed Area of Renovation & Improvements:	TBD	14,900
Furnishings, Fixtures, and Equipment		
All project fees and related expenses		

.
Estimated Total Cost:
Source of Construction Funds (by fund source and amount):

Total Project Cost

Fund Source		Amount
Permanent Building Fund		$ 5,640,000
Federal Funds		$ 0
Bond Funds		$ 0
Gifted Funds		$ 0
	Total:	$ 5,640,000

<u>Previous Appropriations</u>

<u>Fund Source</u>	<u>Amount</u>
All Sources	$ 0

<u>Budget Year Request</u>

<u>Fund Source</u>	<u>Amount</u>
Permanent Building Fund	$ 5,640,000

Date Approved by State Board of Education:
FY 2018 represents the first request for this facility.

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1. PROJECT DESCRIPTION AND JUSTIFICATION

Background and Planning Context:
The University of Idaho Library is the largest Library resource in the State of Idaho. It provides Library, Collection, Archival, Research, Group Learning, Tutoring, and Technology services not only to the students, faculty and staff of the University of Idaho, but also to stakeholders and researchers from across the State of Idaho. As the largest Library within the State of Idaho, the significance and import of the collections the University of Idaho Library houses cannot be over-estimated.

The current University of Idaho Library structure was originally constructed and occupied in 1957. A significant whole-building renovation and addition was completed in 1992/93. With the addition, the University of Idaho Library measures 190,200 gsf. Inclusive of the basement, the University of Idaho Library is a five story structure and it is centrally located in the academic and research core of the main campus of the University of Idaho in Moscow, Idaho.

While advances in technology are reshaping today's libraries, campus libraries remain the interdisciplinary hub for students and scholars. Campus libraries such as the University of Idaho Library become a community center extending learning beyond the classroom. Library buildings are iconic as symbols of the centuries of knowledge upon which today's research builds. Surveys indicate that the library is one of four buildings on any given campus that most influence a prospective student's decision to enroll at that university.

Yet it is also a given that libraries are in transition. Collections are no longer limited to physical materials held within a library's walls; they are also digital. The role and mission of libraries in general is moving towards empowering access. That said, physical collections are still important, and it is incumbent upon libraries to service the curation of, and access to, both digital and physical collections.

In view of this, The University of Idaho invested in a robust evaluation and analysis of our campus Library in 2009. The outcome of this process is the development of a 2009 Master Plan for the University of Idaho Library entitled: "<u>Preserving the Past, Inspiring the Future.</u>" The planning process was carried out over the course of the year and included all stakeholder through the use of several public planning workshops. The stakeholders identified planning goals essential to the vision of the University of Idaho Library as a significant, purposeful, and highly collaborative campus resource. They are:

- **Protect** and highlight the archival collections;
- **Encourage** new and different methods of learning;
- **Connect** students to the library resource(s);
- **Serve** as a vibrant, active and alive center of campus.

The resultant recommendations are contained in the 2009 Master Plan and are captured as an iterative series of phased improvement projects. The projects envisioned in the Master Plan provide the desired facilities necessary to promote and support:

- Scholarship and Creative Activity;
- Outreach and Engagement;
- The creation of a Collaborative Organization, Culture, and Climate.

Work Completed to Date:
Since completion of the 2009 "Preserving the Past, Inspiring the Future" Master Plan for the University of Idaho Library, the university has invested significantly in the implementation of the plan. As a starting point the plan calls for the purchase and installation of high-density, compact shelving on the Second Floor of the Library in order to free general floor space for the various proposed improvements. The first phase of this installation of high-density, compact shelving is complete.

Most recently, the University funded and competed the design and construction of portions of the planned improvements for the First Floor of the Library. These improvements include, but are not limited to, the initial phase of the envisioned "Information Commons," Team Rooms for group study, work, and collaboration, the Map Room, reconfiguration of the Circulation Desk, a Multi-media Zone, and a Coffee Bar.

The investment by the university in these initial improvements to date exceeds $2,470,000.

Project Request:
The next phase of work anticipated by the 2009 Master Plan supports the University's Special Collection and Archives program. The University of Idaho Special Collections and Archive is charged with the care and curation of a number of collections that are specific to the university and to the State of Idaho. The collections are of a high degree of import and it is essential that they are housed in a facility worthy of their character and nature.

The 2009 Library Master Plan makes the assumption that the Special Collections and Archive should be housed on the third floor of the University Library. However, enough time has since passed that the university wishes to test this assumption and consider possible alternative scenarios at the outset of this capital project implementation.

2. PROJECT COMPONENTS

Regardless of the final, selected location for the Special Collections and Archive, the necessary and requisite spaces and features required to provide the Special Collections and Archive with a prominent, State-of the Art facility include:

- Comfortable, inviting reading rooms that can be supervised by Special Collections and Archive staff;
- Adequate and suitable storage space for the collections materials;
- Display walls and cases that allow collections materials to properly and securely displayed through and under glass;
- Support spaces for the Special Collections and Archive personnel that facilitate the proper administration of the collections materials. The spaces include, but, may not be limited to;
    - reception area;
    - offices as needed;
    - holding area;
    - supplies and storage area;
    - records processing;
    - digital laboratory;
    - and support functions and areas as needed;
- Stable, controlled environmental conditions designed to preserve the collections and archive materials and prolong their anticipated life span.
    - UV protection and control
    - Tight, narrow range temperature control - 66 to 68 degrees F.
    - Tight, humidity control – 45% relative humidity
    - Secure, controlled access
    - Occupancy Sensors

3. ALTERNATIVES

As mentioned above, the 2009 "Preserving the Past, Inspiring the Future" Master Plan for the University of Idaho Library recommended including the Special Collections and Archive Facility within the current University of Idaho Library, specifically on the third floor. However, the university desires to revisit this recommendation as part of the early planning and programming phase of the project. Possible alternatives regarding the best location are, but are not necessarily limited to:

Alternative 1: Include the Special Collections and Archive scope within the University of Idaho Library, 3rd Floor per the 20089 Master Plan.

Alternative 2: Include the Special Collections and Archive scope within the University of Idaho Library, but, on another floor.

Alternative 3: Construct Separate and distinct Special Collections and Archive Building

Alternative 4: Renovate a portion of another campus location to serve as the Special Collections and Archive Facility.

4. VACATED SPACE

Assuming Alternatives 1 or 2 are selected, The Special Collections and Archive project does not result in any vacated space. Rather, it makes improved and more efficient use of existing space with the University of Idaho Library by reallocating space on the third floor for the Special Collections and Archive Suite and repurposing space in the basement to serve the receiving and cataloging functions. The existing elevator shaft that was constructed in 1992/93 but never outfitted will be put in service. Finally the efficiency of space utilization will be vastly improved through the installation of efficient, high-density, compact shelving within the Special Collections and Archive Suite.

Should Alternatives 3 or 4 are selected, the vacated space in the basement of the existing Library will be repurposed for Library functions yet to be identified.

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OFFICE OF THE STATE BOARD OF EDUCATION

SET A

PROJECT SUMMARY

Project Title: Research and Classroom Facility

Institution/Agency: University of Idaho

Brief Description:
The University of Idaho is currently in the process of the construction of the Integrated Research and Innovation Center (IRIC), a new research intensive facility comprised of sophisticated research laboratories to be located in the core of campus at the next of the College of Engineering, College of Science, College of Natural Resources and the College of Agricultural and Life Sciences. IRIC is to be completed in the fall/winter of 2016, and operational in January of 2017. IRIC will be an exciting addition to the campus and to the university and carries with it the potential of driving the university's research profile to new heights.

The character and nature of the IRIC facility is focused on high-performance, research intensive laboratories, collaborative spaces, and core laboratories to be available to all research units and researchers campus wide. Precisely because IRIC is to be such a high-performance facility, it does not contain much in the way of office space and there will be no classroom space. Including such spaces in such a systems and utilities intensive facility would not be an efficient use of resources.

Accordingly then, there is a need to provide spaces such as offices for additional research units and departments, space for grant driven activities, spaces for computational research activities, classrooms, seminar spaces, etc., in a location convenient to IRIC. These spaces will support learning, computational research, dissemination and transfer of knowledge and information, and other related support activities that may be related to, or a result of, the research activities housed within the IRIC facility. The Research and Classroom Facility will be comprised of such spaces and is to be located to the immediate southeast of IRIC on the east side of the Line Street Pedestrian Mall on the main campus of the University of Idaho.

Project Scope:	**NASF**	**GSF**
Building size:	TBD	40,000
Site and utility infrastructure		
Furnishings, Fixtures and Equipment		
All project fees and related expenses, to include the demolition of the existing structure(s) on site.		

Estimated Total Cost:
Source of Construction Funds (by fund source and amount):

Total Project Cost

Fund Source		Amount
Permanent Building Fund		$ 8,000,000
Federal Funds		$ 1,000,000
Bond Funds		$12,000,000
Gifted Funds		$ 3,000,000
	Total:	$24,000,000

Previous Appropriations

Fund Source	Amount
All Sources	$ 0

Budget Year Request

Fund Source	Amount
Permanent Building Fund	$ 4,000,000

Date Approved by State Board of Education:
FY 2018 represents the third request for this facility.

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1. PROJECT DESCRIPTION AND JUSTIFICATION

The University of Idaho has a need to design and construct a Research and Classroom Facility supporting computational research and providing space to deliver academic programming on an existing site to the immediate southeast of the Integrated Research and Innovation Center (IRIC) on the main campus of the University of Idaho in Moscow, Idaho. This site is located in the core of the research neighborhood of the campus, adjacent not only to the new IRIC facility, but also to the College of Engineering, College of Science, and College of Natural Resources. The College of Agricultural and Life Sciences will be one building to the west, separated by IRIC itself.

The general intent of the Research and Classroom Facility is to provide space for learning, computational research, dissemination and transfer of knowledge and information, and other related support activities that may be related to, or a result of, the research activities housed within the IRIC facility. Because the IRIC is a high-performance, systems-intensive research facility with a resultant high initial cost on a unit basis, it is a much wiser use of resources and a more efficient investment to provide spaces for learning, computational research, dissemination and transfer of knowledge and information, and other related support activities in an adjacent, less systems-intensive facility.

The Research and Classroom Facility is envisioned to house offices, and office suites, computational research space, classrooms and other support spaces in an approximately 40,000 square foot facility located at the intersection of the 7th Street and Line Street pedestrian malls on the Moscow campus. This location will allow the Research and Classroom Facility to not only support the activities and research generated within IRIC, but will also allow it to support other activities and research with the Colleges of Engineering, Science, Natural Resources, and Agricultural and Life Sciences. Further it will support activities and Research from the Office of Research and the various institutes, as well as providing additional classroom stock available for general education classroom use.

2. PROJECT COMPONENTS

The preferred site for this Research and Classroom Facility is on the east side of the Line Street Pedestrian Mall, a major north/south pedestrian circulation spine on campus, just down the hill from the Idaho Commons. A portion of the site is currently vacant, as the old 5kW electrical substation was on the site prior to its demolition a few years ago. The remainder of the site currently old the existing NAMEC facility. NAMEC is a wood framed, surplus WWII era building long slated for demolition and removal in the university's Long Range Campus Development Plan (LRCDP). NAMEC is currently occupied by the Native American Education Center and by the College Assistance Migrant Program (CAMP). Both of these functions will require relocation to a site as yet to be determined. The site is further bounded by the College of Science Building to the east, the Food Research Center to the south and the 7th Street Pedestrian Mall and the college of Engineering to the north. The site is sloped south to north and offers the opportunity for views to the north.

As mentioned, the Research and Classroom Facility is envisioned to be 40,000 square feet, minimum. It is envisioned of phase 1 of a 2 phase effort. A second phase of an additional 40,000 square feet to the south is envisioned at a yet to be determined point in the future.

Spaces within the Research and Classroom Facility will include, but may not necessarily be limited to:

- faculty offices and office suites that allow for small scale departments and research institutes to be house together in a collaborative fashion;
- computational research spaces;
- collaborative, technology rich classroom, constructed along the model of spaces prototyped in Renfrew Hall and the Teaching and Learning Center by the University of Idaho in 2013;
- research collaboration spaces and seminar rooms;
- Graduate and Research Assistant spaces;
- and other specialty research and research support spaces as determined to be required.

The Research and Classroom Facility will be designed and constructed in such a manner to support the potential future expansion of the building to accommodate additional academic programs and needs. Such additional program space would possibly include a tiered classroom, various breakout rooms, as well as reception and kitchen/dining services. The date of any such future expansion is yet to be determined and would be subject to further review and approval of the Board of Regents.

3. ALTERNATIVES

Three alternatives have been studied to date.

Alternative 1: Include This Scope within the IRIC Facility Currently Under Design and Construction

This alternative would have entailed including many, more office, office suites, classrooms, seminar rooms, etc. within the scope of the Integrated Research and Innovation Center (IRIC) currently under design and construction and schedule to open in 2016. This alternative would have placed these spaces in a systems-intensive, high-performance facility. These spaces do not need to be in such a high-performance facility and placing them there would be an inefficient use of resources. The alternative also represents a poor choice in terms of opportunity costs as these spaces would by necessity would reduce the number and size of the research laboratories and core laboratories that could be constructed within IRIC. 40,000 sf of office, office suites, classrooms, seminar rooms, etc., as described herein, and added to the IRIC scope as currently in design, would create structure too large for the IRIC site.

In addition, the IRIC facility is a $52 mil effort, the largest single design and construction effort ever accomplished by the University of Idaho on a total dollars basis. Adding an additional scope of $24 mil would have created an untenable and infeasible project. The university rejected this alternative.

Alternative 2: Construct Separate, Dispersed Research and Classroom Spaces in existing Buildings

This alternative consists of an attempt to identify and construct the spaces as described herein in separate, exiting facilities dispersed across campus. The university simply does not have an existing stock of unused or underused space(s) to support this alternative. Space is at a premium on campus and existing programs are often forced into inadequate space. New programs are often denied space requested for their needs. Space is an extremely limited, and limiting, resource in the current campus environment. In addition, this approach does not readily support interdisciplinary interaction and collaboration The university rejected this alternative.

Alternative 3: Construct a Research and Classroom Facility

This option would entail constructing a single facility adjacent to the site of the IRIC facility and within immediate adjacencies of the structures that comprise the research neighborhood in the core of the Moscow Campus. Overall project expenses are expected to be less under this approach since there will be only one site and construction of a single building allows elimination of unnecessary duplication of building systems. Placing these spaces in a less systems-intensive structure will also reduce costs. Combining these spaces in a single structure will also increase collaboration amongst research and research support units. This is the university's preferred alternative.

4. VACATED SPACE

In the main, the Research and Classroom Facility is envisioned as new space to satisfy both existing, pent-up needs that are currently insufficiently housed into inadequate conditions on a "make-do" basis, and to satisfy projected research needs and support needs generated by the IRIC facility to be opened in 2016. Accordingly, there is little to no vacant space generated by this request. Space currently used for instructional laboratories and some research laboratories that may be vacated may be reused to meet additional laboratory space demand. Other prospective uses of vacated space may be for offices and specialized learning areas including computer laboratories, seminar areas, team and group rooms, etc.

As mentioned hereinbefore, however, the design and construction of the Research and Classroom Facility on the selected site will require the demolition and removal of the existing, wood-framed NAMEC building. NAMEC is in poor repair and it is a structure that is of an inefficient size which vastly under-utilizes the site. The NAMEC building is listed as a structure to be removed under the university's adopted Long Range Campus Development Plan (LRCDP). NAMEC is currently occupied by two units and those units will need to be deployed elsewhere on campus as a part of the development of the Research and Classroom Facility. One possible option to be considered is placing these units within the new Research and Classroom Facility, however, the final location for these units is yet to be determined.

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CAPITAL BUDGET REQUEST
FY 2018
CAPITAL IMPROVEMENT PROJECT DESCRIPTION
(New Buildings, Additions or Major Renovations)

AGENCY: **Lewis-Clark State College**	AGENCY PROJECT PRIORITY: 1

PROJECT DESCRIPTION/LOCATION: Living and Learning Complex

CONTACT PERSON: Todd Kilburn	TELEPHONE: 792-2240

PROJECT JUSTIFICATION:

(A) Concisely describe what the project is. Request is for a new, combined-use residential and classroom facility. The entire facility would be approximately 60,000 sq. ft. of which the College-funded dormitory related, dining and fitness space would approximately 52,800 sq. ft. and the classroom, student counseling center, student health and other instructional areas approximately 7,200 sq. ft. Agency funding would cover all dormitory-related areas of the facility. The classroom, student service and instructional sections would be covered by PBF dollars ($2.0 which amounts to about 12% of the total project). The new facility (estimated 150 bed spaces, student counseling, health services and instructional (2 classroom and student study and collaboration areas) would enable LCSC to: 1) keep pace with steadily growing residential student enrollment (there is already a waiting list for students desiring to live in campus housing), 2) retire and/or re-purpose dilapidated, sub-standard dorm units, and 3) provide additional multi-purpose classroom space to support instructional programs.

(B) **What is the existing program and how will it be improved? LCSC's** residential student population has grown significantly over the past ten years. Students are currently housed in four College-owned residence halls, including Talkington Hall (built in 1930), Clark Hall (1951), Parrish House (1956), and our only modern dormitory, Clearwater Hall (2006). Current housing will accommodate only 311 students. We have a significant waiting list at the current time and have completely filled all units, including our off-campus, College-owned units. We have doubled up students where possible in rooms designed for single occupancy. Students from out of the local area who desire to enroll in LCSC programs may choose not to attend the College if suitable, safe dormitories are not available. Bringing the new living and learning facility on board will provide safe, efficient, no-frills housing for our students, expand our classroom capacity, and enable us to re-purpose older units for offices and other suitable uses.

(C) **What will be the impact on your operating budget?** Costs of operating the dormitory portion of the facility will be covered by rent collected from student residents. Oversight of student residents will be provided by Residence Advisors (RAs) who are compensated by receiving free rooms. Custodial and upkeep costs for the classroom section of the facility would be offset with occupancy costs and institutional revenues.

(D) **What are the consequences if this project is not funded?** Without a newer facility of the type requested, access for current and future out-of-area students who seek degrees/certificates at LCSC would be limited. For first year and continuing students, the positive living and learning environment which is possible in a residential facility with integrated classrooms helps recruit and retain students and increases students' opportunities for engagement and motivation. If PBF dollars were not available to support the classroom portion of the project, the College would need to press ahead using agency funds to meet student housing needs.

PLEASE INCLUDE ANY ANTICIPATED ASBESTOS COSTS IN THE OVERALL BUDGET.

ESTIMATED BUDGET:		FUNDING:	
Land	$0	PBF	$2,000,000
A/E fees	$ 500,000	General Account	$0
Construction	$ 14,650,000	Agency Funds	$15,000,000
5% Contingency	$850,000	Federal Funds	$0
F F & E	$ 1,000,000	Other	$0
Other	$0		
Total	$ 17,000,000	Total	$17,000,000

Agency Head Signature: ______________________________

Date: ______________________________

BUDGET REQUEST
FY 2018
CAPITAL IMPROVEMENT PROJECT DESCRIPTION
(New Buildings, Additions or Major Renovations)

AGENCY: College of Southern Idaho AGENCY PROJECT PRIORITY:

PROJECT DESCRIPTION/LOCATION: Canyon Building Remodel and Modernization

CONTACT PERSON: Jeff Harmon TELEPHONE: 208-732-6210

PROJECT JUSTIFICATION:

(A) This project consists of remodeling and modernizing approximately 25,000 square feet of existing classrooms and offices which were originally constructed in 1976.

(B) This space houses our Information Technology Education Program. Remodeling will make more efficient use of the existing area and create an instructional environment more in line with modern instructional standards and practices.

(C) There will be no anticipated impact on our operating budget.

(D) Failing to fund this project will hinder our ability to create the most effective learning environment for the maximum number of students.

PLEASE INCLUDE ANY ANTICIPATED ASBESTOS COSTS IN THE OVERALL BUDGET.

ESTIMATED BUDGET:		FUNDING:	
Land	$	PBF	$ 825,000
A/E fees	82,500	General Account	
Construction	701,250	Agency Funds	
5% Contingency	41,250	Federal Funds	
F F & E		Other	
Other			
Total	$ 825,000	Total	$ 825,000

Agency Head Signature: ______________________________

Date: ______________________________

Capitol Budget Request
Set A - Request - 2018
Capital Improvement

Agency:	College of Western Idaho	Agency Project Priority: 1

Project Description/Location:	Boise Campus Building & Site Development	Boise Campus

Contact Person	Craig Brown	562-3279 ph.

Project Justification

(A) Concisely describe the Project

This project will assist the College of Western Idaho with design work for a building and site improvements at the Boise Campus located at Main and Whitewater Blvd. It is anticipated that the College will have completed preliminary design and programming necessary to support this project. Any additional funds required for design services will be provided by the agency.

(B) What is the existing program and how will it be improved?

Existing programs and facilities are located within leased space located at the Black eagle business park on Overland Rd. and Maple Grove Rd. New College owned facilities will be required for accreditation to support long term feasibility and to better serve the community as a whole. It is anticipated at this time that a first phase building will occur on-site to support approximately 200,000s.f.

(C) What will be the impact on your operating budget?

Additional operating costs will be incurred related to utilities and maintenance. Some costs will be offset through relocation of some services and programs. Revenue will also be generated to support operations of the facility through retail and convention services.

(D) What are the consequences if this project is not funded?

Student fee increases may have to occur and it is likely the timing of the project would be delayed. The project scope would be impacted including the reduction of some services.

Estimated Budget:			**Funding:**		
Land			PBF	$	750,000
A / E Fees	$	6,000,000	General Account		
Construction	$	45,000,000	Agency Funds		
5% Contingency	$	4,500,000	Federal Funds		
FF&E	$	4,500,000	Other	$	59,250,000
Other					
Total	$	60,000,000	**Total**	$	60,000,000

Agency Head Signature: ______________________

Date: ______________________

CAPITAL BUDGET REQUEST
FY 2018

Capital Improvement Project Description
(New Buildings, Additions or Major Renovations)

AGENCY: **North Idaho College** AGENCY PROJECT PRIORITY: **1**

PROJECT DESCRIPTION/LOCATION: **Hedlund Black Box Theater Remodel**

CONTACT PERSON: Chris Martin TELEPHONE: 208-769-3340

PROJECT JUSTIFICATION:

(A) This project is a remodel of the diesel labs being vacated in the Hedlund Building. These labs and main restrooms will be converted into a black box theatre for enhanced lab and performance space for the performing arts.

(B) Currently the only performance space on campus is the Schuler Performing Arts Center with a 1,200 seat auditorium. The addition of a smaller, fully flexible black box space will enhance the music and theatre arts programs allowing smaller performances, flexible format space and also free up Schuler Performing Arts Center for larger performances.

(B) This project has no anticipated impact on operating budget.

(D) Without the establishment of the black box theatre the existing diesel lab spaces will be dormant and not fully utilized for student learning or college operations. The existing space is set-up for program specific labs for career and technical education programs.

ESTIMATED BUDGET:		FUNDING:	
Land	**0**	PBF	**$850,000**
A/E fees	**66,130**	General Account	
Construction	**661,300**	Agency Funds	
5% Contingency	**36,480**	Federal Funds	
F F & E	**86,090**	Other	
Other			
Total	$**850,000**	Total	**$850,000**

Agency Head Signature: ______________________________

Date: 6/3/16

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BOISE STATE UNIVERSITY, IDAHO STATE UNIVERSITY, and UNIVERSITY OF IDAHO

SUBJECT

Report on National Collegiate Athletic Association (NCAA) Academic Progress Rate (APR) Scores

REFERENCE

August 2015	Board received NCAA APR Report

BACKGROUND/DISCUSSION

NCAA instituted the APR tracking system in 2004 in response to public concerns over academic performance and graduation rates among student athletes. The system has evolved over time, and the process is now adjusting to changes implemented in 2011 at the behest of NCAA college presidents. The APR is determined by using eligibility and retention data for each student-athlete on scholarship during an academic year. Student-athletes are awarded points for each semester they are enrolled and for each semester they are eligible for intercollegiate competition. The single and multi-year APR is determined as a percentage of points earned divided by total points possible for that cohort, with the resulting number multiplied by 1,000. Theoretically, if every scholarship athlete on a team's roster maintains academically eligibility and stays in school, each of them would earn two points—the total of those points would be divided by the total possible points, and the team would receive a "perfect" 1,000 APR score. The NCAA calculates the APR rate as a four-year rolling average. Currently, the benchmark minimum score for each sport is 930. Teams that fall below the 930 minimum are subject to sanctions which may include loss of scholarships. APR averages which fall below 900 over time may also include restrictions on practice time, loss of post-season competition eligibility, and other penalties.

IMPACT

APR reports from the three NCAA member institutions are provided. All three institutions report that they are meeting the 930 APR benchmark and/or are making progress toward that goal. The current four-year rolling averages for all teams are above the 900 APR threshold which could trigger significant sanctions, if not met.

ATTACHMENTS

Institution narrative and NCAA 2014 – 2015 Academic Progress Rates

STAFF COMMENTS AND RECOMMENDATIONS

Overall, each of the three NCAA member institutions is making marked progress in APR scores. After any adjustments granted by the NCAA, all teams at all three of the universities have met the four-year 930 APR benchmark, with the exception of Football and Men's Cross Country at the University of Idaho (however, both teams were provided exceptions from the NCAA which relieved imposition of post-season competition sanctions). The APR system is a useful element in institutions' toolkits to track and encourage academic success for student athletes. When coupled with additional measures, such as Grade Point Averages and graduation/degree completion results, the APR can provide performance metrics to support data-informed decisions and effective engagement by athletic departments and institutions executives in support of the Board's academic goals.

BOARD ACTION

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

Boise State University
Spring 2016 NCAA Academic Progress Rate (APR) Report Summary

Boise State Athletics earned its highest single-year NCAA Academic Progress Rate for the 2014-15 reporting year, combining for a department record of 991. The department's multi-year APR of 981 was also a record.

In all, 13 of the Broncos' programs recorded perfect single-year scores of 1,000 for 2014-15 – men's cross country, women's cross country, men's golf, women's golf, gymnastics, soccer, swimming & diving, women's tennis, men's indoor track & field, men's outdoor track & field, women's indoor track & field, women's outdoor track & field and volleyball.

Additionally, nine programs recorded record multi-year APR scores, including women's cross country (996), men's golf (980), women's golf (1,000), soccer (1,000), softball (991), swimming & diving (998), women's tennis (1,000), women's indoor track & field (982) and wrestling (980).

The Boise State football team ranked second in the Mountain West with a multi-year score of 982, up one point from 2013-14 and ranking tied for 15th nationally amongst schools in the Football Bowl Subdivision.

Boise State's women's golf, swimming & diving and women's tennis teams led the Mountain West in multi-year APR, while the volleyball team ranked second in the league (995) and the women's cross country (996), softball (991) and men's tennis (992) teams each ranked third.

At 961, the men's basketball team's multi-year score is up 10 points from last year's release, and 20 points from two years ago.

The Broncos' women's golf and women's tennis teams each earned Public Recognition Awards for having multi-year APR scores in the top-10 percent of their respective sports nationally.

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2014 - 2015 NCAA Division I Academic Progress Rate Public Report

Institution: Boise State University

Date of Report: 04/18/2016

This report is based on NCAA Division I Academic Progress Rate (APR) data submitted by the institution for the 2011-12, 2012-13, 2013-14 and 2014-15 academic years.

*[Note: All information contained in this report is for four academic years. Some squads may still have small sample sizes within certain sport groups. In accordance with the Family Educational Rights and Privacy Act's (FERPA's) interpretation of federal privacy regulations, data cells containing three or fewer student-athletes have been suppressed and are indicated by an * symbol. The information in this report does not reflect any changes to data made after this date.]*

The following chart represents by-sport APR averages for noted subgroups. National aggregates are based on all squads that have certified their academic data as final.

Sport (N)	Multiyear APR	2014-2015 APR	Percentile Rank within Sport	Percentile Rank within All Sports	All Divison I	Public Institutions	Private Institutions	Football Bowl Subdivision	Football Championship Subdivision	Division I (Non-Football)
By Sport - Men's										
Baseball (300)	NA	NA	NA	NA	970	966	978	974	968	969
Basketball (350)	961	941	40th-50th	10th-20th	964	960	970	967	960	965
Cross Country (315)	950	1000	10th-20th	1st-10th	977	972	987	982	972	978
Football (251)	982	991	80th-90th	40th-50th	959	956	968	964	954	947

2014 - 2015 NCAA Division I Academic Progress Rate Public Report

Institution: Boise State University

Date of Report: 04/18/2016

Sport (N)	Multiyear APR	2014-2015 APR	Percentile Rank within Sport	Percentile Rank within All Sports	All Divison I	Public Institutions	Private Institutions	Football Bowl Subdivision	Football Championship Subdivision	Division I (Non-Football)
Fencing (18)	NA	NA	NA	NA	984	970	989	969	997	984
Golf (301)	980	1000	30th-40th	40th-50th	983	980	988	986	980	982
Gymnastics (15)	NA	NA	NA	NA	986	986	995	989	1000	942
Ice Hockey (59)	NA	NA	NA	NA	987	984	989	988	993	983
Lacrosse (69)	NA	NA	NA	NA	977	973	979	985	977	975
Skiing (11)	NA	NA	NA	NA	983	980	988	982	987	978
Soccer (205)	NA	NA	NA	NA	974	970	977	973	976	973
Swimming (134)	NA	NA	NA	NA	980	976	985	980	983	978
Tennis (261)	992	964	60th-70th	70th-80th	979	978	982	982	978	979
Track (281)	948	1000	10th-20th	1st-10th	969	965	979	974	963	973
Volleyball (22)	NA	NA	NA	NA	985	982	988	983	985	985
Water Polo (22)	NA	NA	NA	NA	984	981	985	988	991	976
Wrestling (77)	980	974	70th-80th	40th-50th	970	969	970	973	970	971
By Sport - Women's										
Basketball (348)	970	983	20th-30th	20th-30th	978	975	984	978	978	978
Bowling (31)	NA	NA	NA	NA	971	966	978	989	963	985

2014 - 2015 NCAA Division I Academic Progress Rate Public Report

Institution: Boise State University

Date of Report: 04/18/2016

Sport (N)	Multiyear APR	2014-2015 APR	Percentile Rank within Sport	Percentile Rank within All Sports	All Divison I	Public Institutions	Private Institutions	Football Bowl Subdivision	Football Championship Subdivision	Division I (Non-Football)
Cross Country (347)	996	1000	70th-80th	80th-90th	986	983	990	989	982	987
Fencing (23)	NA	NA	NA	NA	984	961	994	985	996	961
Field Hockey (78)	NA	NA	NA	NA	988	985	990	986	990	985
Golf (262)	1000	1000	90th-100th	90th-100th	989	987	993	992	987	987
Gymnastics (61)	975	1000	10th-20th	30th-40th	992	992	993	991	996	995
Ice Hockey (35)	NA	NA	NA	NA	992	990	993	994	994	988
Lacrosse (107)	NA	NA	NA	NA	989	987	990	994	987	988
Rowing (87)	NA	NA	NA	NA	988	987	989	987	988	991
Skiing (12)	NA	NA	NA	NA	991	989	993	988	993	991
Soccer (331)	998	1000	80th-90th	80th-90th	984	982	989	986	983	983
Softball (294)	991	978	60th-70th	60th-70th	981	978	989	985	977	983
Swimming (196)	998	1000	80th-90th	80th-90th	990	988	992	990	992	988
Tennis (322)	1000	1000	90th-100th	90th-100th	985	983	990	988	982	985
Track (333)	978	1000	30th-40th	40th-50th	981	977	988	983	977	984
Volleyball (333)	995	1000	70th-80th	70th-80th	984	982	991	987	982	985

2014 - 2015 NCAA Division I Academic Progress Rate Public Report

Institution: Boise State University

Date of Report: 04/18/2016

Sport (N)	Multiyear APR	2014-2015 APR	Percentile Rank within Sport	Percentile Rank within All Sports	All Divison I	Public Institutions	Private Institutions	Football Bowl Subdivision	Football Championship Subdivision	Division I (Non-Football)
Water Polo (32)	NA	NA	NA	NA	987	983	992	987	990	986
By Sport - Co-Ed										
Rifle (23)	NA	NA	NA	NA	981	980	1000	981	982	NA

*Denotes data representing three or fewer student-athletes. In accordance with FERPA's interpretation of federal privacy regulations, institutions should not disclose statistical data contained in this report in cells made up of three or fewer students without student consent.
N/A = No APR or not applicable
N = Number of teams represented
[1]Denotes APR that does not subject the team to ineligibility for postseason competition based on institutional, athletics and student resources and the team's Graduation Success Rate.
[2]Denotes APR that does not subject the team to ineligibility for postseason competition due to the team's demonstrated academic improvement.
[3]Denotes APR that does not subject the team to ineligibility for postseason competition due to the squad-size adjustment. The "upper confidence boundary" of a team's APR must be below 930 for that team to be subject to ineligibility for postseason competition. Squad-size adjustment does not apply to teams with four years of APR data and a multiyear cohort of 30 or more student-athletes.'
[4] Denotes APR that does not subject the team to penalties due to the team's demonstrated academic improvement.
[5]Dentoes APR that does not subject the team to penalties due to the squad-size adjustment. The "upper confidence boundary" of a team's APR must be below 930 for that team to be subject to penalties. The squad-size adjustment does not apply to teams with four years of APR data and a multiyear cohort of 30 more student-athletes.
[6]Denotes APR based on a one year cohort, not subject to ineligibility for postseason competition and/or any penalties
[7]Denotes APR based on a two year cohort, not subject to ineligibility for postseason competition and/or any penalties
[8]Denotes that team is not subject to ineligibility for postseason competition and/or penalties based on institutional reserves
[9]Denotes that team's APR is under review
[10]Denotes APR that does not subject the team to penalties based on the low resource APR limit of 910.

Idaho State University
Spring 2016 NCAA Academic Progress Rate (APR) Report Summary

The 2014-15 one-year score for the whole department was 972. This is the 4th highest single year score for ISU's overall APR (2011-12: 983, 2013-14: 983, 2012-13: 973). The one-year Eligibility score was the 4th highest ever for the department with a score of 966 and the one-year Retention score was the 2nd highest ever for the department with a score of 973.

- 5 of ISU's 15 teams scored a perfect 1000 (Down from 7 last year)
  - Women's Golf had their sixth perfect 1000 single-year score in the last 6 years and their 7th in the last 8 years. The four-year average for Women's Golf remains at a perfect 1000.
  - Men's Cross Country had their second perfect 1000 in a row and their 6th single year 1000 in the twelve-year history of the APR. Their four-year score is at a 990. However, with the upper confidence boundary statistical adjustment for having less than 30 members in the cohort for the four-year average, they have a four-year score of a 998.
  - Men's Tennis had their second perfect 1000 in a row for their one-year score to move their four-year score to a 966. The four-year score of 967 is the highest four-year score ever for Men's Tennis. In addition, the four-year retention score (947) and the four-year eligibility score (984) are the highest ever for Men's Tennis
  - Women's Cross Country had a perfect 1000 for the 5th time ever and the second time in 3 years.
  - Volleyball achieved a perfect 1000 for the 6th time in the twelve-year history of the APR. The four-year score for volleyball is at a 990 which ties their record for the highest four-year score for them (2012-13, 2013-14).

The 2014-15 four-year average for the whole department was the highest ever at 980 up from last year's record of 973. The four-year Eligibility score was the highest ever for the department with a score of 976 and the four-year Retention score was also the highest ever for the department with a score of 973

- Football had a one-year score of 972 (the 3rd highest ever for Football). The four-year score for football is now a 977 which is a four-year record for them. The previous record was 962 for the 2010-14 four-year period. This marks the 4th year in a row that the Football team has improved on its four-year score (881, 914, 942, 962)
- Women's Basketball achieved a record four-year score for them at a 991. The previous record was 986 for the 2010-14 four-year period. This marks the 4th year in a row that Women's Basketball has improved their four-year score (931, 947, 976, 986).
- Men's Basketball achieved a record four-year score for them at 973. Their previous high for a four-year score was 947 for the 2010-14 four-year period. This is the third year in a row that the four-year score has increase for this team (913, 918, 947).

- Men's Cross Country achieved its highest four-year eligibility score ever (981) and its highest overall four-year score ever (990). In addition, Men's Cross Country was given an upper confidence boundary statistical adjustment so their four-year score is a 998 now.
- Men's Tennis achieved their highest four-year score ever with a 966. Additionally they set the record for highest four year retention score (947) and highest four year eligibility score (984)
- Women's Golf for the 3rd year in a row has a perfect 1000 four-year score.
- Women's Soccer's achieved their highest four-year score of 983.
- Women's Tennis achieved their highest four-year retention score with a 982. The previous record was 971 for the 2010-14 four-year period.
- Women's Track achieved their highest four-year score with a 983. The previous record for Women's' Track was 981 from the 2010-14 four-year period. Women's Track also achieved their highest four-year eligibility score of 977.
  - Note: Women's Track Indoor and Outdoor have been combined into one score by the NCAA. This is also true for Men's Track
- Volleyball has tied its top four-year mark of 990 (2009-13 and 2010-14). This marks the third year in a row that the four-year mark has been 990 while the one-year mark is 1000. The marks of 990 for both retention and eligibility also tie the record for volleyball.
- Softball has achieved its highest four-year score with a 986. This marks the 5th year in a row that the softball team has improved its four-year score (893, 896, 925, 971, 981)
- **For the first time in the history of the APR, four year scores for all of the teams at ISU are above the 960 mark. The 2010-14 period was the first four-year period that all teams were above a 930.**

Summary

- 3 teams made one-year score improvements from the year before (Football, Women's Cross Country and Women's Soccer)
  - 4 teams (Men's Cross Country, Men's Tennis, Women's Golf and Volleyball) had the same one-year score, a perfect 1000, as they did in the 2013-14 school year.
- 9 Teams Made four-year score improvements from the year before. (Men's Basketball, Men's Cross Country, Football, Men's Tennis, Women's Basketball, Women's Cross Country, Women's Soccer, Softball, Women's Track)
  - Women's Golf can't go any higher because they have a four-year score of 1000 the last three years.
  - Volleyball stayed the same at 990
- 6 teams saw a decrease in their one-year scores (Men's Basketball, Men's Track, Women's Basketball, Softball, Women's Tennis, Women's Track)
- 2 teams saw a decrease in their four-year scores (Men's Track and Women's Tennis)

NCAA Division I 2014 - 2015 Academic Progress Rate Institutional Report

Institution: Idaho State University

Date of Report: 05/24/2016

This report is based on NCAA Division I Academic Progress Rate (APR) data submitted by the institution for the 2011-12, 2012-13, 2013-14 and 2014-15 academic years. Institutions are encouraged to forward this report to appropriate institutional personnel on campus.

[Note: All information contained in this report is for four academic years. Some squads may still have small sample sizes within certain sport groups. In accordance with the Family Educational Rights and Privacy Act's (FERPA's) interpretation of federal privacy regulations, institutions should not disclose statistical data contained in this report for cells made up of three or fewer students without student consent.]

Sport	APR			Eligibility/Graduation		Retention	
	Multiyear Rate (N)	Multiyear Rate Upper Confidence Boundary	2014 - 2015 (N)	Multiyear Rate	2014 - 2015	Multiyear Rate	2014 - 2015
Men's Basketball	973 (49)	N/A	960 (14)	979	962	957	958
Men's Cross Country	990 (26)	998	1000 (7)	981	1000	980	1000
Football	977 (304)	N/A	971 (77)	971	971	961	964
Men's Tennis	966 (34)	N/A	1000 (7)	984	1000	947	1000
Men's Track	973 (114)	N/A	960 (25)	959	920	977	1000
Women's Basketball	991 (61)	N/A	982 (15)	1000	1000	973	963
Women's Cross Country	982 (84)	N/A	1000 (23)	976	1000	982	1000
Women's Golf	1000 (31)	N/A	1000 (8)	1000	1000	984	1000
Women's Softball	986 (71)	N/A	970 (17)	986	971	978	939
Women's Soccer	983 (93)	N/A	988 (22)	989	977	966	976
Women's Tennis	983 (31)	N/A	970 (9)	983	941	982	1000

* Denotes data representing three or fewer student-athletes. In accordance with FERPA's interpretation of federal privacy regulations, institutions should not disclose statistical data contained in this report in cells made up of three or fewer students without student consent.
N/A = No APR or not applicable.
N = Number of student-athletes represented.
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NCAA Division I 2014 - 2015 Academic Progress Rate Institutional Report

Institution: Idaho State University

Date of Report: 05/24/2016

Sport	APR			Eligibility/Graduation		Retention	
	Multiyear Rate (N)	Multiyear Rate Upper Confidence Boundary	2014 - 2015 (N)	Multiyear Rate	2014 - 2015	Multiyear Rate	2014 - 2015
Women's Track	984 (159)	N/A	967 (41)	977	974	977	960
Women's Volleyball	990 (51)	N/A	1000 (13)	990	1000	990	1000

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University Of Idaho
Spring 2016 Academic Progress Rate (APR) Report Summary

The University of Idaho sponsors sixteen NCAA sports and of those, fourteen currently maintain a 4-year average of at least 950. In 2014-2015, seven of those sports posted a perfect 1000 single year score. Those sports include men's basketball, women's basketball, women's cross country, women's golf, women's tennis, women's track and women's volleyball. Women's golf scored a perfect 1000 for the fifth year in a row and was recently honored by the NCAA for performing in the top 10 percent of all squads in their respective sport.

Overall, the multiyear APR scores increased for the entire department. Idaho's average multiyear APR score, by sport, is 961.86, an increase of 6.63 points from the prior year's average. Idaho's average singe year APR score is 970.86. That is an increase of 3.3 points compared to the prior year's average.

Football and Men's Cross Country are the only sports below the benchmark 930 Multiyear Rate to be eligible for post-season competition. However, both teams met exceptions that provided relief to the post-season ban and associated penalties. Football's two-year average for academic years 2013-14 and 2014-15 was 953. This met the NCAA two-year APR average requirement of 950 to be exempt from all penalties. Their four-year average was 904, an 8-point increase from the prior four-year average. Men's Cross Country met the small roster exemption, allowing them to compete for post-season competition.

The Men's Golf team was set to incur penalties in 2015-16 for posting a rate below the 930 multiyear APR benchmark in 2014-15. However the team recovered an adjustment point from the 2010-11 academic year which bolstered the team multiyear rate above the 930 benchmark.

Football's implementation of the APR Improvement Plan under Head Coach Paul Petrino has proven effective as their single year rate has increased steadily over the past three years. The team incurred level-one penalties in 2014-15, received a conditional waiver for the level-two penalties in 2015-16 due to the increase in performance, and are projected to meet the 950 two-year average exemption that would provide relief from any additional penalties in 2016-17.

NCAA Division I 2014 - 2015 Academic Progress Rate Institutional Report

Institution: University of Idaho   Date of Report: 07/14/2016

This report is based on NCAA Division I Academic Progress Rate (APR) data submitted by the institution for the 2011-12, 2012-13, 2013-14 and 2014-15 academic years. Institutions are encouraged to forward this report to appropriate institutional personnel on campus.

[Note: All information contained in this report is for four academic years. Some squads may still have small sample sizes within certain sport groups. In accordance with the Family Educational Rights and Privacy Act's (FERPA's) interpretation of federal privacy regulations, institutions should not disclose statistical data contained in this report for cells made up of three or fewer students without student consent.]

Sport	APR			Eligibility/Graduation		Retention	
	Multiyear Rate (N)	Multiyear Rate Upper Confidence Boundary	2014 - 2015 (N)	Multiyear Rate	2014 - 2015	Multiyear Rate	2014 - 2015
Men's Basketball	965 (52)	N/A	1000 (13)	980	1000	948	1000
Men's Cross Country	926 (24) [5 3]	964	850 (5)	875	800	978	900
Football	904 (349) [9 4 2]	N/A	957 (85)	883	950	916	957
Men's Golf	953 (40)	N/A	930 (11)	960	955	945	905
Men's Tennis	957 (40)	N/A	917 (12)	942	889	943	944
Men's Track	956 (78)	N/A	969 (17)	893	906	980	938
Women's Basketball	962 (57)	N/A	1000 (13)	991	1000	934	1000
Women's Cross Country	980 (41)	N/A	1000 (13)	974	1000	974	1000
Women's Golf	1000 (33)	N/A	1000 (8)	1000	1000	1000	1000
Women's Soccer	986 (95)	N/A	988 (24)	1000	1000	971	974
Women's Swimming	956 (95)	N/A	981 (27)	956	1000	956	962

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NCAA Division I 2014 - 2015 Academic Progress Rate Institutional Report

Institution: University of Idaho

Date of Report: 07/14/2016

Sport	APR			Eligibility/Graduation		Retention	
	Multiyear Rate (N)	Multiyear Rate Upper Confidence Boundary	2014 - 2015 (N)	Multiyear Rate	2014 - 2015	Multiyear Rate	2014 - 2015
Women's Tennis	969 (34)	N/A	1000 (9)	969	1000	969	1000
Women's Track	972 (95)	N/A	1000 (26)	956	979	972	1000
Women's Volleyball	980 (52)	N/A	1000 (13)	929	1000	990	1000

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2014 - 2015 NCAA Division I Academic Progress Rate
Public Report

Institution: University of Idaho Date of Report: 04/18/2016

This report is based on NCAA Division I Academic Progress Rate (APR) data submitted by the institution for the 2011-12, 2012-13, 2013-14 and 2014-15 academic years.

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The following chart represents by-sport APR averages for noted subgroups. National aggregates are based on all squads that have certified their academic data as final.

Sport (N)	Multiyear APR	2014-2015 APR	Percentile Rank within Sport	Percentile Rank within All Sports	All Divison I	Public Institutions	Private Institutions	Football Bowl Subdivision	Football Championship Subdivision	Division I (Non-Football)
By Sport - Men's										
Baseball (300)	NA	NA	NA	NA	970	966	978	974	968	969
Basketball (350)	965	1000	40th-50th	10th-20th	964	960	970	967	960	965
Cross Country (315)	926	850	1st-10th	1st-10th	977	972	987	982	972	978
Football (251)	904	957	1st-10th	1st-10th	959	956	968	964	954	947

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2014 - 2015 NCAA Division I Academic Progress Rate

Public Report

Institution: University of Idaho Date of Report: 04/18/2016

Sport (N)	Multiyear APR	2014-2015 APR	Percentile Rank within Sport	Percentile Rank within All Sports	All Divison I	Public Institutions	Private Institutions	Football Bowl Subdivision	Football Championship Subdivision	Division I (Non-Football)
Fencing (18)	NA	NA	NA	NA	984	970	989	969	997	984
Golf (301)	953	930	1st-10th	10th-20th	983	980	988	986	980	982
Gymnastics (15)	NA	NA	NA	NA	986	986	995	989	1000	942
Ice Hockey (59)	NA	NA	NA	NA	987	984	989	988	993	983
Lacrosse (69)	NA	NA	NA	NA	977	973	979	985	977	975
Skiing (11)	NA	NA	NA	NA	983	980	988	982	987	978
Soccer (205)	NA	NA	NA	NA	974	970	977	973	976	973
Swimming (134)	NA	NA	NA	NA	980	976	985	980	983	978
Tennis (261)	957	917	10th-20th	10th-20th	979	978	982	982	978	979
Track (281)	956	969	20th-30th	10th-20th	969	965	979	974	963	973
Volleyball (22)	NA	NA	NA	NA	985	982	988	983	985	985
Water Polo (22)	NA	NA	NA	NA	984	981	985	988	991	976
Wrestling (77)	NA	NA	NA	NA	970	969	970	973	970	971
By Sport - Women's										
Basketball (348)	962	1000	10th-20th	10th-20th	978	975	984	978	978	978
Bowling (31)	NA	NA	NA	NA	971	966	978	989	963	985

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2014 - 2015 NCAA Division I Academic Progress Rate

Public Report

Institution: University of Idaho   Date of Report: 04/18/2016

Sport (N)	Multiyear APR	2014-2015 APR	Percentile Rank within Sport	Percentile Rank within All Sports	All Divison I	Public Institutions	Private Institutions	Football Bowl Subdivision	Football Championship Subdivision	Division I (Non-Football)
Cross Country (347)	980	1000	20th-30th	40th-50th	986	983	990	989	982	987
Fencing (23)	NA	NA	NA	NA	984	961	994	985	996	961
Field Hockey (78)	NA	NA	NA	NA	988	985	990	986	990	985
Golf (262)	1000	1000	90th-100th	90th-100th	989	987	993	992	987	987
Gymnastics (61)	NA	NA	NA	NA	992	992	993	991	996	995
Ice Hockey (35)	NA	NA	NA	NA	992	990	993	994	994	988
Lacrosse (107)	NA	NA	NA	NA	989	987	990	994	987	988
Rowing (87)	NA	NA	NA	NA	988	987	989	987	988	991
Skiing (12)	NA	NA	NA	NA	991	989	993	988	993	991
Soccer (331)	986	988	40th-50th	50th-60th	984	982	989	986	983	983
Softball (294)	NA	NA	NA	NA	981	978	989	985	977	983
Swimming (196)	956	981	1st-10th	10th-20th	990	988	992	990	992	988
Tennis (322)	969	1000	10th-20th	20th-30th	985	983	990	988	982	985
Track (333)	972	1000	20th-30th	20th-30th	981	977	988	983	977	984
Volleyball (333)	980	1000	20th-30th	40th-50th	984	982	991	987	982	985

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2014 - 2015 NCAA Division I Academic Progress Rate
Public Report

Institution: University of Idaho Date of Report: 04/18/2016

Sport (N)	Multiyear APR	2014-2015 APR	Percentile Rank within Sport	Percentile Rank within All Sports	All Divison I	Public Institutions	Private Institutions	Football Bowl Subdivision	Football Championship Subdivision	Division I (Non-Football)
Water Polo (32)	NA	NA	NA	NA	987	983	992	987	990	986
By Sport - Co-Ed										
Rifle (23)	NA	NA	NA	NA	981	980	1000	981	982	NA

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IDAHO NATIONAL LABORATORY

SUBJECT

Request for Idaho State Board of Education (Board) sponsorship of Idaho National Laboratory (INL) facility expansion project

REFERENCE

May 2016	Board received initial overview briefing on proposed project from INL Program Manager.
June 2016	Board members toured potential construction sites for new facilities on properties adjacent to INL operations. Board assigned two of its members to serve on a project feasibility/coordination team.

APPLICABLE STATUTE, RULE, OR POLICY

Idaho State Board of Education Governing Policies & Procedures, Section V.I. Real and Personal property and Services

BACKGROUND/DISCUSSION

The Idaho National Laboratory (INL) proposes to expand, through new construction, its Cybercore and Collaborative Computing Center (C3) operations in Idaho Falls. The Cybercore and C3 programs are currently carried out in smaller facilities at the INL site, and additional space is needed to accommodate the increased demand for the programs carried out in the two facilities. The Cybercore supports a wide range of cyber security research projects. The C3 provides massive, high-speed computational capability to support regional and national research operations. The new facility construction could be financed through bonds issued by the Idaho State Building Authority (ISBA). The ISBA would also oversee construction of the facilities. The preferred sites for the new Cybercore and C3 facilities include properties owned by the Board and/or the Idaho State University Foundation (Foundation), adjacent to existing INL research facilities.

Likely lease arrangements would include a ground lease of the construction site property from the Board to the ISBA. In parallel, lease arrangements would be established for the ISBA to lease the new facilities to the Board, which would sub-lease the facilities to the INL. Rent from INL for the facilities would be passed back through the Board to ISBA until the facilities were paid off, at which time all rent proceeds from INL would go to the Board and ISBA's role would be complete. The facility lease to INL would be triple net, with the lessee being responsible for all operational costs, utilities, applicable taxes, insurance, and maintenance. There would be no operational costs for the Board under the anticipated arrangements, and financing and project management responsibilities would be borne by ISBA, to suit Board interests.

The proposed use of the properties would help preserve contiguity of a growing INL Idaho Research Campus. The proposed lease arrangements parallel those currently used in the Board's lease of the Center for Advanced Energy Studies (CAES) facilities to the INL. The Board has been invited to be the state Sponsor for the project, a pre-requisite for using ISBA bonding authority. Bonding will also require Legislative action in the form of a concurrent resolution in the upcoming 2017 session.

A Board member-chaired working group has been established to work with INL, ISBA, Idaho State University (ISU) and the ISU Foundation, as needed, to flesh out plans and prepare options for Board action/decisions. On June 30, 2016, the Board's working group members (Hill and Atchley) received additional updates on the status of project planning and reviewed additional information on potential construction sites. Early discussions on the project have taken place with the Governor's Office. The project is being forwarded to the full Board for discussion and consideration of INL's sponsorship request.

IMPACT

Board sponsorship of the proposed INL Cybercore and C3 project will enable the initiative to move forward and will enhance the opportunities for joint research activities by the INL and regional research universities. The project will have a positive impact on the region and the state in two areas of critical importance to global competitiveness and national security. Following payment of debt for construction, lease payments from INL would redound to the Board and would be available to support additional strategic goals and objectives. No institution or agency dollars would be needed to carry out the two construction projects (each estimated at approximately $40 Million, for a total of $80 Million).

ATTACHMENTS

Attachment 1 – INL information update on Cybercore and C3 project Page 5
Attachment 2 – Background info on Idaho State Building Authority Page 25

STAFF COMMENTS AND RECOMMENDATIONS

Board sponsorship of this project will enable design and financial planning efforts to move forward. Following a decision to sponsor the project, the Board would have a number of decision points in the future prior to moving ahead with detailed design, construction, financing, and lease arrangements. Implementation would also be contingent upon legislative concurrence for the financing plan. The ISBA is highly-experienced in financing and managing major construction projects for the state. The proposed leasing arrangements would enable the INL funds which will drive the project to be used effectively and meet the needs of the Board. Staff recommends approval of Board sponsorship as a necessary step in fleshing out further planning for the initiative.

BOARD ACTION

I move to approve the request for Board sponsorship of the Idaho National Laboratory Cybercore and Collaborative Computing Center project, subject to subsequent approval of plans for financing and construction of the project through the Idaho State Building Authority.

Moved by_____________ Seconded by______________ Carried Yes____ No____

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Briefing to State Board of Education Working Group Members C3 and Cybercore Facilities

June 30, 2016

Dr. Kelly J. Beierschmitt,
Deputy Laboratory Director of Science and Technology

www.inl.gov

Idaho National Laboratory

State of Idaho Advantages from Facility Lease

Benefits for the state of Idaho to pursue the partnership with INL include:

- Provides a defined and steady income for the State Board of Education (SBOE)
- Utilizes underdeveloped state-owned properties
- Supports economic growth
- Creates opportunities for Idaho students to engage in nuclear and cybersecurity research
- Increases partnership between INL and SBOE in higher education and research

INL to Expand Research and Education Campus

Leased facilities will be procured to enhance the nuclear energy and national security missions at the lab

- Cybercore
  - Virtual Research Park to unify and integrate resources for urgent and high consequence national control systems security challenges
  - A holistic approach to people, partnerships and technology to ensure progress on hard challenges with expert support across multiple agency missions
  - Facilitates an elite talent pipeline for a unique interdisciplinary domain within cybersecurity
- Collaborative Computing Center (C3)
  - Center focused on collaboration to support advanced computation needs of the lab, academia and industry
  - C3 is an important capability that helps enable the Gateway for Accelerated Innovation in Nuclear (GAIN), Idaho universities, and modeling and simulation needs across the region

Idaho National Laboratory

Cybercore Advances University Collaborations

University Partnerships

- Enhances engagement with Idaho universities, including lab research initiatives at Boise State University's Cyber Center.

Internship Opportunities

- Provides opportunities for increased student internships in areas like cybersecurity and controls system engineering
- Supports graduate research and technology innovation

Idaho National Laboratory

Cybercore supports Idaho engagement

Idaho and Federal Partnerships

- Extends partnering with Idaho and federal agencies and other national labs on cybersecurity challenges related to critical infrastructure security.

Industry Engagement

- Increases opportunities for interactions and research with critical infrastructure owners and operators including Idaho-based utilities.

Cybercore Provides Career Opportunities

Some of the employment options for Idaho students include:

- Power Engineering
- Wireless Research
- Controls Systems Engineering
- Cybersecurity
- Experimental Mechanics
- Chemistry
- Physics
- Thermodynamics
- Nuclear Engineering
- Electrical Engineering

Idaho National Laboratory

C3 Advances University Collaborations

University Partnerships

- Extends university computation and research opportunities, as the computational hours available for university collaborators will significantly increase as additional capacity is installed at C3.
- The computational hours available for university collaborators will significantly increase as additional capacity is installed at C3.

Interns and Post Doctoral Opportunities

- Provides dedicated office and research space to support university researchers, student interns and post doctoral collaboration and computation..
- Enhances opportunities for students to engage in nuclear energy research, computation and collaboration with the lab, for example, the recently announced $5.5 million in research allocations from DOE to Idaho Universities.

Idaho National Laboratory

C3 supports Idaho engagement

Idaho and Federal Partnerships

- Extends partnership opportunities with the State of Idaho in modeling and simulation research and collaborative computational science efforts.

Industry Engagement

- Increases opportunities for cooperation with Idaho industry interested in nuclear and clean energy research.
- Facilitates greater access to research expertise, computation science skills, and computational power needed to solve technical challenges to the adoption and expansion of nuclear energy.

C3 Provides Career Opportunities

Some of the employment options for Idaho students include:

- Nuclear Engineering
- Computational Science
- Material Science
- Computer Science
- Radiological Chemistry
- Environmental Science
- Nuclear Chemistry
- Physics
- Thermodynamics
- Computational Mechanics
- Electrical Engineering
- Structural Mechanics

INL/Idaho State Board of Education partnership request

Sponsorship by the SBOE for leasing Cybercore and C3 facilities to INL utilizing the Idaho State Building Authority (ISBA) processes.

- With SBOE approval to sponsor, the ISBA with the support from INL, as requested will:
  - Draft the required legislation
  - Introduce the legislation for approval by legislative branches
- With legislative approval, the ISBA, with support from INL, as requested will:
  - Acquire property (if needed)
  - Plan and develop each facility
  - Contract for design, construction management and construction of each facility
  - Structure and gain required financing for each facility
  - Develop leases for each facility between the ISBA and SBOE
  - Develop sub-leases for each facility between SBOE and INL

Possible schedule and risk reduction opportunities

- With approval of the SBOE, INL would contract the design for both facilities to expedite schedule and possible reduction of lease costs to INL or inclusion of the design costs as a part of each lease.
- If all parties agree to INL contracting the designs/construction bid documents and if required legislation is not approved, SBOE would define the lease or purchase prices for each preferred site for developers to utilize the INL contracted design to construct leased facilities for INL.
- With approval of the SBOE, INL and Idaho State Building Authority (ISBA) would develop the request for proposals (RFP) documents for construction management services and construction for each facility
- With approval of the SBOE, INL and ISBA would develop sub-lease requirements for each facility to support INL request for DOE approval.

C3 and Cybercore Preferred Sites

June 24, 2016

www.inl.gov

Idaho National Laboratory

C3 and Cybercore Preferred sites

Ownership of land adjacent /intermixed within the INL Campus

1 Kennedy Trust

2 & 3 Bauchman Kingston

4 Idaho State Board of Education

5 ISU Foundation

6 ERC III, LLC (Voigt)

7 LDS Church

8 REL Facilities, LLC (Ormond)

9 ISU Foundation

10 ERC III, LLC (Voigt)

11 & 12 Idaho State Board of Education

13 & 14 ISU Foundation

15, 16 & 17 Battelle Facility Owner (Boyer)

18 Daggitt, LLC

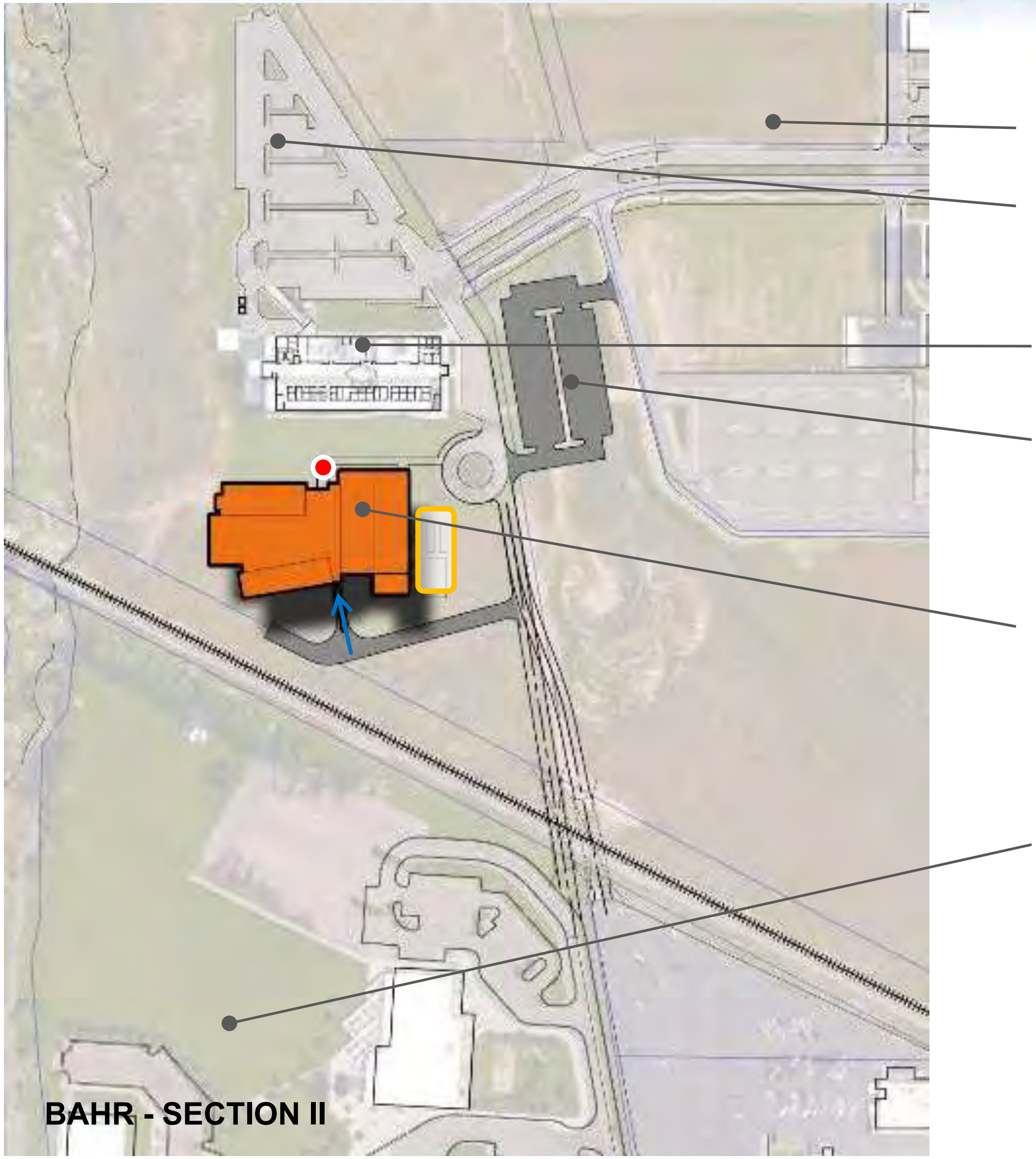
19 Idaho State Board of Education

\# **Preferred Sites**

\# **Alternative Sites**

Idaho National Laboratory

C3 Preferred sites

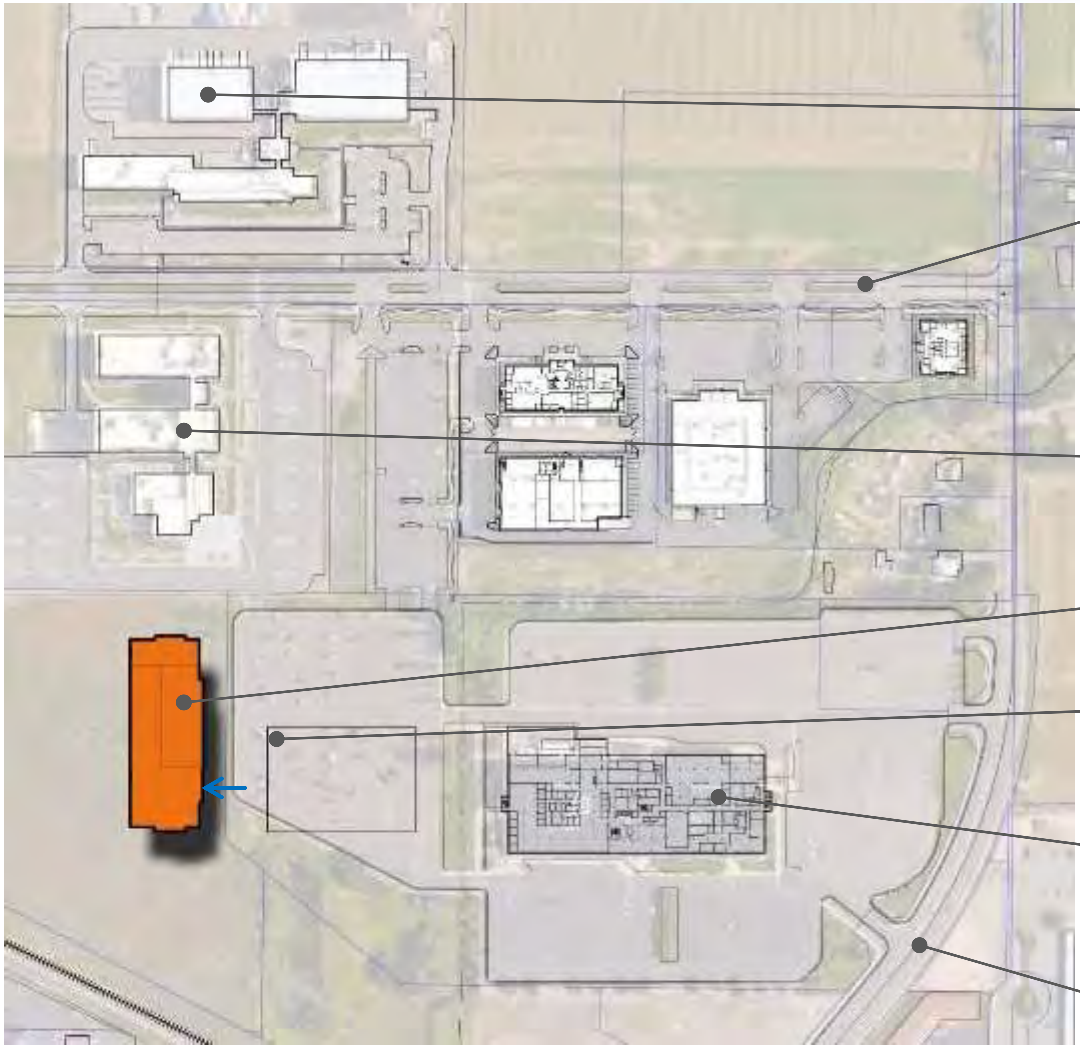


C3 — Floor Plans

LEVEL TWO

LEVEL ONE

Cybercore — Preferred sites



INL – ENERGY SYSTEMS LABORATORY (ESL)

UNIVERSITY BLVD.

INL – ENERGY INNOVATION LABORATORY (EIL)

PROPOSED CYBERCORE FACILITY

PROPOSED CYBERCORE FACILITY PARKING

INL – ENGINEERING RESEARCH OFFICE BUILDING (EROB)

FREMONT AVE.

Cybercore — Floor Plans

LEVEL TWO

LEVEL ONE

INL

Idaho National Laboratory

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SUMMARY
of
IDAHO STATE BUILDING AUTHORITY
June 1, 2016

The Authority was created in 1974 by enactment of the Idaho State Building Authority Act of 1974 (the "Act"). In general, the Act empowers the Authority to acquire, construct and develop facilities for lease to the state government entities and community college districts and to finance the costs by issuing notes and bonds payable from the lease revenues derived from those facilities. The Authority is authorized to provide facilities for state agencies and institutions and for community college districts provided, as a condition of "financing" of such facilities, the state agency or community college district obtains "prior legislative approval" to enter into agreements with the Authority for financing of the facilities.

The Act delegates broad powers and discretion to the Authority relating to acquisition of property, planning and development of facilities, contracting for design and construction of facilities, and structuring of financing.

The Authority is governed by a board of seven commissioners appointed by the Governor with the advice and consent of a majority of the members of the Senate. Commissioners serve for terms of five years.

Throughout the financing and development of projects, the Authority works closely with the using agency and others involved in the project. Thorough participation by the using agencies and other intended occupants is critical through design and construction to ensure the facilities meet their needs and preferences and that the project can be delivered within budget and within the time required. The Authority's financing activities, project budgets, contracts and accounts relating to projects are open to review at all times and the Authority conducts its business subject to the Idaho Public Records Act and the Idaho Open Meetings Law.

Financing of Projects. The Authority may not finance any facility unless: (a) the state body or community college district has prior legislative approval to enter into agreements with the Authority for specific facilities; (b) the state body or community college district has entered into appropriate agreements with the Authority for the facilities; and (c) the Authority board finds that the facilities "will be of public use and will provide a public benefit". The Authority can, if necessary, arrange interim financing to pay project-related costs to be incurred prior to issuing bonds for the project. The interim financing is repaid from the proceeds of bonds together with all financing expenses and other anticipated costs to complete the project.

Bonds are typically underwritten and sold on the bond market as either tax-exempt or taxable bonds depending upon the mix of intended users of the facilities. For portions of the facility to be used by state agencies, local government entities and qualified non-profit entities, tax-exempt interest bonds may be used. For portions of the facilities to be used by federal agencies or private entities, taxable bonds are issued. The Authority requires that all bonds be offered on a first-priority basis to Idaho residents.

The term of bonds is determined based upon the amount of total financing required, the amount available for using entities to pay annual rent to the Authority to service the debt, and other factors.

Acquisition of Property. The Authority may purchase, lease or otherwise acquire real property for development of facilities. Where the facilities to be financed and developed by the Authority are to be located on land already owned by the state of Idaho, the Authority typically enters into a long-term ground lease with the state for the land and simultaneously enters into a lease-back of the facilities to be constructed to the primary using agency which may enter into subleases with other users. The Act expressly authorizes the state to lease, with or without consideration, real or personal property to the Authority for a term not to exceed 50 years. The ground lease and lease-back agreement each include provisions that both leases terminate automatically when all bonds issued to finance the project have been paid in full and full ownership of the facilities then revert to the state. The agreements for acquisition of land and leases may vary depending upon the particular requirements of a project.

Design, Construction and Development. The Authority has considerable flexibility in contracting for design and construction of facilities. The Act expressly states that contracts for construction or acquisition of facilities need not comply with provisions of any other state law applicable to contracts for construction or acquisition by the state. The Authority has used various contracting methods for development of facilities, including competitive bidding, competitive negotiation, construction management, and design-build. The method used is determined based upon the particular characteristics of the project and needs of the using agency.

Completed Projects. The Authority has successfully financed numerous projects, including:

- Several state government offices in Lewiston, Boise and Idaho Falls;
- Teaching and housing facilities at the School for Deaf & Blind in Gooding;
- Several state prison projects for Department of Correction;
- Headquarters and park facilities for Department of Parks & Recreation;
- Housing and related facilities at Idaho State School & Hospital for Department of Health & Welfare;
- Renovation and Expansion of Idaho State Capitol Building
- Capitol Mall Parking facilities
- Idaho Water Center for University of Idaho and Department of Water Resources
- Higher Educations projects on the campuses of University of Idaho, Idaho State University, Boise State University, North Idaho College, Lewis & Clark State College, College of Southern Idaho and Eastern Idaho Technical College.

BOISE STATE UNIVERSITY

SUBJECT

Request to license Oracle's HCM Cloud application under the existing Public Sector Agreement for Oracle Cloud Services.

REFERENCE

February 2011	Board approved licensing agreement for $330,000 with iStrategy to assist in final phase of data warehouse move from PeopleSoft enterprise resource planning systems to new Human Resources/Payroll, Financial, and Financial Aid modules. Feasibility of moving all eight public postsecondary institutions to iStrategy in support of the Statewide Longitudinal Data System (SLDS) was considered but deemed infeasible due to cost, timing, and system incompatibility concerns.
April 2011	Enterprise System Roadmap Implementation Project update (information item) provided by Boise State University.
October 2011	Board approved (not to exceed) $1.5M contract with CIBER for consulting and project management services to support student services system upgrades as part of the university's continuing Enterprise Roadmap project. Board discussed feasibility of system-wide software platforms for support of SLDS.

APPLICABLE STATUTE, RULE, OR POLICY

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

BACKGROUND/DISCUSSION

In April of 2011, Boise State University (BSU) presented the Idaho State Board of Education (Board) with its Enterprise System Roadmap as a strategy to transition to a more sustainable and maintainable system state, and more importantly, to gain more value and effectiveness from our enterprise systems. Since that presentation, many large projects have been completed including:

- PeopleSoft Campus Solutions refresh
- Infrastructure Upgrades
- Identity & Access Management
- myBoiseState
- Data Warehouse for Student data

- User Productivity Kit
- Project Management Office
- eAdvising
- myBoiseState Mobile
- PeopleSoft Human Capital Management renovation project
- Established University cyber infrastructure
- Expanded learning and discovery technologies in the classroom
- Implemented Hobsons admissions systems
- Expanded IT communications, training offerings and learning opportunities
- Developed Online Major Change application

In furtherance of its effort to shift resources from sustaining systems to innovating and advancing systems, in April 2015, BSU embarked on a project to transition from its on-site PeopleSoft financial system to Oracle's ERP Cloud product. BSU partnered with Oracle as a charter institution and on July 1, 2016, became the first higher education institution in the world to go-live on the cloud software. The project aligns with the institutional commitment to reduce customizations and operating costs and embrace best practices in process improvement, creating a more sustainable operation.

Migrating enterprise systems to the cloud has many benefits to BSU. The operating costs are lower than on-site systems. Cloud systems also eliminate the need for costly multi-million dollar upgrades as technological improvements are added to the cloud every six months through version releases.

In addition, system security has been strengthened in the Oracle ERP Cloud as it:

- Reduced critical security software patching requirements. Keeping all of the technologies required to securely maintain and patch the PeopleSoft infrastructure was becoming unwieldy, and, in some cases, BSU was at the end-of-life on operating systems with no critical patches available.

- Allowed BSU to deploy end-to-end encryption on all data. The mix and match technologies used for PeopleSoft caused technical issues with deploying end-to-end encryption.

- Meets and attests to Payment Card Industry (PCI), Family Educational Rights and Privacy Act (FERPA), Gramm-Leach Bliley Act (GLBA), and Health Insurance Portability and Accountability Act (HIPPA) compliance requirements. As a service provider, Oracle Cloud meets Service Organization Control (SOC) 1, 2 and 3 reporting requirements and follows Statement on Standards for Attestation Engagements No. 16 (SSAE 16) audit standards.

As part of the Enterprise Resource Planning (ERP) Cloud project, BSU also implemented a new change facilitation process. Recognizing that campus units also need to "implement" in order to achieve the maximum return on investment (ROI), a significant amount of effort was spent on individual campus units' process improvement. Historically, BSU found that campus added new tasks to existing tasks when new systems replaced old. Rarely were processes evaluated to determine how they could evolve at the unit level. Over 400 people were actively engaged in the process redesign sessions. Unit level decision points were tracked against related leadership goals, which will allow BSU to calculate the project ROI. Rapidly improving cloud technology is only valuable if BSU actually implements the new functionality. The strategies used for this implementation will be repeated for each incremental roll-out of functionality ensuring BSU maximizes the tool on an ongoing basis. This process is unique in higher education and BSU has been asked to present this process at conferences and to provide assistance to other institutions.

IMPACT

The ERP Cloud project replaced all of BSU's financial, procurement and reporting applications and introduced new post award grant functionality. The next step in the process involves replacing the PeopleSoft Human Capital Management system. Like the old PeopleSoft finance system, BSU is operating on a version that is no longer supported.

BSU has negotiated the licensing of the Oracle HCM Cloud product under the terms of its existing Public Sector Agreement for Oracle Cloud Services to replace its PeopleSoft HCM suite. The contract allows BSU to reduce the maintenance cost of its PeopleSoft products during the implementation period.

The product includes modules addressing:

- Core HR and Benefits
- Payroll
- Time and Labor
- Performance Management (new)
- Talent Review (new)
- Succession Management (new)
- Goals Management (new)

The total cost of the product suite of $2,147,963 is offset by PeopleSoft maintenance cost savings of $867,090 for a net cash flow over five years of $1,295,273 million. The source of funding is institutional funds set aside for system investments and current operating budget.

This investment will provide state-of-the-art technology and allow for improved business processes. Employees will benefit from improved efficiencies, more self-service options and greater access to transactional data to support analysis. As with the finance project, BSU will work closely with campus to ensure adoption of the features and maximize ROI in alignment with program prioritization goals.

ATTACHMENTS

STAFF COMMENTS AND RECOMMENDATIONS

This project—adoption of a state-of-the-art Human Capital Management (HCM) system—is part of an ongoing sequence of initiatives at BSU to migrate central data systems to the cloud and to enhance usability and security of operations. The institution has been diligent in coordinating a highly complex project among its multiple users and stakeholders. The proposed licensing arrangement should alleviate many of the follow-on support and software patching headaches that have been typical in legacy, on-line systems. Staff recommends approval.

BOARD ACTION

I move to approve the request by Boise State University to execute an ordering document under the Public Sector Agreement for Oracle Cloud Services to license the products as presented to the Board in Attachment 1.

Moved by __________ Seconded by __________ Carried Yes _____ No _____

ORACLE

ORDERING DOCUMENT

Oracle America, Inc.
500 Oracle Parkway
Redwood Shores, CA 94065

Name	Boise State University	**Contact**	Max Johnson
Address	1910 University Drive	**Phone Number**	208-426-3033
	BOISE ID 83725	**Email Address**	Maxdavis-johnson@boisestate.edu

New Subscription

Cloud Services			**Service Period: 60 months**	
Data Region: North America	**Quantity**	**Term**	**Unit Net Price**	**Net Fee**
B85800 - Oracle Human Capital Management Base Cloud Service - Hosted Employee	6500	60 mo	2.08	811,200.00
B67290 - Oracle Fusion Global Payroll Cloud Service - Hosted Named User	6500	60 mo	1.12	436,800.00
B75365 - Oracle Fusion Time and Labor Cloud Service - Hosted Named User	6500	60 mo	0.48	187,200.00
B67291 - Oracle Fusion Goal Management Cloud Service - Hosted Named User	4250	60 mo	0.32	81,600.00
B67293 - Oracle Fusion Performance Management Cloud Service - Hosted Named User	4250	60 mo	0.32	81,600.00
B67294 - Oracle Fusion Talent Review and Succession Management Cloud Service - Hosted Named User	4250	60 mo	0.16	40,800.00
B67295 - Oracle Fusion Workforce Compensation Cloud Service - Hosted Named User	4250	60 mo	0.48	122,400.00
B84490 - Oracle Additional Test Environment for Oracle Fusion Cloud Service - Each	1	60 mo	1,000.00	60,000.00
B84490 - Oracle Additional Test Environment for Oracle Fusion Cloud Service - Each	1	60 mo	1,000.00	60,000.00
B67339 - Oracle Java Cloud Service - SaaS Extension - S2 - Hosted Environment	1	60 mo	351.795	21,107.70
B67339 - Oracle Java Cloud Service - SaaS Extension - S2 - Hosted Environment	1	60 mo	351.795	21,107.70

B67340 - Oracle Java Cloud Service - SaaS Extension - S4 - Hosted Environment	1	60 mo	1,056.795	63,407.70
B67336 - Oracle Database Cloud Multitenant Service - S20 - Hosted Environment	1	60 mo	634.50	38,070.00
B67336 - Oracle Database Cloud Multitenant Service - S20 - Hosted Environment	1	60 mo	634.50	38,070.00
B67337 - Oracle Database Cloud Multitenant Service - S50 - Hosted Environment	1	60 mo	1,410.00	84,600.00
		Subtotal		2,147,963.10

Fee Description		Net Fee
Cloud Services Fees		2,147,963.10
Net Fees		2,147,963.10
Total Fees		2,147,963.10

A. Terms of Your Order

1. Agreement

This order incorporates by reference the terms of the **Public Sector Agreement for Cloud Services US-CSA-QT5341943** and all amendments and addenda thereto (the "Agreement"). The defined terms in the Agreement shall have the same meaning in this order unless otherwise specified herein.

2. Payment Terms:

Net 30 days from invoice date

3. Payment Frequency:

Quarterly Arrears

4. Currency:

US Dollars

5. Offer Valid through:

26-AUG-2016

6. Services Period

The Services Period for the Services commences on the date stated in this order. If no date is specified, then the "Cloud Services Start Date" for each Service will be the date that the User login names and password are issued to you to access the Services, and the "Consulting/Professional Services Start Date" is the date that Oracle begins performing such services.

7. Service Specifications

Service Specifications applicable to the Cloud Services and the Consulting/Professional Services ordered may be accessed at www.oracle.com/contracts.

8. Renewals

Notwithstanding any statement to the contrary in the Services Specifications, the parties expressly agree that the Cloud Services acquired under this order will not Auto-Renew.

The Unit Net Price for the renewal will not increase by more than 4% of the Unit Net Price for such Cloud Service set forth in this order. The Cloud Services may not be renewed as described in this paragraph if: (i) Oracle is no longer making such Cloud Services generally available to commercial customers, or (ii) You are seeking to cancel or reduce the ordered quantity of the Cloud Services set forth in this order.

B. Additional Order Terms

1. Shelving of Licenses

a) Program Licenses Subject to Shelving. In order to use the Cloud Services specified in the Cloud Services table above, and subject to the terms of this provision, You agree to desupport, and not to use, the non-Cloud Oracle program licenses listed in the attached License Shelving Exhibit during the Shelving Period (as defined below). The desupport and non-use of such non-Cloud Oracle program licenses in accordance with the terms of this "Shelving of On Premise Program Licenses" section shall be referred to as "shelving." The Oracle program licenses listed in the License Shelving Exhibit are those on-premise program licenses You previously acquired under a separate contract with Oracle, and are referred to as the "Shelved On Premise Licenses." The shelving of the Shelved On Premise Licenses is subject to the requirements set forth in this "Shelving of On Premise Program Licenses" section. Notwithstanding anything to the contrary, You acknowledge and agree that the Shelved On Premise Licenses may only include Oracle on-premise program licenses for which You maintain technical support in accordance with Your separate contract with Oracle for those licenses and technical support services up to the commencement of the Transition Period (as defined below).

b) Transition Period. Except as otherwise provided in this section, You may continue to use the Shelved On Premise Licenses and Oracle technical support for such on-premise program licenses in accordance with Your separate contract with Oracle for those licenses and technical support services during the period beginning on the Cloud Services Start Date and ending on the earlier of the following to occur (the "Initial Transition Period"): (i) six months from the Cloud Services Start Date, or (ii) Your written notice to Oracle of the commencement of the Shelving Period for the Shelved On Premise Licenses. Notwithstanding anything to the contrary in Your separate contract for technical support services for the Shelved On Premise Licenses, during the Initial Transition Period only, Oracle will provide technical support limited to product support services, security patch updates, critical patch updates and tax, legal and regulatory updates (but not any major version release updates) for the Shelved On Premise Licenses (the "Limited On Premise Support") at no additional charge. If the Initial Transition Period ends under clause (i) of the preceding paragraph, You may elect to continue using the Shelved On Premise Licenses and receiving the Limited On Premise Support in accordance with the separate contract for such program licenses and technical support services by purchasing additional Limited On Premise Support for the Shelved On Premise Licenses in additional three month increments (each increment, an "Extended Transition Period" and collectively, the "Extended Transition Periods"); provided that, (1) all such Extended Transition Periods may not exceed a cumulative total of sixteen (16) consecutive months, and (2) in no event may the total cumulative period of the Initial Transition Period and the Extended Transition Periods (collectively, the "Transition Period") exceed twenty-two (22) consecutive months as measured from the Cloud Services Start Date. For each three month Extended Transition Period, You will be billed 8% of the previously annualized support fee quarterly, in arrears, for the Limited On Premise Support provided for the Shelved On Premise Licenses. You are not eligible for an Extended Transition Period if the Initial Transition Period ends under clause (ii) of the preceding paragraph, and any Extended Transition Period then in effect shall immediately end upon Your providing notice to Oracle of the commencement of the Shelving Period under such clause (ii). At the commencement of the Transition Period Oracle will issue a credit for any unused Oracle technical support services fees that You prepaid for the Shelved On Premise Licenses that remain unused as of the commencement of the Transition Period, if any, or if there is no Transition Period, then as of the commencement of the Shelving Period, provided that the invoices for such technical support services have been paid in full. This credit will be applied against Your first invoice for the Cloud Services acquired under this order and may not be used by You for purchase of any other Oracle products or services.

c) Shelving Period. The period for which the Shelved On Premise Licenses are considered to be shelved will commence at the end of the Transition Period and will end upon the earlier of the following to occur (the "Shelving Period"): (1) the end of the Services Period specified in this order, (2) Your resumption of use of the Shelved On Premise Licenses, or (3) Your non-compliance as described in the "Non Compliance" section below. If the Shelving Period ends under clause (1) of the prior sentence, then You may extend the Shelving Period by entering into an order with Oracle to renew the Cloud Services that expressly extends the Shelving Period for the Shelved On Premise Licenses listed in the License Shelving Exhibit. During the Shelving Period, You must: (i) not use the Shelved On Premise Licenses for any purposes other than read-only access to historical archived data, (ii) not receive or use the benefit of any direct or indirect Oracle technical support in any manner, including but not limited to updates, patches, fixes, accessing historical archived data, phone support, or on-line support accessible through a web browser or other connectivity tool, for the Shelved On Premise Licenses, and (iii) continue to maintain Oracle technical support for Your remaining program licenses contained in the license set of the Shelved On Premise Licenses (i.e., those program licenses not specifically identified in the License Shelving Exhibit) in accordance with the terms of Your separate contract for those Oracle program licenses.

d) Certification. At the end of the Transition Period, and annually thereafter during the Shelving Period, You are required to certify in writing to Oracle that the Shelved On Premise Licenses are desupported and unused as required under this "Shelving of On Premise Program Licenses" section.

e) Non Compliance. If You are not in compliance with the requirements set forth in this "Shelving of On Premise Program Licenses" section at any time during the Shelving Period or if the Cloud Services under this order are terminated prior to the end of the initial Service Period, then as of the date of non-compliance or termination, as applicable: (i) the Shelving Period shall end and the Shelved On Premise Licenses are then no longer shelved under these provisions, (ii) the repricing rules of the Oracle technical support policies located at http://www.oracle.com/support/policies.html will apply to the Shelved On Premise Licenses, and (iii) a reinstatement fee and applicable back support will be charged for the Shelved On Premise Licenses.

f) Unshelving of On Premise Licenses. Except as provided in the "Non Compliance" section above, You may resume use of the Shelved On Premise Licenses in accordance with Your separate license agreement, and technical support will be reinstated at the annual rate previously in effect, (1) at any time during the Services Period, provided that You provide Oracle with prior written notice of Your intention to resume use of the Shelved On Premise Licenses and You pay all technical support fees for the Shelved On Premise Licenses no later than 30 days from the resumption of use, or (2) at the end of the Services Period, provided that You resume payment for technical support of the Shelved On Premise Licenses no later than 30 days from the end of the Services Period. If You do not pay all technical support fees as stated in the preceding sentence, then (i) the repricing and matching support level rules of the Oracle technical support policies (located at http://www.oracle.com/support/policies.html) will be applied to the applicable remaining supported licenses as defined in the Oracle technical support policies, and (ii) should You wish to support the license at a future date, a reinstatement fee and applicable back support for the period commencing at the earlier of Your resumption of use or the end of the Services Period will be charged for the Shelved On Premise Licenses. For clarity, this order for Cloud Services, and all rights and obligations hereunder (including payment obligations), shall remain in full in force and effect for the duration of the Services Period notwithstanding any resumption of use by You of the Shelved On Premise Licenses prior to the end of the Services Period.

g) Additional On Premise Licenses. In the event that You require additional non-Cloud Oracle program licenses for one or more of the Shelved On Premise Licenses, You must first unshelve the required number of licenses, up to the total number shelved, in accordance with the "Unshelving of On Premise Licenses" section above. You may not purchase additional licenses for that program until all Shelved On Premise Licenses have been unshelved.

2. Restricted Use

The following products are restricted and are not for the access, use, or benefit of student employees:

- Oracle Fusion Performance Management Cloud Service
- Oracle Fusion Talent Review and Succession Management Cloud Service
- Oracle Fusion Workforce Compensation Cloud Service

3. Non-appropriation of Funds

In the event sufficient budgeted funds are not available for a new fiscal period due to a lack of State Legislature appropriated funds, You may terminate this Ordering Document immediately without penalty or expense as to the remaining portion of the ordered service period; provided, however, that: (a) for each of the five 12-month terms of the order, You must provide a purchase order, and (b) Your issuance of each 12-month purchase order shall signify to Oracle that all funds for the given 12-month term have been fully appropriated and are available and no longer subject to any appropriations contingency. Notwithstanding the foregoing, You agree to pay for all services performed by Oracle prior to Oracle's receipt of Your notice of non-appropriations.

4. Service Level Credit

The Oracle Cloud Service Level Objective Policy, within the Hosting and Delivery Policies applicable to the Cloud Services ordered by You, establishes a Target System Availability Level objective and describes how Oracle defines, measures and reports system availability. Subject to the terms of this Section and the applicable terms and definitions of the Oracle Cloud Service Level Objective Policy, You may receive a Service Credit in the event that the System Availability Level is below the Target System Availability Level in two (2) consecutive monthly reporting periods or more than five (5) monthly reporting periods in the past twelve months ("Missed Service Level"). If You have more than one production instance within a Services Environment, the System Availability Level will be calculated as an average across all such production instances for a monthly reporting period. You must submit a written request to Oracle (including reference to any applicable service request number) no later than thirty (30) days after the Missed Service Level occurs. Following receipt of Your request and confirmation of Your eligibility to receive a Service Credit (defined below), for each monthly reporting period within the Missed Service Level, Oracle will credit to Your account an amount equal to one (1) day of Applicable Cloud Services Fees (as defined in the following paragraph) for every 1/10th of a percentage point that the System Availability Level is below the Target System Availability Level in the applicable monthly reporting period, up to a maximum credit of 10% of the Applicable Cloud Services Fees paid for that month ("Service Credit"). You shall be eligible to receive only one Service Credit per monthly reporting period of the Missed Service Level.

For purpose of calculating the Service Credit, "Applicable Cloud Services Fees" means the prorated Cloud Services fees that You paid to Oracle for the particular Cloud Service for the applicable monthly reporting period in which the Missed Service Level occurred. "Applicable Cloud Services Fees" do not include the fees for other Cloud Services or Professional Services ordered by You, or for other production Services Environments that did not experience System Availability Levels below the Target System Availability Level. The Service Credit will be provided only towards any outstanding balance for Cloud Services owed to Oracle under this order, and the remittance of such Service Credit will represent Your exclusive remedy, and Oracle's sole liability, for the Missed Service Level.

5. One-Time Extension of Shelving Transition Period

In consideration for this order, You have received a special one-time only Extended Transition Period and Transition Period as documented in B.1.b, Shelving of Licenses.

Boise State University

Signature	
Name	
Title	
Signature Date	

BILL TO / SHIP TO INFORMATION

Bill To		**Ship To**	
Customer Name	Boise State University	**Customer Name**	Boise State University
Customer Address	1910 University Drive BOISE ID 83725	**Customer Address**	1910 University Drive BOISE ID 83725
Contact Name	Max Johnson..	**Contact Name**	Max Johnson..
Contact Phone	208-426-3033	**Contact Phone**	208-426-3033
Contact Email	Maxdavis-johnson@boisestate.edu	**Contact Email**	Maxdavis-johnson@boisestate.edu

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License Shelving Exhibit

You have agreed to shelve the following on-premise program licenses You previously acquired under separate contract(s) with Oracle pursuant to the terms of Your Cloud Services order CPQ-51659:

Csi Number	Instance Number	Product Description	License Metric	Quantity
15507335	40311334	Peoplesoft Enterprise Workforce Scorecard	EMPLOYEE COUNT	330
15507335	40311254	Peoplesoft Enterprise Hcm Portal Pack	EMPLOYEE COUNT	330
14480469	38252888	Peoplesoft Enterprise Workforce Scorecard	EMPLOYEE COUNT	135000000
14480469	38252881	Peoplesoft Enterprise Hcm Warehouse	EMPLOYEE COUNT	135000000
15507342	40311290	Peoplesoft Enterprise Benefits Administration	EMPLOYEE COUNT	1000
15507342	40311289	Peoplesoft Enterprise Payroll For North America	EMPLOYEE COUNT	1000
15507342	40311288	Peoplesoft Enterprise Human Resources	EMPLOYEE COUNT	1000
15507342	40311287	Peoplesoft Enterprise Time And Labor	EMPLOYEE COUNT	1000
14486155	38134921	Peoplesoft Enterprise Epay	Employee Count	3300
14486155	38134906	Peoplesoft Enterprise Eprofile	Employee Count	3300
14472425	38055167	Peoplesoft Enterprise Benefits Admin. For Public Sector	VALUE	1
14486155	38134899	Peoplesoft Enterprise Ebenefits	Employee Count	3300
14486155	38134894	Peoplesoft Enterprise Ecompensation	Employee Count	3300
14486155	38134891	Peoplesoft Enterprise Edevelopment	Employee Count	3300
14472425	38055213	Peoplesoft Enterprise Time And Labor For Public Sector	VALUE	1
14472425	38055191	Peoplesoft Enterprise Payroll For Public Sector	VALUE	1
14472425	38055177	Peoplesoft Enterprise Human Resources For Public Sector	VALUE	1

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ORACLE®

PUBLIC SECTOR AGREEMENT FOR ORACLE CLOUD SERVICES

This Public Sector Agreement for Oracle Cloud Services (this "Agreement") is between Oracle America, Inc. ("Oracle") and the entity that has executed this Agreement as identified in the signature block below ("You"). This Agreement sets forth the terms and conditions that govern orders placed by You for Services under this Agreement.

1. AGREEMENT DEFINITIONS

1.1. "Ancillary Software" means any software agent or tool that Oracle makes available to You for download for purposes of facilitating Your access to, operation of, and/or use with, the Services Environment.

1.2. "Auto Renew" or **"Auto Renewal"** is the process by which the Services Period of certain Cloud Services under an order is automatically extended for an additional Services Period unless such Services are otherwise terminated in accordance with the terms of the order or this Agreement. The Service Specifications incorporated into Your order define which Cloud Services are eligible for Auto Renewal as well as any terms applicable to any such renewal. Please note: Auto Renewal does not apply to purchases under this Agreement. Please see Section 9.1 *infra* for renewal requirements.

1.3. "Cloud Services" means, collectively, the Oracle cloud services (e.g., Oracle software as a service offerings and related Oracle Programs) listed in Your order and defined in the Service Specifications. The term "Cloud Services" does not include Professional Services.

1.4. "Data Center Region" refers to the geographic region in which the Services Environment is physically located. The Data Center Region applicable to the Cloud Services is set forth in Your order.

1.5. "Oracle Programs" refers to the software products owned or licensed by Oracle to which Oracle grants You access as part of the Cloud Services, including Program Documentation, and any program updates provided as part of the Cloud Services.

1.6. "Professional Services" means, collectively, the consulting and other professional services which You have ordered. Professional Services include any deliverables described in Your order and delivered by Oracle to You under the order. The term "Professional Services" does not include Cloud Services.

1.7. "Program Documentation" refers to the user manuals referenced within the Service Specifications for Cloud Services, as well as any help windows and readme files for the Oracle Programs that are accessible from within the Services. The Program Documentation describes technical and functional aspects of the Oracle Programs. For Oracle Infrastructure-as-a-Service (IaaS) Cloud Services, "Program Documentation" includes documentation, help windows and readme files for the IaaS hardware products. You may access the documentation online at http://oracle.com/contracts or such other address specified by Oracle.

1.8. "Services" means, collectively, both the Cloud Services and Professional Services that You have ordered.

1.9. "Services Environment" refers to the combination of hardware and software components owned, licensed or managed by Oracle to which Oracle grants You and Your Users access as part of the Cloud Services which You have ordered. As applicable and subject to the terms of this Agreement and Your order, Oracle Programs, Third Party Content, Your Content and Your Applications may be hosted in the Services Environment.

1.10. "Service Specifications" means the descriptions on www.oracle.com/contracts, or such other address specified by Oracle, that are applicable to the Services under Your order, including any Program Documentation, hosting, support and security policies (for example, Oracle Cloud Hosting and Delivery Policies), and other descriptions referenced or incorporated in such descriptions or Your order.

1.11. "Services Period" refers to the period of time for which You have ordered Cloud Services as specified in Your order.

1.12. "**Third Party Content**" means all text, files, images, graphics, illustrations, information, data, audio, video, photographs and other content and material, in any format, that are obtained or derived from third party sources outside of Oracle and made available to You through, within, or in conjunction with Your use of, the Cloud Services. Examples of Third Party Content include data feeds from social network services, rss feeds from blog posts, data libraries and dictionaries, and marketing data.

1.13. "**Users**" means those employees, contractors, and end users, as applicable, authorized by You or on Your behalf to use the Cloud Services in accordance with this Agreement and Your order. For Cloud Services that are specifically designed to allow Your clients, agents, customers, suppliers, or other third parties to access the Cloud Services to interact with You, such third parties will be considered "Users" subject to the terms of this Agreement and Your order.

1.14. "**You**" and "**Your**" refers to the entity that has executed this Agreement.

1.15. "**Your Applications**" means all software programs, including any source code for such programs, that You or Your Users provide and load onto, or create using, any Oracle "platform-as-a-service" or "infrastructure-as-a-service" Cloud Services. Services under this Agreement, including Oracle Programs and Services Environments, Oracle intellectual property, and all derivative works thereof, do not fall within the meaning of the term "Your Applications."

1.16. "**Your Content**" means all text, files, images, graphics, illustrations, information, data (including Personal Data as that term is defined in the Data Processing Agreement for Oracle Cloud Services described in Section 11.2 below), audio, video, photographs and other content and material (other than Your Applications), in any format provided by You or on behalf of Your Users that reside in, or run on or through, the Services Environment.

2. TERM OF AGREEMENT

Unless this Agreement is terminated earlier as described below, You may place orders governed by this Agreement for a period of five years from the effective date of this Agreement (indicated below in Section 25). This Agreement will continue to govern any order for the duration of the Services Period of such order.

3. RIGHTS GRANTED

3.1 For the duration of the Services Period and subject to Your payment obligations, and except as otherwise set forth in this Agreement or Your order, You have the non-exclusive, non-assignable, worldwide limited right to access and use the Services that You ordered, including anything developed by Oracle and delivered to You as part of the Services, solely for Your internal business operations and subject to the terms of this Agreement and Your order, including the Service Specifications. You may allow Your Users to use the Services for this purpose and You are responsible for Your Users' compliance with this Agreement and the order.

3.2 You do not acquire under this Agreement any right or license to use the Services, including the Oracle Programs and Services Environment, in excess of the scope and/or duration of the Services stated in Your order. Upon the end of the Services ordered, Your right to access and use the Services will terminate.

3.3 To enable Oracle to provide You and Your Users with the Services, You grant Oracle the right to use, process and transmit, in accordance with this Agreement and Your order, Your Content and Your Applications for the duration of the Services Period plus any additional post-termination period during which Oracle provides You with access to retrieve an export file of Your Content and Your Applications. If Your Applications include third party programs, You acknowledge that Oracle may allow providers of those third party programs to access the Services Environment, including Your Content and Your Applications, as required for the interoperation of such third party programs with the Services. Oracle will not be responsible for any use, disclosure, modification or deletion of Your Content or Your Applications resulting from any such access by third party program providers or for the interoperability of such third party programs with the Services.

3.4 Except as otherwise expressly set forth in Your order for certain Cloud Services offerings (e.g., a private cloud hosted at Your facility), You acknowledge that Oracle has no delivery obligation for Oracle Programs and will not ship copies of such programs to You as part of the Services.

3.5 As part of certain Cloud Services offerings, Oracle may provide You with access to Third Party Content. The type and scope of any Third Party Content is defined in Your order or applicable Service Specifications. The third party owner, author or provider of such Third Party Content retains all ownership and intellectual property rights in and to that content, and Your rights to use such Third Party Content are subject to, and governed by, the terms applicable to such content as specified by such third party owner, author or provider, unless otherwise specified in Your order.

4. OWNERSHIP AND RESTRICTIONS

4.1 You retain all ownership and intellectual property rights in and to Your Content and Your Applications. Oracle or its licensors retain all ownership and intellectual property rights to the Services, including Oracle Programs and Ancillary Software, and derivative works thereof, and to anything developed or delivered by or on behalf of Oracle under this Agreement.

4.2 You may not and may not cause or permit others to:

a) remove or modify any program markings or any notice of Oracle's or its licensors' proprietary rights;
b) make the programs or materials resulting from the Services (excluding Your Content and Your Applications) available in any manner to any third party for use in the third party's business operations (unless such access is expressly permitted for the specific Services You have acquired);
c) modify, make derivative works of, disassemble, decompile, reverse engineer, reproduce, distribute, republish or download any part of the Services (the foregoing prohibitions include but are not limited to review of data structures or similar materials produced by programs), or access or use the Services in order to build or support, and/or assist a third party in building or supporting, products or Services competitive to Oracle;
d) perform or disclose any benchmark or performance tests of the Services, including the Oracle Programs,;
e) perform or disclose any of the following security testing of the Services Environment or associated infrastructure: network discovery, port and service identification, vulnerability scanning, password cracking, remote access testing, or penetration testing; and
f) license, sell, rent, lease, transfer, assign, distribute, host, outsource, permit timesharing or service bureau use, or otherwise commercially exploit or make available the Services, Oracle Programs, Ancillary Software, Services Environments or Oracle materials, to any third party, other than as expressly permitted under the terms of the applicable order.

5. SERVICE SPECIFICATIONS

5.1 The Services are subject to and governed by Service Specifications applicable to Your order. Service Specifications may define provisioning and management processes applicable to the Services (such as capacity planning), types and quantities of system resources (such as storage allotments), functional and technical aspects of the Oracle Programs, as well as any Services deliverables. You acknowledge that use of the Services in a manner not consistent with the Service Specifications may adversely affect Services performance and/or may result in additional fees. If the Services permit You to exceed the ordered quantity (e.g., soft limits on counts for Users, sessions, storage, etc.), then You are responsible for promptly purchasing such additional quantity to account for Your excess usage.

5.2 Oracle may make changes or updates to the Services (such as infrastructure, security, technical configurations, application features, etc.) during the Services Period, including to reflect changes in technology, industry practices, patterns of system use, and availability of Third Party Content. The Service Specifications are subject to change at Oracle's discretion; however, Oracle changes to the Service Specifications will not result in a material reduction in the level of performance, security or availability of the applicable Services provided to You for the duration of the Services Period.

5.3 Your order will specify the Data Center Region in which Your Services Environment will reside. As described in the Service Specifications and to the extent applicable to the Cloud Services that You have ordered, Oracle will provide production, test, and backup environments in the Data Center Region stated in Your order. Oracle and its affiliates may perform certain aspects of Cloud Services, such as service administration and support, as well as other Services (including Professional Services and disaster recovery), from locations and/or through use of subcontractors, worldwide.

6. USE OF THE SERVICES

6.1 You are responsible for identifying and authenticating all Users, for approving access by such Users to the Services, for controlling against unauthorized access by Users, and for maintaining the confidentiality of usernames, passwords and account information. By federating or otherwise associating Your and Your Users' usernames, passwords and accounts with Oracle, You accept responsibility for the confidentiality and timely and proper termination of user records in Your local (intranet) identity infrastructure or on Your local computers. Oracle is not responsible for any harm caused by Your Users, including individuals who were not authorized to have access to the Services but who were able to gain access because usernames, passwords or accounts were not terminated on a timely basis in Your local identity management infrastructure or Your local computers. You are responsible for all activities that occur under Your and Your Users' usernames, passwords or accounts or as a result of Your or Your Users' access to the Services, and agree to notify Oracle immediately of any unauthorized use. You agree to make every reasonable effort to prevent unauthorized third parties from accessing the Services.

6.2 You shall not use or permit use of the Services, including by uploading, emailing, posting, publishing or otherwise transmitting any material, including Your Content, Your Applications and Third Party Content, for any purpose that may (a) menace or harass any person or cause damage or injury to any person or property, (b) involve the publication of any material that is false, defamatory, harassing or obscene, (c) violate privacy rights or promote bigotry, racism, hatred or harm, (d) constitute unsolicited bulk e-mail, "junk mail", "spam" or chain letters; (e) constitute an infringement of intellectual property or other proprietary rights, or (f) otherwise violate applicable laws, ordinances or regulations. In addition to any other rights afforded to Oracle under this Agreement, Oracle reserves the right, but has no obligation, to take remedial action if any material violates the restrictions in the foregoing sentence (the "Acceptable Use Policy"), including the removal or disablement of access to such material. Oracle shall have no liability to You in the event that Oracle takes such action. You shall have sole responsibility for the accuracy, quality, integrity, legality, reliability, appropriateness and ownership of all of Your Content and Your Applications. To the extent not prohibited by applicable law, You agree to defend and indemnify Oracle against any claim arising out of a violation of Your obligations under this section.

6.3 You are required to accept all patches, bug fixes, updates, maintenance and service packs (collectively, "Patches") necessary for the proper function and security of the Services, including for the Oracle Programs, as such Patches are generally released by Oracle as described in the Service Specifications. Oracle is not responsible for performance or security issues encountered with the Cloud Services that result from Your failure to accept the application of Patches that are necessary for the proper function and security of the Services. Except for emergency or security related maintenance activities, Oracle will coordinate with You the scheduling of application of Patches, where possible, based on Oracle's next available standard maintenance window.

7. TRIAL USE AND PILOT CLOUD SERVICES

7.1 For certain Cloud Services, Oracle may make available "trials" and "conference room pilots" for non-production evaluation purposes. Cloud trials and conference room pilots must be ordered under a separate agreement.

7.2 Oracle may make available "production pilots" for certain Cloud Services under this Agreement. Production pilots ordered by You are described in the Service Specifications applicable to Your order, and are provided solely for You to evaluate and test Cloud Services for Your internal business purposes. You may be required to order certain Professional Services as a prerequisite to an order for a production pilot.

8. FEES AND TAXES

8.1 All fees payable to Oracle are due within thirty (30) days from the invoice date. Once placed, Your order is non-cancelable and the sums paid nonrefundable, except as provided in this Agreement or Your order. You agree to pay any sales, value-added or other similar taxes imposed by applicable law that Oracle must pay based on the Services You ordered, except for taxes based on Oracle's income. Fees for Services listed in an order are exclusive of taxes. If You are a tax exempt entity, You must provide the applicable tax certificate of exemption with Your order. Reimbursement of expenses related to providing any Professional Services, if any, will be addressed in the relevant ordering document and/or statement of work.

8.2 You understand that You may receive multiple invoices for the Services You ordered. Invoices will be submitted to You pursuant to Oracle's Invoicing Standards Policy, which may be accessed at http://oracle.com/contracts.

8.3 You agree and acknowledge that You have not relied on the future availability of any Services, programs or updates in entering into the payment obligations in Your order; however, the preceding does not relieve Oracle of its obligation during the Services Period to deliver Services that You have ordered per the terms of this Agreement.

9. SERVICES PERIOD; END OF SERVICES

9.1 Services provided under this Agreement shall be provided for the Services Period defined in Your order, unless earlier suspended or terminated in accordance with this Agreement or the order. Even though You order Cloud Services that are designated in the Service Specifications or Your Order as Auto Renew, such services will NOT automatically renew. In order to renew, You must provide Oracle with written notice no later than thirty (30) days prior to the end of the applicable Services Period of Your intent to renew and You must execute a contract modification evidencing such renewal. The preceding sentence shall not apply if Oracle provides You with written notice no later than ninety (90) days prior to the end of the applicable Services Period of its intention not to renew such Cloud Services.

9.2 Upon the end of the Services, You no longer have rights to access or use the Services, including the associated Oracle Programs and Services Environments; however for a period of up to 60 days after the end of the applicable Services Period, Oracle will make available Your Content and Your Applications then in the Services Environment for the purpose of retrieval by You. At the end of such 60 day period, and except as may be required by law, Oracle will delete or otherwise render inaccessible any of Your Content and Your Applications that remain in the Services Environment.

9.3 Oracle may temporarily suspend Your password, account, and access to or use of the Services if You or Your Users violate any provision within the 'Rights Granted', 'Ownership and Restrictions', 'Fees and Taxes', 'Use of the Services', or 'Export' sections of this Agreement, or if in Oracle's reasonable judgment, the Services or any component thereof are about to suffer a significant threat to security or functionality. Oracle will provide advance notice to You of any such suspension in Oracle's reasonable discretion based on the nature of the circumstances giving rise to the suspension. Oracle will use reasonable efforts to re-establish the affected Services promptly after Oracle determines, in its reasonable discretion, that the situation giving rise to the suspension has been cured; however, during any suspension period, Oracle will make available to You Your Content and Your Applications as existing in the Services Environment on the date of suspension. Oracle may terminate the Services under an order if any of the foregoing causes of suspension is not cured within 30 days after Oracle's initial notice thereof. Any suspension or termination by Oracle under this paragraph shall not excuse You from Your obligation to make payment(s) under this Agreement.

9.4 If either of us breaches a material term of this Agreement and fails to correct the breach within 30 days of written specification of the breach, then the breaching party is in default and the non-breaching party may terminate the order under which the breach occurred. If Oracle terminates the order as specified in the preceding sentence, You must pay within 30 days all amounts that have accrued prior to such termination, as well as all sums remaining unpaid for the Services under such order plus related taxes and expenses. Except for nonpayment of fees, the nonbreaching party may agree in its sole discretion to extend the 30 day period for so long as the breaching party continues reasonable efforts to cure the breach. You agree that if You are in default under this Agreement, You may not use those Services ordered.

9.5 You may terminate this Agreement at any time without cause by giving Oracle 30 days prior written notice of such termination. Termination of the Agreement will not affect orders that are outstanding at the time of termination. Those orders will be performed according to their terms as if this Agreement were still in full force and effect. However, those orders may not be renewed subsequent to termination of this Agreement.

9.6 If You have used an Oracle Financing Division contract to pay for the fees due under an order and You are in default under that contract, You may not use the Services that are subject to such contract.

9.7 Provisions that survive termination or expiration of this Agreement are those relating to limitation of liability, indemnification, payment and others which by their nature are intended to survive.

10. NONDISCLOSURE

10.1 By virtue of this Agreement, the parties may have access to information that is confidential to one another ("Confidential Information"). We each agree to disclose only information that is required for the performance of obligations under this Agreement. To the extent permitted by law, Confidential information shall be limited Your Content and Your Applications residing in the Services Environment, and all information clearly identified as confidential at the time of disclosure.

10.2 A party's Confidential Information shall not include information that: (a) is or becomes a part of the public domain through no act or omission of the other party; (b) was in the other party's lawful possession prior to the disclosure and had not been obtained by the other party either directly or indirectly from the disclosing party; (c) is lawfully disclosed to the other party by a third party without restriction on the disclosure; or (d) is independently developed by the other party.

10.3 Subject to applicable law, we each agree not to disclose each other's Confidential Information to any third party other than as set forth in the following sentence for a period of three years from the date of the disclosing party's disclosure of the Confidential Information to the receiving party; however, Oracle will hold Your Confidential Information that resides within the Services Environment in confidence for as long as such information resides in the Services Environment. We each may disclose Confidential Information only to those employees, agents or subcontractors who are required to protect it against unauthorized disclosure in a manner no less protective than required under this Agreement. Oracle will protect the confidentiality of Your Content or Your Applications residing in the Services Environment in accordance with the Oracle security practices defined as part of the Service Specifications applicable to Your order. In addition, Your Personal Data will be treated in accordance with the terms of Section 11 below. Nothing shall prevent either party from disclosing the terms or pricing under this Agreement or orders placed under this Agreement in any legal proceeding arising from or in connection with this Agreement or from disclosing the Confidential Information to a governmental entity as required by law.

The parties acknowledge and agree that You and this Agreement are subject to applicable freedom of information or open records law. Should You receive a request under such law for Oracle's Confidential Information, You agree to give Oracle adequate prior notice of the request and before releasing Oracle's Confidential Information to a third party, in order to allow Oracle sufficient time to seek injunctive relief or other relief against such disclosure.

11. DATA PROTECTION

11.1 In performing the Services, Oracle will comply with the *Oracle Services Privacy Policy*, which is available at http://www.oracle.com/html/Services-privacy-policy.html and incorporated herein by reference. The *Oracle Services Privacy Policy* is subject to change at Oracle's discretion; however, Oracle policy changes will not result in a material reduction in the level of protection provided for Your Personal Data provided as part of Your Content during the Services Period of Your order.

11.2 Oracle's *Data Processing Agreement for Oracle Cloud Services* (the "Data Processing Agreement"), which is available at http://www.oracle.com/dataprocessingagreement and incorporated herein by reference, describes the parties' respective roles for the processing and control of Personal Data that You provide to Oracle as part of the Cloud Services. Oracle will act as a data processor, and will act on Your instruction concerning the treatment of Your Personal Data residing in the Services Environment, as specified in this Agreement, the Data Processing Agreement and the applicable order. You agree to provide any notices and obtain any consents related to Your use of the Services and Oracle's provision of the Services, including those related to the collection, use, processing, transfer and disclosure of Personal Data.

11.3 The Service Specifications applicable to Your order define the administrative, physical, technical and other safeguards applied to Your Content residing in the Services Environment, and describe other aspects of system management applicable to the Services. You are responsible for any security vulnerabilities, and the consequences of such vulnerabilities, arising from Your Content and Your Applications, including any viruses, Trojan horses, worms or other programming routines contained in Your Content or Your Applications that could limit or harm the functionality of a computer or that could damage, intercept or expropriate data. You may disclose or transfer, or instruct Oracle to disclose or transfer in writing, Your Content or Your Applications to a third party, and upon such disclosure or transfer Oracle is no longer responsible for the security or confidentiality of such content and applications outside of Oracle.

11.4 You may not provide Oracle access to health, payment card or similarly sensitive personal information that imposes specific data security obligations for the processing of such data unless specified in Your order. If available, You may purchase services from Oracle (e.g., Oracle Payment Card Industry Compliance Services, Oracle HIPAA Security Services, Oracle Federal Security Services, etc.) designed to address particular data protection requirements applicable to Your business or Your Content.

12. WARRANTIES, DISCLAIMERS AND EXCLUSIVE REMEDIES

12.1 Oracle warrants that it will perform (i) Cloud Services in all material respects as described in the Service Specifications, and (ii) Professional Services in a professional manner in accordance with the Service Specifications. If the Services provided to You were not performed as warranted, You must promptly provide written notice to Oracle that describes the deficiency in the Services (including, as applicable, the service request number notifying Oracle of the deficiency in the Services).

12.2 ORACLE DOES NOT GUARANTEE THAT (A) THE SERVICES WILL BE PERFORMED ERROR-FREE OR UNINTERRUPTED, OR THAT ORACLE WILL CORRECT ALL SERVICES ERRORS, (B) THE SERVICES WILL OPERATE IN COMBINATION WITH YOUR CONTENT OR YOUR APPLICATIONS, OR WITH ANY OTHER HARDWARE, SOFTWARE, SYSTEMS, SERVICES OR DATA NOT PROVIDED BY ORACLE, AND (C) THE SERVICES WILL MEET YOUR REQUIREMENTS, SPECIFICATIONS OR EXPECTATIONS. YOU ACKNOWLEDGE THAT ORACLE DOES NOT CONTROL THE TRANSFER OF DATA OVER COMMUNICATIONS FACILITIES, INCLUDING THE INTERNET, AND THAT THE SERVICES MAY BE SUBJECT TO LIMITATIONS, DELAYS, AND OTHER PROBLEMS INHERENT IN THE USE OF SUCH COMMUNICATIONS FACILITIES. ORACLE IS NOT RESPONSIBLE FOR ANY DELAYS, DELIVERY FAILURES, OR OTHER DAMAGE RESULTING FROM SUCH PROBLEMS. ORACLE IS NOT RESPONSIBLE FOR ANY ISSUES RELATED TO THE PERFORMANCE, OPERATION OR SECURITY OF THE SERVICES THAT ARISE FROM YOUR CONTENT, YOUR APPLICATIONS OR THIRD PARTY CONTENT.

12.3 FOR ANY BREACH OF THE SERVICES WARRANTY, YOUR EXCLUSIVE REMEDY AND ORACLE'S ENTIRE LIABILITY SHALL BE THE CORRECTION OF THE DEFICIENT SERVICES THAT CAUSED THE BREACH OF WARRANTY, OR, IF ORACLE CANNOT SUBSTANTIALLY CORRECT THE DEFICIENCY IN A COMMERCIALLY REASONABLE MANNER, YOU MAY END THE DEFICIENT SERVICES AND ORACLE WILL REFUND TO YOU THE FEES PAID FOR THE DEFICIENT SERVICES FOR THE PERIOD OF TIME DURING WHICH THE SERVICES WERE DEFICIENT.

12.4 TO THE EXTENT NOT PROHIBITED BY LAW, THESE WARRANTIES ARE EXCLUSIVE AND THERE ARE NO OTHER EXPRESS OR IMPLIED WARRANTIES OR CONDITIONS INCLUDING FOR SOFTWARE, HARDWARE, SYSTEMS, NETWORKS OR ENVIRONMENTS OR FOR MERCHANTABILITY, SATISFACTORY QUALITY AND FITNESS FOR A PARTICULAR PURPOSE.

13. LIMITATION OF LIABILITY

NEITHER PARTY SHALL BE LIABLE FOR ANY INDIRECT, INCIDENTAL, SPECIAL, PUNITIVE, OR CONSEQUENTIAL DAMAGES, OR ANY LOSS OF REVENUE OR PROFITS (EXCLUDING FEES UNDER THIS AGREEMENT), DATA, OR DATA USE. ORACLE'S AGGREGATE LIABILITY FOR ALL DAMAGES ARISING OUT OF OR RELATED TO THIS AGREEMENT OR YOUR ORDER, WHETHER IN CONTRACT OR TORT, OR OTHERWISE, SHALL BE LIMITED TO THE TOTAL AMOUNTS ACTUALLY PAID TO ORACLE FOR THE SERVICES UNDER THE ORDER GIVING RISE TO THE LIABILITY IN THE TWELVE (12) MONTH PERIOD IMMEDIATELY PRECEDING THE EVENT GIVING RISE TO SUCH LIABILITY LESS ANY REFUNDS OR CREDITS RECEIVED BY YOU FROM ORACLE UNDER SUCH ORDER.

14. INDEMNIFICATION

14.1 Subject to the terms of this Section 14 (Indemnification), if a third party makes a claim against either You or Oracle ("Recipient" which may refer to You or Oracle depending upon which party received the Material), that any information, design, specification, instruction, software, service, data, hardware, or material (collectively, "Material") furnished by either You or Oracle ("Provider" which may refer to You or Oracle depending on which party provided the Material) and used by the Recipient infringes the third party's intellectual property rights, the Provider, at the Provider's sole cost and expense, will, to the extent not prohibited by law, defend the Recipient against the claim and indemnify the Recipient from the damages, liabilities, costs and expenses awarded by the court to the third party claiming infringement or the settlement agreed to by the Provider, if the Recipient does the following:

a. notifies the Provider promptly in writing, not later than 30 days after the Recipient receives notice of the claim (or sooner if required by applicable law);
b. gives the Provider sole control of the defense and any settlement negotiations, to the extent permitted by law; and
c. gives the Provider the information, authority and assistance the Provider needs to defend against or settle the claim.

14.2 If the Provider believes or it is determined that any of the Material may have violated a third party's intellectual property rights, the Provider may choose to either modify the Material to be non-infringing (while substantially preserving its utility or functionality) or obtain a license to allow for continued use, or if these alternatives are not commercially reasonable, the Provider may end the license for, and require return of, the applicable Material and refund any unused, prepaid fees the Recipient may have paid to the other party for such

Material. If such return materially affects Oracle's ability to meet its obligations under the relevant order, then Oracle may, at its option and upon 30 days prior written notice, terminate the order. If such Material is third party technology and the terms of the third party license do not allow Oracle to terminate the license, then Oracle may, upon 30 days prior written notice, end the Services associated with such Material and refund to You any unused, prepaid fees for such Services.

14.3 The Provider will not indemnify the Recipient if the Recipient (a) alters the Material or uses it outside the scope of use identified in the Provider's user or program documentation or Service Specifications, (b) uses a version of the Material which has been superseded, if the infringement claim could have been avoided by using an unaltered current version of the Material which was made available to the Recipient, or (c) continues to use the applicable Material after the end of the license to use that Material. The Provider will not indemnify the Recipient to the extent that an infringement claim is based upon any information, design, specification, instruction, software, service, data, hardware or material not furnished by the Provider. Oracle will not indemnify You for any portion of an infringement claim that is based upon the combination of any Material with any products or Services not provided by Oracle. Oracle will not indemnify You to the extent that an infringement claim is based on Third Party Content or any Material from a third party portal or other external source that is accessible or made available to You within or by the Services (e.g., a social media post from a third party blog or forum, a third party Web page accessed via a hyperlink, marketing data from third party data providers, etc. Oracle will not indemnify You for infringement caused by Your actions against any third party if the Services as delivered to You and used in accordance with the terms of this Agreement would not otherwise infringe any third party intellectual property rights. Oracle will not indemnify You for any intellectual property infringement claim(s) known to You at the time Services rights are obtained.

14.4 This Section 14 provides the parties' exclusive remedy for any infringement claims or damages.

15. THIRD PARTY WEB SITES, CONTENT, PRODUCTS AND SERVICES

15.1 The Services may enable You to link to, transmit Your Content to, or otherwise access, other Web sites, platforms, content, products, services, and information of third parties. Oracle does not control and is not responsible for such Web sites or platforms or any such content , products, services and information accessible from or provided through the Services, and You bear all risks associated with access to and use of such Web sites and third party content, products, services and information.

15.2 Any Third Party Content made accessible by Oracle is provided on an "as-is" and "as available" basis without any warranty of any kind. Third Party Content may be indecent, offensive, inaccurate, infringing or otherwise objectionable or unlawful, and You acknowledge that Oracle is not responsible for and under no obligation to control, monitor or correct Third Party Content; however, Oracle reserves the right to take remedial action if any such content violates applicable restrictions under Section 6.2 of this Agreement, including the removal of, or disablement of access to, such content. Oracle disclaims all liabilities arising from or related to Third Party Content.

15.3 You acknowledge that: (i) the nature, type, quality and availability of Third Party Content may change at any time during the Services Period, and (ii) features of the Services that interoperate with third parties such as Facebook™, YouTube™ and Twitter™, etc. (each, a "Third Party Service"), depend on the continuing availability of such third parties' respective application programming interfaces (APIs) for use with the Services. Oracle may update, change or modify the Services under this Agreement as a result of a change in, or unavailability of, such Third Party Content, Third Party Services or APIs. If any third party ceases to make its Third Party Content or APIs available on reasonable terms for the Services, as determined by Oracle in its sole discretion, Oracle may cease providing access to the affected Third Party Content or Third Party Services without any liability to You. Any changes to Third Party Content, Third Party Services or APIs, including their availability or unavailability, during the Services Period does not affect Your obligations under this Agreement or the applicable order, and You will not be entitled to any refund, credit or other compensation due to any such changes.

15.4 Any Third Party Content that You store in Your Services Environment will count towards any storage or other allotments applicable to the Cloud Services that You ordered.

16. SERVICES TOOLS AND ANCILLARY SOFTWARE

16.1 Oracle may use tools, scripts, software, and utilities (collectively, the "Tools") to monitor and administer the Services and to help resolve Your Oracle service requests. The Tools will not collect or store any of Your Content or Your Applications residing in the Services Environment, except as necessary to provide the Services or troubleshoot service requests or other problems in the Services. Information collected by the Tools (excluding

Your Content and Your Applications) may also be used to assist in managing Oracle's product and service portfolio, to help Oracle address deficiencies in its product and service offerings, and for license and Services management.

16.2 Oracle may provide You with on-line access to download certain Ancillary Software for use with the Services. If Oracle licenses Ancillary Software to You and does not specify separate terms for such Ancillary Software, then, subject to Your payment obligations, (i) You have the non-exclusive, non-assignable, worldwide limited right to use such Ancillary Software solely to facilitate Your access to, operation of, and/or use of the Services Environment, subject to the terms of this Agreement and Your order, including the Services Specifications, (ii) Oracle will maintain such Ancillary Software as part of the Cloud Services, and (iii) Your right to use such Ancillary Software will terminate upon the earlier of Oracle's notice (which may be through posting on https://support.oracle.com or such other URL designated by Oracle) or the end of the Cloud Services associated with the Ancillary Software. If Ancillary Software is licensed to You under separate third party license terms, then Your use of such software is subject solely to such separate terms.

17. SERVICE ANALYSES

Oracle may (i) compile statistical and other information related to the performance, operation and use of the Services, and (ii) use data from the Services Environment in aggregated form for security and operations management, to create statistical analyses, and for research and development purposes (clauses i and ii are collectively referred to as "Service Analyses"). Oracle may make Service Analyses publicly available; however, Service Analyses will not incorporate Your Content or Confidential Information in a form that could serve to identify You or any individual, and Service Analyses do not constitute Personal Data. Oracle retains all intellectual property rights in Service Analyses.

18. EXPORT

18.1 Export laws and regulations of the United States and any other relevant local export laws and regulations apply to the Services. You agree that such export laws govern Your use of the Services (including technical data) and any Services deliverables provided under this Agreement, and You agree to comply with all such export laws and regulations (including "deemed export" and "deemed re-export" regulations). You agree that no data, information, software programs and/or materials resulting from Services (or direct product thereof) will be exported, directly or indirectly, in violation of these laws, or will be used for any purpose prohibited by these laws including, without limitation, nuclear, chemical, or biological weapons proliferation, or development of missile technology.

18.2 You acknowledge that the Cloud Services are designed with capabilities for You and Your Users to access the Services Environment without regard to geographic location and to transfer or otherwise move Your Content and Your Applications between the Services Environment and other locations such as User workstations. You are solely responsible for the authorization and management of User accounts, as well as export control and geographic transfer of Your Content and Your Applications.

19. FORCE MAJEURE

Neither of us shall be responsible for failure or delay of performance if caused by: an act of war, hostility, or sabotage; act of God; pandemic; electrical, internet, or telecommunication outage that is not caused by the obligated party; government restrictions (including the denial or cancelation of any export, import or other license); or other event outside the reasonable control of the obligated party. We both will use reasonable efforts to mitigate the effect of a force majeure event. If such event continues for more than 30 days, either of us may cancel unperformed Services and affected orders upon written notice. This Section does not excuse either party's obligation to take reasonable steps to follow its normal disaster recovery procedures or Your obligation to pay for the Services.

20. NOTICE

20.1 Any notice required under this Agreement shall be provided to the other party in writing. If You have a dispute with Oracle or if You wish to provide a notice under the Indemnification Section of this Agreement, or if You become subject to insolvency or other similar legal proceedings, You will promptly send written notice to: Oracle America, Inc., 500 Oracle Parkway, Redwood Shores, CA 94065. Attention: General Counsel, Legal Department.

20.2 To request a termination of Services in accordance with this Agreement, You must submit a service request to Oracle at the address specified in Your order or the Service Specifications.

20.3 Oracle may give notices applicable to Oracle's Cloud Services customer base by means of a general notice on the Oracle portal for the Cloud Services, and notices specific to You by electronic mail to Your e-mail address on record in Oracle's account information or by written communication sent by first class mail or pre-paid post to Your address on record in Oracle's account information.

21. ASSIGNMENT

You may not assign this Agreement or give or transfer the Services (including the Oracle Programs) or an interest in them to another individual or entity. If You grant a security interest in any portion of the Services, the secured party has no right to use or transfer the Services or any deliverables, and if You decide to finance Your acquisition of the Services, You will follow Oracle's policies regarding financing which are at http://oracle.com/contracts.

22. OTHER

22.1 Oracle is an independent contractor and we agree that no partnership, joint venture, or agency relationship exists between us. We are each responsible for paying our own employees, including employment related taxes and insurance. You understand that Oracle's business partners and other third parties, including any third parties with which Oracle has an integration or that are retained by You to provide consulting or implementation services or applications that interact with the Cloud Services, are independent of Oracle and are not Oracle's agents. Oracle is not liable for, bound by, or responsible for any problems with the Services, Your Content or Your Applications arising due to any acts of any such business partner or third party, unless the business partner or third party is providing Services as an Oracle subcontractor on an engagement ordered under this Agreement and, if so, then only to the same extent as Oracle would be responsible for Oracle resources under this Agreement.

22.2 If any term of this Agreement is found to be invalid or unenforceable, the remaining provisions will remain effective and such term shall be replaced with another term consistent with the purpose and intent of this Agreement.

22.3 Except for actions for nonpayment or breach of Oracle's proprietary rights, no action, regardless of form, arising out of or relating to this Agreement may be brought by either party more than two years after the cause of action has accrued.

22.4 Oracle Programs and Services are not designed for or specifically intended for use in nuclear facilities or other hazardous applications. You agree that it is Your responsibility to ensure safe use of Oracle Programs and Services in such applications.

22.5 You shall obtain at Your sole expense any rights and consents from third parties necessary for Your Content, Your Applications, and Third Party Content, as well as other vendor's products provided by You that You use with the Services, including such rights and consents as necessary for Oracle to perform the Services under this Agreement.

22.6 You agree to provide Oracle with all information, access and full good faith cooperation reasonably necessary to enable Oracle to provide the Services and You will perform the actions identified in Your order as Your responsibilities.

22.7 You remain solely responsible for Your regulatory compliance in connection with Your use of the Services. You are responsible for making Oracle aware of any technical requirements that result from Your regulatory obligations prior to entering into an order governed by this Agreement. Oracle will cooperate with Your efforts to determine whether use of the standard Oracle Services offering is consistent with those requirements. Additional fees may apply to any additional work performed by Oracle or changes to the Services.

22.8 Oracle may audit Your use of the Services (e.g., through use of software tools) to assess whether Your use of the Services is in accordance with Your order and the terms of this Agreement. You agree to cooperate with Oracle's audit and provide reasonable assistance and access to information. Any such audit shall not unreasonably interfere with Your normal business operations. You agree to pay within 30 days of written notification any fees applicable to Your use of the Services in excess of Your rights. If You do not pay, Oracle can end Your Services and/or Your order. You agree that Oracle shall not be responsible for any of Your costs incurred in cooperating with the audit.

22.9 The purchase of Cloud Services, Professional Services, or other service offerings, programs or products are all separate offers and separate from any other order. You understand that You may purchase Cloud Services, Professional Services, or other service offerings, programs or products independently of any other order. Your obligation to pay under any order is not contingent on performance of any other service offerings or delivery of programs or products.

23. ENTIRE AGREEMENT

23.1 You agree that this Agreement and the information which is incorporated into this Agreement by written reference (including reference to information contained in a URL or referenced policy), together with the applicable order, is the complete agreement for the Services ordered by You and supersedes all prior or contemporaneous agreements or representations, written or oral, regarding such Services.

23.2 It is expressly agreed that the terms of this Agreement and any Oracle order shall supersede the terms in any purchase order, procurement internet portal, or other similar non-Oracle document and no terms included in any such purchase order, portal, or other non-Oracle document shall apply to the Services ordered. In the event of any inconsistencies between the terms of an order and the Agreement, the order shall take precedence; however, unless expressly stated otherwise in an order, the terms of the Data Processing Agreement shall take precedence over any inconsistent terms in an order. Except as otherwise permitted in Section 5 (Service Specifications), Section 11 (Data Protection) and Section 15 (Third Party Web Sites) with respect to the Services, this Agreement and orders hereunder may not be modified and the rights and restrictions may not be altered or waived except in a writing signed or accepted online through the Oracle Store by authorized representatives of You and of Oracle. No third party beneficiary relationships are created by this Agreement.

24. CLOUD SERVICES EFFECTIVE DATE

The Effective Date of this Cloud Services Agreement is ____________________. (DATE TO BE COMPLETED BY ORACLE)

Customer Name	Boise State University	**Oracle America, Inc.**	
Signature	Stacy Pearson	**Signature**	
Name	Stacy Pearson	**Name**	
Title	VPFA	**Title**	
Signature Date	2/9/2015	**Signature Date**	
Agreement No	US-CSA-QT 5341943 *[to be completed by Oracle]*		

ORACLE **AMENDMENT ONE**

Agreement Information

This Amendment amends the Oracle Public Sector Agreement for Cloud Services US-CSA-QT5341943, dated______________________, and all amendments and addenda thereto (the "Agreement") between You and Oracle America, Inc. ("Oracle").

The parties agree to amend the Agreement as follows:

1. **Section 3. RIGHTS GRANTED**

   The text of Section 3.2 is deleted and is replaced with the following:

   "You do not acquire under this Agreement any right or license to use the Services, including the Oracle Programs and Services Environment, in excess of the scope and/or duration of the Services stated in Your order. Subject to Section 9.2 hereof, upon the end of the Services ordered, Your right to access and use the Services will terminate. Oracle does not acquire under this Agreement any right or license to Your Content and Your Applications in excess of the scope and/or duration of the Services that is appropriate for Your Order. Subject to Section 9.2 hereof, upon the end of the Services ordered, Oracle's right under Your Order to access Your Content and Your Applications will terminate."

2. **Section 3. RIGHTS GRANTED**

   The text of Section 3.3 is deleted and is replaced with the following:

   "To enable Oracle to provide You and Your Users with the Services, You grant Oracle the right to use, process and transmit, in accordance with this Agreement and Your order and only to the extent necessary to provide the Services in accordance with this Agreement and Your Order, Your Content and Your Applications for the duration of the Services Period plus any additional post-termination period during which Oracle provides You with access to retrieve an export file of Your Content and Your Applications. If Your Applications include third party programs, You acknowledge that Oracle may allow providers of those third party programs to access the Services Environment, including Your Content and Your Applications, solely to the extent required for the interoperation of such third party programs with the Services. Oracle will not be responsible for any use, disclosure, modification or deletion of Your Content or Your Applications resulting from any such access by third party program providers or for the interoperability of such third party programs with the Services. The third party owner, author or provider of such third party program retains all ownership and intellectual property rights in and to that content."

3. **Section 4. OWNERSHIP AND RESTRICTIONS**

   The first sentence of Section 4.1 is deleted and is replaced with the following:

   "You retain all ownership and intellectual property rights in and to Your Content and Your Applications and no implied license is granted to use Your Content and Your Applications following termination of this Agreement."

4. **Section 6. USE OF THE SERVICES**

The third sentence in Section 6.1 is deleted and is replaced with the following:

"To the extent permitted by applicable law and subject to the Idaho Tort Claims Act, Idaho Code Sections 6-901 through 6-929 (the "Idaho Tort Claims Act"), You are responsible for all activities that occur under Your and Your Users' usernames, passwords or accounts as a result of Your or Your Users' access to the Services, and agree to notify Oracle immediately of any unauthorized use."

5. **Section 6. USE OF THE SERVICES**

The last sentence of Section 6.2 is deleted and is replaced with the following:

"To the extent permitted by applicable law and subject to the Idaho Tort Claims Act, You agree to defend and indemnify Oracle against any claim arising out of a violation of Your obligations under this section."

6. **Section 8. FEES AND TAXES**

The first sentence of 8.2 is deleted and is replaced with the following:

"You understand that You may receive multiple invoices for the Services You ordered (but such invoices will not be charging You more than once for the applicable ordered Service)."

7. **Section 9. SERVICES PERIOD; END OF SERVICES**

The second sentence of Section 9.3 is deleted and is replaced with the following:

"Oracle will provide advance notice to You of any such suspension in Oracle's reasonable discretion based on the nature of the circumstances giving rise to the suspension, provided Oracle will endeavor to provide such notice within seven business days prior to such suspension."

8. **Section 9. SERVICES PERIOD; END OF SERVICES**

The second sentence of Section 9.4 is deleted and is replaced with the following:

"If Oracle terminates the order as specified in the preceding sentence, You must pay within 30 days all amounts that have accrued prior to such termination, as well as all sums remaining unpaid for the Services delivered under such order plus related taxes and expenses."

9. **Section 10. NONDISCLOSURE**

The last sentence of Section 10.3 is deleted and is replaced with the following:

"Nothing shall prevent either party from disclosing the terms or pricing under this Agreement or orders placed under this Agreement in any legal proceeding arising from or in connection with this Agreement or from disclosing any Confidential Information to a governmental entity or as otherwise required by law, provided that the disclosing party shall provide written notice of such disclosure as soon as possible to the extent allowable by law or such governmental entity to the non-disclosing party."

10. Section 13. LIMITATION OF LIABILITY

The text of Section 13 is deleted and is replaced with the following:

"NEITHER PARTY SHALL BE LIABLE FOR ANY INDIRECT, INCIDENTAL, SPECIAL, PUNITIVE, OR CONSEQUENTIAL DAMAGES, OR ANY LOSS OF REVENUE OR PROFITS (EXCLUDING FEES UNDER THIS AGREEMENT), DATA, OR DATA USE. ORACLE'S AGGREGATE LIABILITY FOR ALL DAMAGES ARISING OUT OF OR RELATED TO THIS AGREEMENT OR YOUR ORDER, WHETHER IN CONTRACT OR TORT, OR OTHERWISE, SHALL BE LIMITED TO THE TOTAL AMOUNTS ACTUALLY PAID TO ORACLE FOR THE SERVICES UNDER THE ORDER GIVING RISE TO THE LIABILITY IN THE TWELVE (12) MONTH PERIOD IMMEDIATELY PRECEDING THE EVENT GIVING RISE TO SUCH LIABILITY LESS ANY REFUNDS OR CREDITS RECEIVED BY YOU FROM ORACLE UNDER SUCH ORDER, PROVIDED, HOWEVER, THIS LIMITATION SHALL NOT APPLY TO DAMAGES OR LIABILITIES ARISING FROM THE ~~GROSSLY NEGLIGENT OR~~ WILLFUL MISCONDUCT OF ORACLE IN PERFORMING ITS OBLIGATIONS UNDER THIS AGREEMENT."

11. Section 14. INDEMNIFICATION

The text of Section 14.1 is deleted and is replaced with the following:

"Subject to the terms of this Section 14 (Indemnification), if a third party makes a claim against either You or Oracle ("Recipient" which may refer to You or Oracle depending upon which party received the Material), that any information, design, specification, instruction, software, service, data, hardware, or material (collectively, "Material") furnished by either You or Oracle ("Provider" which may refer to You or Oracle depending on which party provided the Material) and used by the Recipient infringes the third party's intellectual property rights, the Provider, at the Provider's sole cost and expense, will, to the extent permitted and not prohibited by law and with regard to You subject to the Idaho Tort Claims Act, defend the Recipient against the claim and indemnify the Recipient from the damages, liabilities, costs and expenses awarded by the court to the third party claiming infringement or the settlement agreed to by the Provider, if the Recipient does the following:

a. notifies the Provider promptly in writing, not later than 30 days after the Recipient receives notice of the claim (or sooner if required by applicable law);
b. gives the Provider sole control of the defense and any settlement negotiations, to the extent permitted by law; and
c. gives the Provider the information, authority and assistance the Provider needs to defend against or settle the claim."

12. Section 14. INDEMNIFICATION

The following is inserted as a new subsection in Section 14:

"14.5 Nothing in this Agreement shall be deemed to constitute a waiver by either party of any privilege, protection, or immunity otherwise afforded it under state or federal law. Except as necessary to enforce the terms hereof, nothing in this Agreement shall be deemed a waiver of Your sovereign immunity, which is hereby expressly retained."

13. Section 18. EXPORT

The second sentence of Section 18.1 is deleted and is replaced with the following:

"You agree that such export laws govern Your use of the Services (including technical data) and any Services deliverables provided under this Agreement, and You agree to comply with all such export laws and regulations (including "deemed export" and "deemed re-export" regulations) relating to Your use of the Services."

14. Section 19. FORCE MAJEURE

The first sentence of Section 19 is deleted and is replaced with the following:

"Neither of us shall be responsible for failure or delay of performance if caused by: an act of war, hostility, or sabotage; act of God; pandemic; extended electrical, internet, or telecommunication outage that is not caused by the obligated party nor within the reasonable control of the obligated party; government restrictions (including the denial or cancelation of any export, import or other license); or other event outside the reasonable control of the obligated party."

15. Section 22. OTHER

The third sentence of Section 22.8 is deleted and is replaced with the following:

"Any such audit shall not unreasonably interfere with Your normal business operations and must in all respects comply with applicable laws regarding privacy and confidentiality of Your data or other applicable laws."

16. Section 22. OTHER

The following is added as a new subsection in Section 22:

"22.10 Governing Law and Jurisdiction. This Agreement shall be construed in accordance with and governed by the laws of the State of Idaho without regard to conflicts of law. Any action to enforce the provisions of this Agreement shall be brought in courts located in Idaho. Each party hereby consents to service and jurisdiction in such courts."

17. Section 22. OTHER

The following is added as a new subsection in Section 22:

"22.11 Sufficient Appropriation by Legislature Required**.** It is understood and agreed that You are a governmental entity, and this Agreement shall in no way or manner be construed so as to bind or obligate the State of Idaho beyond the term of any particular appropriation of funds by the State legislature as may exist from time to time. You reserve the right to terminate this Agreement and any Order in place, in whole or in part if, in Your judgment, the legislature of the State of Idaho fails, neglects or refuses to appropriate sufficient funds as may be required for You to continue such Agreement and Order, or requires any return or "give-back" of funds, or if the Executive Branch mandates any cuts or holdbacks in spending. All affected future rights and liabilities of both Parties hereunder and under any Order Documents shall thereupon cease within thirty (30) days after the notice to Oracle."

18. Section 22. OTHER

The following is added as a new subsection in Section 22:

"22.12 Officials, Agents and Employees of You Not Personally Liable**.** It is agreed by and between the Parties that in no event shall any official, officer, employee or agent of the State of Idaho or of the Boise State University be in any way liable or responsible for any covenant or agreement contained in this Agreement, express or implied, nor for any statement, representation or warranty made in or in any way connected with this Agreement. In particular, and without limitation of the foregoing, no full-time or part-time agent or employee of the State of Idaho, including Boise State University, shall have any personal liability or responsibility under this Agreement, and the sole responsibility and liability for the performance of this Agreement and all of the provisions and covenants contained in this Agreement shall rest in and be vested with Boise State University."

Subject to the modifications herein, the Agreement shall remain in full force and effect.

The Effective Date of this amendment is _____________. (to be completed by Oracle)

Boise State University		Oracle America, Inc.	
Signature	Stacy Pearson	Signature	
Name	Stacy Pearson	Name	
Title	VPFA	Title	
Signature Date	2/9/2015	Signature Date	
Agreement Number	US-CSA-QT5341943		

CONTRACTS ORACLE

US-CSA-QT5341943_CSAAmendment1_v2_ BoiseStateUniv_04-Feb-2015_AA (EchoSign) Page 5 of 5

IDAHO STATE UNIVERSITY

SUBJECT

Lease amendment: land use (parking area) swap between Idaho State University (ISU) and Idaho State University Federal Credit Union (ISU FCU)

APPLICABLE STATUTE, RULE, OR POLICY

Idaho State Board of Education Governing Policies & Procedures, Section V.I.5.b.i.
Section 58-335, Idaho Code

BACKGROUND/DISCUSSION

In 1977, ISU acquired ten lots of land which were subsequently used as parking lots. ISU and ISU FCU entered into a lease agreement in 1989 that allowed ISU FCU to build a credit union building on a portion of the ISU parking lot. Because the parking area adjacent to the credit union building continued to be used for parking by ISU, the credit union purchased land across the street (E. Lovejoy St.) for use as dedicated parking for ISU FCU's staff and customers. The result was that ISU retained parking slots next to the credit union, while the credit union's parking slots were displaced from their building, closer to the ISU campus.

ISU FCU has approached ISU to discuss swapping the use of an equal number of parking spaces so that ISU FCU staff/customers could park closer to the credit union building, with no inconvenience to ISU students/staff who would have access to the former ISU FCU parking area. An overhead map of the proposed parking lot area swap is provided in Attachment 2. Ownership of the land will not be changed (ISU continues to own the property). The amended lease which makes the parking area swap possible requires State Board of Education (Board) approval because the term of the lease exceeds five years (lease extends through January 2039).

IMPACT

Approval of the request will allow ISU and ISU FCU to swap the use of the affected parking areas, and will be of mutual benefit to both entities. ISU faculty and students will be able to park closer to ISU's main campus, and the credit union will be able to provide better customer service to its clients, including ISU stakeholders.

ATTACHMENTS

Attachment 1 – Lease Amendment	Page 3
Attachment 2 – Map of Area	Page 5

STAFF COMMENTS AND RECOMMENDATIONS

The revised parking lot assignments made possible by the proposed lease amendment make sense for both parties. ISU is coordinating this action with the Division of Public Works statewide leasing manager. Staff recommends approval.

BOARD ACTION

I move to approve the request by Idaho State University to execute an amended lease agreement with the Idaho State University Federal Credit Union in accordance with the terms provided in Attachment 1.

Moved by __________ Seconded by __________ Carried Yes _____ No _____

ATTACHMENT 1

AMENDMENT TO LEASE AGREEMENT BETWEEN IDAHO STATE UNIVERSITY AND ISU FEDERAL CREDIT UNION

This AMENDMENT TO LEASE AGREEMENT is made by and between Idaho State University, hereinafter called "LESSOR" and Idaho State University Federal Credit Union, hereinafter called "LESSEE".

WHEREAS, LESSOR AND LESSEE previous entered into a Lease Agreement on January 25, 1989 wherein LESSOR agreed to lease to LESSEE certain real property for a period of fifty (50) years for the purpose of conducting business as a federal credit union;

WHEREAS, LESSOR is the owner of certain real property located adjacent to the property which is the subject of the Lease Agreement; and

WHEREAS, LESSEE is the owner of certain real property located on the corner of E Lovejoy Street and S 9th Avenue; and

WHEREAS, LESSOR AND LESSEE desire to exchange their properties for the duration of the lease term under the terms and conditions set forth herein; and

WHEREASE, the Idaho State Board of Education has given its approval for LESSOR to amend the Lease Agreement to exchange the properties that are the subject of this Amendment to Lease Agreement.

NOW THEREFORE, in consideration of the mutual covenants and promises contained in the original Lease Agreement and herein, the parties agree as follows:

1. PROPERTIES SUBJECT TO THE EXCHANGE. The following described real property of LESSOR shall be leased to LESSEE:

   S15' X E70' LOT 4; E70' LOTS 5 THRU 8; N15' X E70' LOT 9 BLOCK 183 POCATELLO TOWNSITE
   The following described real property of LESSEE shall be leased to LESSOR:

   E80' LOTS 1 & 2 BLOCK 184 POCATELLO TOWNSITE

2. USE. The parties shall use these properties as parking spaces. LESSOR shall place signage on both properties to clearly indicate usage and LESSEE shall approve all signage. All parking spaces (8), shall be marked as credit union member parking, utilizing the LESSEE's existing signage from the current, existing eight (8) parking stalls. LESSEE shall provide its own employee parking permits and will provide the LESSOR with the identity of the valid parking permits. Finally, LESSOR shall patrol the reserved parking stalls and shall ticket parking violators, where and when applicable.
3. TERM. The term of this Amendment to Lease Agreement shall be the same as that described in the original Lease Agreement. That is, this Amendment to Lease Agreement shall expire simultaneously with the expiration of the original Lease Agreement.
4. REVERSION. At the expiration of the original Lease Agreement and this Amendment to Lease Agreement, or upon the discontinuance of the use of the leased property as the ISU Federal Credit Union, whichever occurs first, said property, along with all improvements, shall revert to the LESSOR without cost.

ATTACHMENT 1

5. INCORPORATION INTO ORIGINAL LEASE AGREEMENT. This Amendment to Lease Agreement shall be incorporated into and become a part of the original Lease Agreement, subject to the terms and conditions set forth therein, being modified only to the extent expressly set forth herein.

IN WITNESS WHEREOF, the authorized representatives of the parties have executed this Agreement on this _________ day of _________________________, 2016.

LESSOR BY:

____
Cheryl Hanson, Associate Vice President, Facilities Services

LESSEE BY:

____
Manager, Idaho State University Federal Credit Union

AUTHORIZATION BY:

____
Linda S. Miller, Statewide Leasing Manager, Division of Public Works

ATTACHMENT 2

MAP OF AREA

ATTACHMENT 2

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IDAHO STATE UNIVERSITY

SUBJECT

Disposal of Idaho State University real property in McCammon, Idaho

APPLICABLE STATUTE, RULE, OR POLICY

Idaho State Board of Education Governing Policies & Procedures, Section V.I.
Sections 58-335 and 67-5722, Idaho Code

BACKGROUND/DISCUSSION

Between 1987 and 1991, Idaho State University (ISU) was gifted approximately 120 acres in McCammon, Idaho, from the Robert E. & Joan O'Neall Trust. The property was gifted in five pieces, with the last piece deeded to ISU in 1991. The property was intended to provide an ecological reserve for ISU and its interested students and faculty. Part of the property included a 6.5 acre right-of-way that provided access to the east side of the property.

In 2013 Wayne Taysom, the property's neighbor to the south, raised concerns to ISU officials about weeds that had overgrown ISU's land and were beginning to interfere with his land. ISU's facilities crews could not adequately remove the weeds because they had grown on a riverbank that was difficult to access. ISU enlisted the help of Bannock County Noxious Weed Control to mitigate the weeds for the past two years. However, the County will not be able to continue this assistance in the future.

The subject property, 10.17 acres consisting of three irregular-shape sections located east of the railroad tracks (see diagram at Tab 7 page 26), offers little to no research or economic value to ISU. Disposal of the property would obviate the need for weed control and general upkeep of this unused area.

The subject property was appraised at $6,600. ISU contacted neighboring property owners, and has received an offer of $7,000 from Mr. Taysom (who is also the only property owner with convenient access to the property).

IMPACT

Approval of the request will allow ISU to dispose of the unneeded property, avoid upkeep costs, and maintain good relations with the neighboring property owners.

ATTACHMENTS

Attachment 1 – Draft Quitclaim Deed	Page 3
Attachment 2 – Appraisal	Page 5

STAFF COMMENTS AND RECOMMENDATIONS

The proposed sale of this parcel will enable ISU to avoid upkeep costs for an unused section of property. ISU was advised that land values in the area have not changed significantly since the attached appraisal was conducted within the past two years (September 2014). The $7,000 offer (from the only local property owner with feasible access to the property) exceeds the appraised value of the property. This action would return the property to economic use. Staff recommends approval.

BOARD ACTION

I move to approve the request by Idaho State University to proceed with the sale of the subject real property in McCammon, Idaho for $7,000, and to authorize Idaho State University finance staff to sign all necessary documents to complete the sale on behalf of the Board of Trustees, as described in the documents provided.

Moved by __________ Seconded by __________ Carried Yes _____ No _____

ATTACHMENT 1

QUITCLAIM DEED

THIS QUITCLAIM DEED made this _____ day of _____, 2016, between IDAHO STATE UNIVERSITY, a state educational institution and body politic and corporate, organized and existing under the laws and constitution of the State of Idaho, herein referred to as "**Grantor**," and Wayne Taysom, whose address is PO Box 4519, Pocatello, ID 83205, herein referred to as "**Grantee**".

That Grantor, for good and valuable consideration, the receipt whereof is hereby acknowledged, does hereby REMISE, RELEASE, CONVEY and forever QUITCLAIM, unto Grantee, that certain real property situated in the County of Bannock, State of Idaho, generally prescribed as Part of the S1/2 of Section 23, Township 8 South, Region 36, E.B.M., and more particularly described as:

A portion of the east half of the southwest quarter, namely all areas east of the railroad tracks of Section 23, Township 8 South, Region 36, E.B.M.

Also, beginning at the south 1/16 corner on the meridional center line of Section 23, Township 8 South, Range 36 E.B.M., thence easterly along the south 1/16 of said section 1,632 feet, more or less, to a point on the southwesterly right of way lone of U.S. Highway 91-191, said point being marked by a department of highways reference marker, thence southeasterly along said southeasterly right of way line 70 feet, thence westerly parallel to the south 1/16 line of said section 120 feet; thence northwesterly parallel to aforementioned southwesterly highway right of way line, 48 feet, more or less, to a point that is 20 feet at right angles southerly from the south 1/16 line of said section; thence westerly parallel to said south 1/16 line, 1465 feet, more or less, to a point that is 20 feet southerly and 60 feet easterly from the south 1/16 corner on the meridional center line of said section, thence southerly parallel to the meridional center line of said section, 340 feet; thence westerly parallel to the south 1/16 line of said section, 60 feet to intersect the meridional center line of Section 23: thence northerly along said meridional center line, 360 feet to the point of beginning.

Also, commencing at the south 1/16 corner on the meridional center line of Section 23, Township 8 South, Range 36 E.B.M., thence easterly along the south 1/16 lone of said section, 1632 feet, more or less, to a pint on the southwesterly right of way line of U.S. Highway 91-191, said point being marked by a department of highways reference marker, thence southeasterly along said southeasterly right of way line, 70 feet to the point of beginning; thence continuing southeasterly along said right of way line 132 feet, thence westerly parallel to said south 1/16 line 120 feet; thence northwesterly, parallel to said right of way line, 132 feet, thence easterly parallel to said south 1/16 line, 120 feet to the point of beginning, Bannock County, Idaho.

SUBJECT TO all valid easements, right of ways, covenants, conditions, reservation and restrictions of record.

Grantor quitclaims to Grantee said real property together with all estate, right, title, interest, possession, claim and demand whatsoever, in law as well as in equity of the Grantor in or to the said property, and all and singular the tenements, hereditaments, and appurtenances thereunto belonging.

ATTACHMENT 1

IN WITNESS WHEREOF, Grantor has hereunto set its hand on the day and year first above written.

GRANTOR: **Idaho State University**

By:_______________________________
James A. Fletcher, Vice President,
Finance and Administration

STATE OF IDAHO)
) ss.
County of Bannock)

On this _____ day of _____, 2016, before me, the undersigned, a Notary Public in and for said State. Personally appeared James A Fletcher, known to me to be the Vice President for Finance and Administration of Idaho State University, the University that executed the instrument, and acknowledged to me that he executed the same for and on behalf of Idaho State University.

IN WITNESS WHEREOF, I have hereunto set my hand and affixed my official seal the day and year in this certificate first above written.

____
Notary Public for Idaho
Residing at _____________________________
My Commission Expires: __________________

Vernon L. Nelson
Appraisals, Consulting and Real Estate
Idaho Certified General Appraiser, CGA-143
P. O. Box 191, Rockland, Idaho 83271
Office -208-548-2690, Cell- 208-221-7537

BILLING DATE: September 30, 2014

BILLED TO: Idaho State University Foundation, Stop 8050, 921 South 8th Avenue, Pocatello, Idaho 83201. C/O Ms. Pauline Thiros.

PROPERTY APPRAISED: Idaho State University Foundation 10.17 acre McCammon property. Located some four miles North of McCammon, Idaho in Bannock County.

APPRAISAL FEE: **$1,620.00. See attached appraisal work time sheet.**

Pay $1,400.00 if paid on delivery of the Appraisal Report.

Please Make Check to:
Farm and Land Services
P. O. Box 191
Rockland, Idaho 83271

Thank you for the opportunity to have been of service.

Vernon L. Nelson

Vernon L. Nelson
Farm and Land Services
Idaho General Real Estate Appraiser - CGA-143.
Expires 01/09/2015.

Appraisal Work Time:

Appraisal Inspection	1.00 hrs
Courthouse Research	0.40 hrs
Market Information Research	9.20 hrs
Subject Property Valuation Analysis	3.40 hrs
Report Writing/Compiling Report/Copying	13.00 hrs
Total Time -	27.00 hrs

Appraisal Fee: 27.0 hrs x $60/hr = $1,620.00

ATTACHMENT 2

ATTACHMENT 2

This report is the result of an Appraisal which conforms to the Uniform Standards of Professional Appraisal Practice (USPAP) for an appraisal report. It presents only summary discussions of the data, reasoning, and analysis that were used in the appraisal process to develop the Appraiser's opinion of the value. Any additional supporting documentation concerning the data, reasoning and analysis is retained in the Appraiser's files. The depth of the discussion contained in this report is to meet the needs of the client. The appraiser is not responsible for any unauthorized use of this report.

This report is the result of an Appraisal that has been completed for the Client who is the Idaho State University Foundation for matters pertaining to a potential sale of the subject property of this report. I have considered the Cost, Sales and Income Approaches to value and have used the approach or approaches to value, which in my opinion are the most applicable and relevant in the valuation analysis for the subject property.

CLIENT: Idaho State University Foundation.

APPRAISER: Vernon L Nelson
Farm and Land Services
P. O. Box 191
Rockland, Idaho 83271

SUBJECT: Idaho State University 10.17 acre McCammon property.

PURPOSE OF THE APPRAISAL: To provide the Appraiser's estimate of Market Value "As Is" of the Fee Simple Interest of the subject property.

PROPERTY RIGHTS APPRAISED: This is an appraisal of the Fee Simple Interest of the Subject Property of this report. It has been appraised as though the property parcels were free and clear without any encumbrances. Property rights considered are those surface rights and interests held by the Subject Property in Fee Simple. Mineral rights if any exist are not included. A Title Report has not been provided to the Appraiser, nor has a Title Report been viewed by the Appraiser.

AUTHORIZATION OF THE REPORT: This report has been prepared at the request of Ms. Pauline Thiros for the Idaho State University Foundation.

FUNCTION OF THE REPORT: This appraisal report has been prepared to assist the Client; who is the Idaho State University Foundation in matters pertaining to a potential sale of the subject property.

EFFECTIVE DATE OF THE REPORT VALUE: The effective date of value is August 21, 2014.

DATE OF THE APPRAISAL REPORT: September 15, 2014.

INTEREST APPRAISED: The Fee Simple ownership interest has been appraised.

DISCUSSION OF THE APPRAISAL PROBLEM: I have been asked to prepare an **Appraisal Report** of the Idaho State University 10.17 acre McCammon property. The property consists of 8.50 acres of river bottom land bisected by the Portneuf River with the remaining 1.67 acres considered as dry grazing land that provides access to the subject from Highway 91 with the access ending at the river and the need to cross the river to reach most of the 8.50 acres. The subject is considered with a highest and best use as an add on property to the Wayne Taysom property which adjoins the subject property on the South and North sides with a pasture land use or wildlife habitat use for the property as an add on land parcel. The adjoining Taysom property actually provides better access to the subject property than the current existing access to the property. The property is zoned Agricultural and has no future development potential other than as an add on land parcel to the adjoining Wayne Taysom property with use as pasture land or wildlife habitat land.

The **Appraisal Problem** is to complete a Market Value "as is" of the Fee Simple Interest of the Subject Property for use by the Idaho State University Foundation in matters pertaining to a potential sale of the subject property.

DEFINITION OF MARKET VALUE: Market Value means the most probable price which a property should bring in a competitive and open market under all conditions requisite to a fair sale, the buyer and seller each acting prudently and knowledgeably, and assuming the price is not affected by undue stimulus. Implicit in this definition are the consummation of a sale as of a specified date and the passing of title from seller to buyer under conditions whereby:

Buyer and Seller are typically motivated;
Both parties are well informed or well advised, and acting in what they consider their own best interest;
A reasonable time is allowed for exposure in the open market;
Payment is made in terms of cash in U. S. dollars or in terms of financial arrangements comparable thereto; and
The price represents the normal consideration for the property sold unaffected by special or creative financing or sales concessions granted by anyone associated with the sale.

Rules and Regulations, Federal Register, Vol. 55, No. 129, Page 27771.

FEE SIMPLE INTEREST DEFINED: In the "English Common Law", the Fee Simple Interest is defined as the highest estate one can hold in land and which consists of a collection or "Bundle" of rights held by the owner which includes the right to occupy and use, to build upon, to grant easements, to mortgage, to mine or farm, to restrict use, to create covenants, to sell or refuse to sell, to give away or abandon, to rent or lease and to devise by will. No mineral interests or rights are valued or considered in this appraisal.

COMPETENCY PROVISION: I have taken the appropriate steps to comply with the competency provision as required by USPAP. Requirements have been satisfied, based on my educational training, knowledge of the area, prior appraisal experience of appraising rural, commercial and residential properties.

This appraisal has been developed in conformance with the Uniform Standards of Professional Appraisal Practice as adopted by the Appraisal Standards Board of the Appraisal Foundation. It conforms to the standards of the Professional practice and Code of Ethics of the Appraisal Institute.

In my 25 years of Real Estate Appraisal Practice and work, I have appraised many agricultural and development properties in Southern and Eastern Idaho to include the Bannock County area where the subject property is located. I feel, based on my lifetime involvement in agriculture and my appraisal experience, I am competent under USPAP to complete this appraisal assignment.

EXPOSURE AND MARKETING TIME: Market Value as estimated and the costs and other estimates used in arriving at the estimate of value is as of the date of the appraisal. Because markets upon which these estimates and conclusions are based upon are dynamic in nature, they are subject to change over time. Further, the report and value estimates are subject to change if future physical, financial or other conditions differ from the conditions as of the effective date of this appraisal report, which date is September

In applying the market value definition to this appraisal, a reasonable exposure time of 6 months has been estimated for the subject property based on current market demand for Agricultural properties and after talking with area Farmland Realtors and Appraiser's. Exposure time is the estimated length of time the property interest being appraised would have been offered in the market prior to the hypothetical consummation of a sale at market value on the effective date of the appraisal; exposure time is always presumed to precede the effective date of the appraisal.

Market Value as estimated in this appraisal report is for the effective date of value as shown and contained in this appraisal report. The markets upon which the conclusions and values for the subject property are based are dynamic in nature and subject to change over time. Further, the report and value estimates are subject to change if future physical, financial and other conditions differ from conditions as of the date of appraisal.

Marketing time, however, is an estimate of the amount of time it takes to sell a property interest at the estimated market value during the period after the effective date of the appraisal. An estimate of marketing time is not intended to be a prediction of a date of sale. It is appropriate to assume that the value as of the effective date of appraisal remains stable during a marketing period. Additionally, the appraiser/s have considered market factors external to this appraisal report and have concluded that a reasonable marketing time for the subject property is 6 months.

In today's market there is good demand for agricultural land to include cropland and pasture lands. The subject property is a unique property based on its location, size and type in that it has very little use by itself. It has a much better use as an add on property to the adjoining Taysom property with it becoming a part of the Taysom pasture land which also includes river bottom land which based on its adjoining location provides better overall access to the subject property than the current existing subject property access provided by the Subject Property land located in Tax Nos. 7 and 9 Many buyers in today's agricultural market are outside investors to include pension fund companies. Investors do not want to place their monies in the volatile investment markets and would rather purchase quality farmland as an investment. Low interest rates, high commodity prices and the volatile investment markets had created the current buyer demand nationwide for quality farmland. Farmland values in certain areas have exploded over what they were two and three years ago. The subject because it is considered with a highest and best use as an add on land parcel to the adjoining Taysom property with use as pasture or wildlife habitat creates a special situation where a marketing period and time is almost exclusively based on the desire and demand for Mr. Wayne Taysom to purchase the property for his own use as an add on property to his existing adjoining property. The small acreage size, location, access to the river bottom land and also the overall shape and potential flooding of the river bottom land very much limits the demand or desire to own the subject property creating an almost impossible ability to forecast exposure and marketing times for the subject property.

SCOPE OF THE APPRAISAL: The scope of the appraisal process encompasses the necessary research and analysis to prepare and complete a report in accordance with the intended use and the Uniform Standards of Professional Appraisal Practice of the Appraisal Foundation. In regards to the Subject Property tracts, this involved the following steps:

On August 21, 2014, a visual drive over and walk over inspection of the subject property was completed by myself, Vernon L. Nelson, accompanied by Mr. Wayne Taysom who is the adjoining property owner to the South side of the subject property.

This report has been prepared at the request of the Client to estimate the Market Value "As Is" of the Fee Simple Interest of the subject property land parcels for use in matters pertaining to a potential sale of the subject property.

I have gathered and confirmed information on comparable land sales in the Subject's market area for use in the valuation analysis.

The area and neighborhood data contained in this report is based on information available through office files, past appraisal reports that have been completed in the area and interviews with local people such as Realtors, Bankers, Buyers and Sellers of Real Estate and other Appraisers who are considered to have good knowledge of the area.

The Highest and Best Use of the Subject Property is based on the type and analysis of the properties to include land type, zoning, land size, land shape, overall access to the subject property, current and past uses of the land parcel, surrounding area land use, and market conditions. The location, small property size at 10.17 acres, very irregular overall property shape, river bottom land portion consisting of 8.50 acres mol which is bisected by the Portneuf River along with the potential for flooding along with access to the 8.50 acres requiring the crossing of the Portneuf River without a bridge to reach that portion of the subject property very much limits the use of the subject property.

In developing the approaches to value, I have considered use of the Cost, Sales and Income Approaches to value and used the approach/approaches to value which are the most relevant in valuing the subject property based the type of subject property land, subject property location, physical and access factors pertaining to the subject property and available market information for use.

After assembling and analyzing the data defined in the scope of this report, a final estimate of the Market Values of the Fee Simple Estate of the subject properties of this report were made.

This appraisal has been prepared for the Client who is the Idaho State University Foundation to help estimate a value of the subject property for use in matters pertaining to a potential sale of the subject property.

This Summary Appraisal Report is a brief recapitulation of my appraisal data, analysis and conclusions. Supporting documentation not contained in this report is contained in my appraisal files.

HISTORY OF THE SUBJECT PROPERTY: The subject property as described and valued in this report has been under the ownership of Idaho State University for a reported many years.

ZONING: The subject property is zoned Agricultural according to the Bannock County Planning and Zoning Department.

CURRENT AGREEMENTS OF SALE, OPTION AND LISTING: None has been reported or found to exist at the time of this appraisal. There has been talk between the Idaho State University Foundation and Mr. Wayne Taysom who owns the adjoining land to the south side of the subject property regarding a possible sale and purchase of the subject property.

APPRAISER'S PERSPECTIVE ON MARKET CONDITONS AND VALUE: The market value estimate of this appraisal report is based on the effective date of August 21, 2014. I have researched the subject area market for sales and market data that will fit within the effective valuation date of August 21, 2014. This report has a date of September 15, 2014 with a report valuation date of August 21, 2014. Because these two dates are very close in time I find that Market Value under such circumstances is considered to be current.

EFFECT ON VALUE OF ENCUMBRANCES, EASEMENTS AND ENCROACHMENTS: No encumbrances, on the subject property were noted, nor have I been made aware of any encumbrances on the subject property and, therefore, there is no effect on value from any encumbrances. There is a power line easement that crosses the Eastern area of the property.

ATTACHMENT 2

SUMMARY OF FACTS AND CONCLUSIONS

Subject Property:	Idaho State University Foundation - McCammon 10.17 acres mol.
Location:	Four miles North of McCammon, Idaho in Bannock County.
Owner of Record:	The records of the Bannock County Tax Assessor show ownership as Idaho State University.
Type of Report:	Appraisal Report.
Client for the Report:	Idaho State University Foundation.
Authorization:	Ms. Pauline Thiros for the Idaho State University Foundation.
Intended Users of the Report:	Idaho State University Foundation.
Purpose of the Report:	To estimate the Market Value "As Is" of the Fee Simple Interest for the Subject Property of this report.
Function of the Appraisal:	For use in matters pertaining to a sale of the subject property.
Property Rights Appraised:	Fee Simple Interest.
Appraisal Conditions:	The valuation of the subject property has been completed as the Market Value "As Is" of the Fee Simple ownership interest. There is not a full survey and legal description for the subject property of this report. Tax No. 7 consisting of 1.34 acres and Tax No. 9 consisting of 0.33 acres have legal descriptions, but the remaining 8.50 acres mol which is part of Tax No. R4057022200 consisting of 80.0 acres mol does not have a legal description. It is located on the East side of the railroad tracks and is bisected by the Portneuf River. The land located to the East of the railroad tracks was measured by the County Assessor to consists of 8.50 acres mol. There is no current land survey or legal description to describe the 8.50 acres mol located to the East of the River and not included with Tax Nos. 7 and 9. Total acreage is estimated to be 10.17 acres.
Brief Property Description:	Subject property consists of approximately 10.17 acres. The land consists of Tax 7 which is 1.34 acres of land including the 20 foot wide access from Tax 9 to the river with a portion of Tax 7 located on the West side of the river requiring the need to cross the river without a bridge to access the property. Tax 9 is located adjacent to Highway 91 and provides access to the subject property from the highway. Tax 9 consists of 0.33 acres and is also the site of an old residence in poor condition and a well that is located in an area

subject to runoff flooding from the highway and the East because Tax 9 land is located well below the road grade of Highway 91. The remaining 8.50 acres is located to the East of the Railroad tracks and is bisected by the Portneuf River. Access to the west end of Tax 7 and the 8.50 acres requires crossing the river without use of a bridge. The 8.50 acres is river bottom and is subject to flooding from the river during periods of high water and runoff. The best river crossing access to the property is from the adjoining Wayne Taysom property. The river bottom land also has areas of heavy undergrowth of willows, haws bushes, native vegetation and noxious weeds that need to be controlled. The subject property because of its agricultural zoning, small and irregular size and shape along with flooding from runoff and the river has no development potential. The land has the best use as an add on land parcel to the adjoining Wayne Taysom property with an add on use for pasture or wildlife habitat.

Zoning:	Agricultural.
Flood Hazard:	Bottom land consisting of approximately 8.50 acres according to the measurements of the Bannock County Assessor is bisected by Portneuf River and is subject to flooding during the periods of high water runoff in the Portneuf River.
Highest and Best Use:	Agricultural - Add on tract to adjoining property for use as livestock pasture or wildlife habitat with access to the bottom 8.50 acres from use of land in Tax 7 and Tax 9 which connects with Highway 91.
Date of Value Estimate:	August 21, 2014.
Date of the Report:	September 15, 2014.

*Estimates of Value -

Cost Approach:	$ N/A
Sales Comparison Approach:	$6,600
Income Approach:	$ N/A
Subject Property Value:	$ N/A

* Valued using the Extraordinary Assumption as discussed in the Letter of Transmittal and in the appraisal report.

ATTACHMENT 2

Overall Property Comments

Mineral Rights: Mineral Rights are assumed to be included in the Fee Simple Interest. I have not researched or been made aware of any mineral rights that pertain to the subject property. Mineral rights are not typical in the agricultural market and are not considered to have any effect on value.

Water Rights: The subject property has no water rights for irrigation.

Other:

Climate - High Desert valley area with 10 to 12" annual precipitation.
Elevation - 4,800 feet.
Frost Free Days - 100 to 120 days.
Utilities - Electrical and telephone are available to Tax 9 located off of Highway 91.
City Services - None
Shopping, Employment and Services - Basic services located in McCammon. Major Major retail, professional and medical are located in Pocatello.
Pocatello
Schools - K - 12 grades are part of the Marsh Valley School District with elementary schools located in Inkom. McCammon, Lava Hot Springs and Downey. Junior High and High School is located in Arimo.
Location - Average in location to McCammon and Pocatello.
Access - Good for Tax 7 and Tax 9 from Highway 91 and poor for the access to the river bottom land consisting of 8.50 acres because of the need to cross the river to access much of this portion of the subject property.
Rentability - Poor
Market Appeal - Poor. Most attractive as an add on land parcel to adjoining land.

Easements and Encroachments: No easements or encroachments are reported or known to exist in the area or to have an effect on the property.

Hazards and Detriments: Potential for runoff flooding for the land site in Tax 7 and flooding of the 8.50 acres of river bottom land from high water overflow from the Portneuf River.

ATTACHMENT 2

ATTACHMENT 2

SUBJECT PROPERTY PHOTOGRAPHS

1 - Old House located on Tax No. 9 land adjacent to Highway 91.

2 - Well and Pump House located on Tax No. 9 land near the old House. This area has the potential for flooding from runoff from Highway 91 and the area to the East which is located on an higher elevation than the subject land located in Tax No. 9. Well condition and availability for use is unknown.

ATTACHMENT 2

ATTACHMENT 2

SUBJECT PROPERTY PHOTOGRAPHS

1 - Access to Subject Property Tax No. 9 land from Highway 91. Old house is located in the background. The land is below road level in elevation and prone to runoff flooding from Highway 91 and the area to the East and South of the property.

2 - Southeast area of Tax No. 9 land with the private road access to the Wayne Taysom residence located in the background.

ATTACHMENT 2

ATTACHMENT 2

SUBJECT PROPERTY PHOTOGRAPHS

1 - View looking East at the 20 foot wide land strip of Tax No. 7 which dead ends at the Portneuf River requiring the need to cross the river without a bridge to access the West area of Tax No. 7 and the remaining subject property 8.50 acres.

2 - View of the subject property's river bottom land consisting of 8.50 acres mol that is bisected by the Portneuf River with the need to cross the river without a bridge to access the land.

ATTACHMENT 2

SUBJECT PROPERTY PHOTOGRAPHS

1 and 2 - View of the Portneuf River as it bisects through the river bottom land of the subject property located to the East of the Railroad tracks consisting of 8.50 acres mol according to County Assessor's land measurement.

ATTACHMENT 2

SUBJECT PROPERTY PHOTOGRAPHS

1 and 2 - River bottom land consisting of 8.50 acres mol according to County Assessor's land measurement. Note the overgrowth of willows, haws bushes, sage brush and noxious weeds that need controlling. The overgrowth limits the use of this area of the subject property to Wildlife habitat rather than pasture.

ATTACHMENT 2

SUBJECT PROPERTY PHOTOGRAPHS

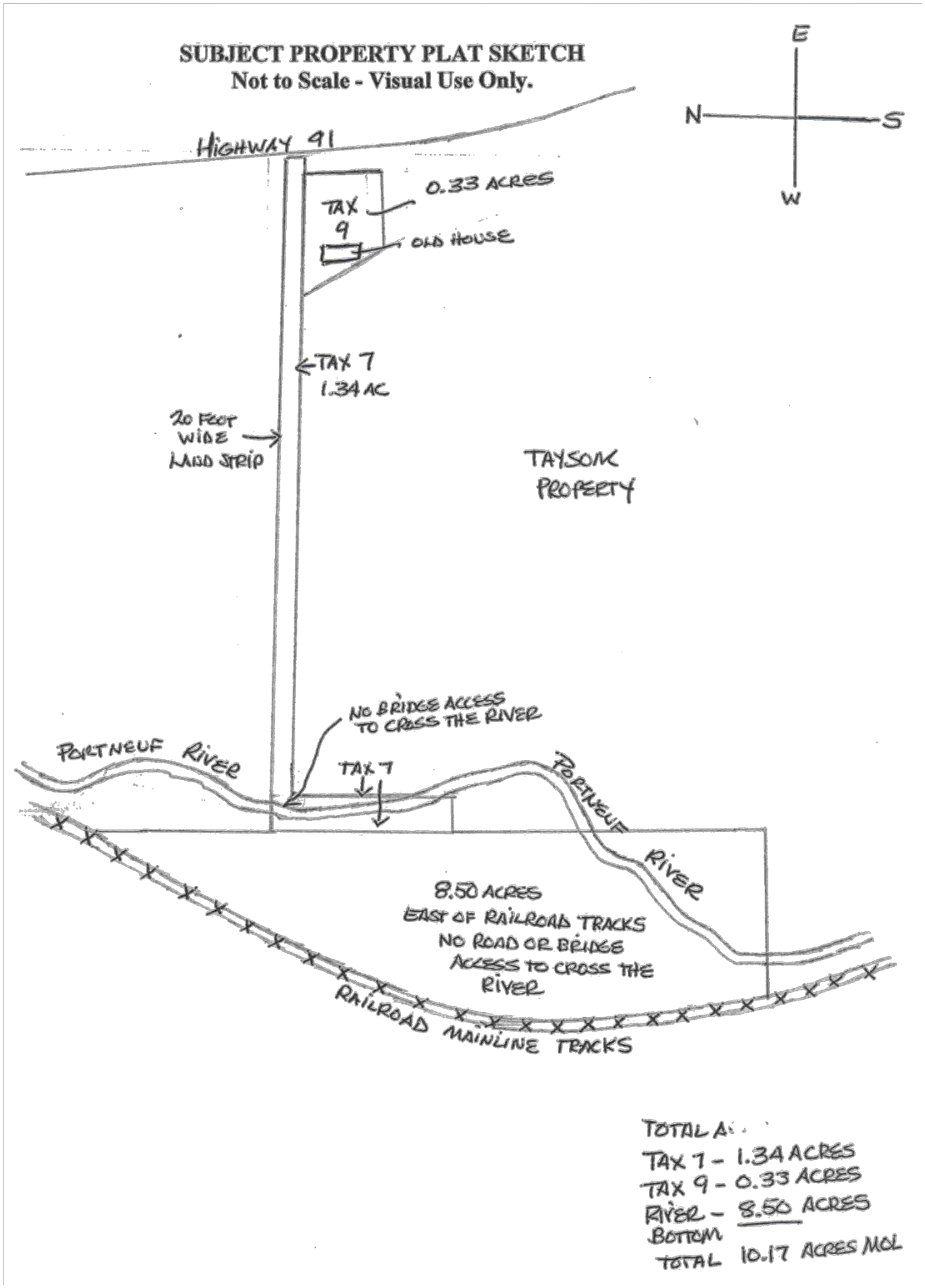
1 - River bottom land located to the East of the river that has pasture potential but also has a noxious weed problem.

ATTACHMENT 2

PLAT MAP

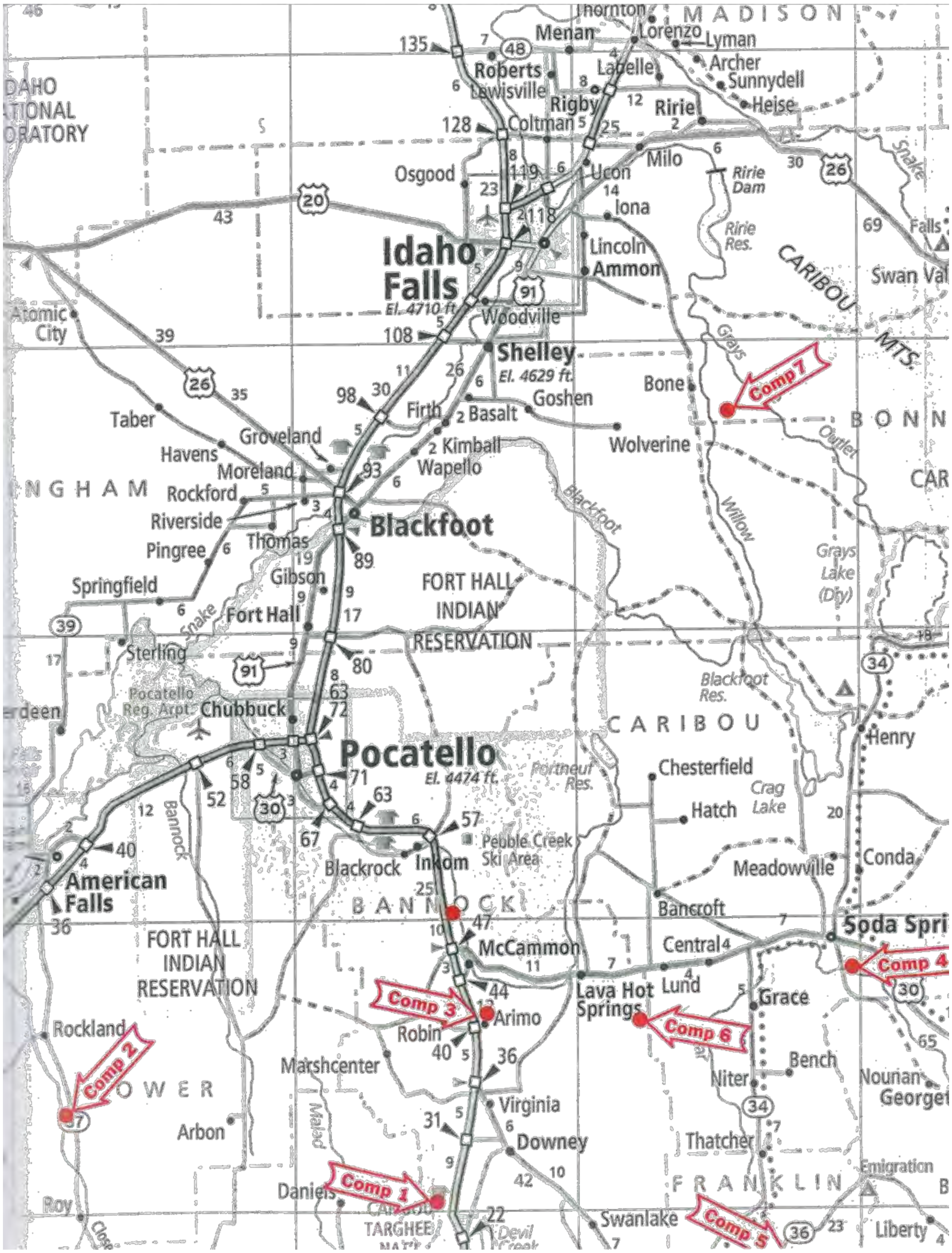
ATTACHMENT 2

ATTACHMENT 2



ATTACHMENT 2

LOCATION MAP



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SALES SUMMARY VALUE TABLE

Sale No.	Buyer	Sale Date	Location	Dry Pasture Acre/Size	Abstracted Price/Acre
One	Scott Land and Livestock, Inc	08/2013	Downey area Bannock County	Dry Grazing 1,212.83 acres	$433
Two	Udy	09/2012	Power County Rockland Valley	Creek Bottom Pasture 83.56 acres Dry Grazing 34.23 acres	$817 $675
Three	Arimo Corp	11/2011	Arimo area Bannock County	Dry Grazing 79.74 acres	$565
Four	Schaneveldt	09/2010	Soda Springs area of Caribou County	Dry Grazing 239.00 acres	$550
Five	Confidential	05/2010	Franklin area Franklin County	Dry Grazing 435.00 acres	$700
Six	Neil Anderson	03/2010	Lava Hot Springs Area Bannock County	Native Mountain Pasture - 1,248.00 acres	$582
Seven	Roxine Store	11/2009	Bone area of Bingham County	Dry Grazing - 1,920.00 acres	$781
Five	Hancock	07/2009	Daniels Area Oneida County	Native Mountain Pasture - 491.66 acres	$933

The comparable sales are the most recent sales transactions that I could find based on my market research. There are no sales directly comparable to the subject property with similar overall physical and general characteristics to include small acreage size, irregular shape, access problems to the river bottom land, flooding and runoff problems. The subject property is considered to be an add on land parcel to the adjoining Wayne Taysom property with the add on use as pasture or wildlife habitat. The preceding seven sales are considered to be the most comparable to the subject property for this valuation analysis. The sales consist of Dry Grazing Pasture land or a combination of land types to include Native Mountain Pasture land and Dry Grazing.

Dry grazing pasture lands do not readily sell in the market as they are not readily available for sale.

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ATTACHMENT 2

ASSUMPTIONS AND LIMITING CONDITIONS

The Appraiser's certification appearing in the appraisal report is subject to the following conditions and to such other specific and limiting conditions as are set forth in the report.

1. The Appraiser assumes no responsibility for matters of a legal nature affecting the property appraised or the title thereto, nor does the Appraiser render any opinion as to the title, which is assumed to be marketable. The property is appraised as though under responsible management.

2. Sketches in the report may show approximate dimensions and are included only to assist the reader in visualizing the property. The Appraiser has made no survey of the property. Drawings and/or plats are not represented as an engineer's work product, nor are they proved for legal reference.

3. The Appraiser is not required to give testimony or appear in court because of having made the appraisal with reference to the property in question, unless arrangements have been previously made.

4. Any distribution of the valuation in the report applies only under the existing program of utilization. The separate valuations of components must not be used outside of this appraisal and are invalid if so used.

5. The Appraiser has, in the process of exercising due diligence, requested, reviewed and considered information provided by the ownership of the property and client, and the Appraiser has relied on such information and assumes that there are no hidden or unapparent conditions of the property, subsoil, or structures, which would render it more or less valuable. The Appraiser assumes no responsibility for such conditions, for engineering which might be required to discover such factors, or the cost of discovery or correction.

6. While the Appraiser has inspected the subject property and has considered the information developed in the course of such inspection together with the information provided by the ownership and client, the Appraiser is not qualified to verify or detect the presence of hazardous substances by visual inspection or otherwise, nor qualified to determine the effect, if any, of known or unknown substances present. Unless otherwise stated, the final value conclusion is based on the subject property being free from hazardous waste contaminations, and it is specifically assumed that present and subsequent ownerships will exercise due diligence to insure that the property does not become otherwise contaminated.

7. Information, estimates, and opinions furnished to the Appraiser, and contained in this report, were obtained from sources considered reliable and believed to be true and correct. However, no responsibility for accuracy of such items furnished to the Appraiser can be assumed by the Appraiser.

8. Unless specifically cited, no value has been allocated to mineral rights or deposits.

ATTACHMENT 2

ASSUMPTIONS AND LIMITING CONDITIONS

9. Water requirements and information provided has been relied on and, unless otherwise stated, it is assumed that:

All water rights to the property have been secured or perfected, that there are no adverse easements or encumbrances, and the property complies with the Bureau of Reclamation or other regulations;
Irrigation and domestic water and drainage system components, including distribution equipment and piping, are real estate fixtures;
Any mobile surface piping or equipment essential for water distribution, recovery, or drainage is secured with the title to real estate; and
Title to all such property conveys with the land.

10. Disclosure of the contents of this report is governed by the applicable law and/or bylaws and regulations of the professional appraisal organization/s with which the Appraiser is affiliated.

11. Neither all nor any part of the report, or copy thereof, shall be used for any purposes by anyone but the client specified in the report without the written consent of the Appraiser. This report was prepared for the client's use at the client's sole discretion within the framework of the function stated in the report and its use for any other purpose is beyond the scope contemplated in the appraisal.

12. Where the appraisal conclusions are subject to satisfactory completion, repairs, or alterations, the appraisal report and value conclusions are contingent upon completion of the improvements in a workmanship manner consistent with the plans, specifications and/or scope of work relied upon in the appraisal.

13. No one provided significant professional assistance to the person/s signing this report.

14. Appraiser liability is limited to the fee charged for the report and professional services.

15. Acceptance of the report by the client constitutes acceptance of all assumptions and limiting conditions contained in the report.

16. Other Contingent and Limiting Conditions:

This report has been prepared for the Fee Simple Interest in the Subject Property. It is assumed that no restrictions, contracts, or covenants are in place that would alter the Fee Simple Interest of the property appraised in this report.

Prior to the acceptance of this appraisal assignment, I have performed no pervious services pertaining to the subject property.

ATTACHMENT 2

ATTACHMENT 2

CERTIFICATION OF VALUE

I, Vernon L. Nelson, do hereby certify that except as otherwise noted in this Summary Appraisal Report:

I have personally inspected the Subject Property of this report.

I have no present or contemplated future interest in the Real Estate that is the Subject Property of this Summary Appraisal report.

I have no personal interest or biased with respect to the Subject Property of this Summary Appraisal Report or the parties involved.

My compensation is not contingent upon the reporting of a predetermined value or direction of value that favors the Client, the amount of the value estimate, the attainment of a stipulated result, or the occurrence of a subsequent event.

To the best of my knowledge and belief, the statements of fact contained in this Summary Appraisal report, upon which the analysis, opinions and conclusions expressed herein, are true and correct.

This Summary Appraisal report sets forth all of the limiting conditions imposed by the terms of this assignment or by the undersigned affecting the analysis, opinions and conclusions in this Summary Appraisal report.

My analysis, opinions and conclusions were developed and this report has been prepared in conformity with the Uniform Standards of Professional Appraisal Practice.

I certify, that to the best of my knowledge and belief, the reported analysis, opinions and conclusions of this report were developed and this report has been prepared in conformity with the requirements of the Code of Ethics and the Standards of the Professional Appraisal Practice of the Appraisal Institute.

No one other, than I, Vernon L. Nelson, the undersigned prepared the analysis, opinions and conclusions concerning the Subject Property which are set forth in this Summary Appraisal report.

The reported analysis, opinions and conclusions are limited by the reported assumptions, limiting conditions and are my personal, unbiased professional analysis, opinions and conclusions.

Prior to accepting this Appraisal assignment, I have performed no Appraisal Services or other Services involving the subject property, in any capacity, in the three year period previous to the date of value in the appraisal.

ATTACHMENT 2

CERTIFICATION OF VALUE

Unless otherwise disclosed in this report, I have not been engaged to appraise the subject property for the purpose of market value by any party except (the client), (my employer), as identified in this report.

Effective July 1, 1991, the State of Idaho implemented a voluntary program of licensing and certification for Real Estate Appraisers,. The program became mandatory July 1, 1992. I have met the qualifications to be a General Real Estate Appraiser and I am currently certified in the State of Idaho. I am licensed to appraiser all types of Real Estate. To date, I have completed the requirements under the continuing education program for Real Estate Appraiser's in the State of Idaho. My Certification fore a General Real Estate Appraiser is under Certification No. CGA-143, which expires 01/09/2015.

Based on the data, factors and assumptions contained in this report, it is my opinion that the Subject Property had the following estimated Market Value "As Is" of the Fee Simple Interest as of August 21, 2014:

SIX THOUSAND SIX HUNDRED DOLLARS
***** $6,600 *****

Vernon L. Nelson

Vernon L. Nelson, Idaho
Farm and Land Services
Idaho CGA-143
Expires 01/09/2015

9/15/2014
Date

ATTACHMENT 2

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IDAHO STATE UNIVERSITY

SUBJECT

Approval of the Ground Lease between Idaho State University and the Idaho College of Osteopathic Medicine.

REFERENCE

April 2007	Idaho State Board of Education (Board) approved purchase of ISU-Meridian property and joint operations agreement with Joint SD #2 (Meridian)
February 25, 2016	Board authorized ISU to execute a Collaborative Affiliation Agreement

APPLICABLE STATUTES, RULE OR POLICY

Idaho State Board of Education Governing Policies & Procedures, Section V.I. 5.b.i.

BACKGROUND / DISCUSSION

On February 25, 2016, in a special meeting of the Board, Idaho State University (ISU) was authorized to execute the Collaborative Affiliation Agreement between ISU and the Idaho College of Osteopathic Medicine (ICOM) for the creation of a college of osteopathic medicine on the ISU-Meridian campus. The Collaborative Affiliation Agreement provides for the execution of a lease between the parties for an initial period of forty (40) years, with the opportunity to extend the lease for two (2) additional (10) year periods.

Under the terms of the proposed Ground Lease Agreement between ISU and Idaho College of Osteopathic Medicine, LLC, ISU would lease 2.8 acres to ICOM as the site for the construction of a building to house the proposed osteopathic school.

The Collaborative Affiliation Agreement also requires that the parties abide by the terms of the Master Declaration Agreement and Joint Operations and Maintenance Agreement that ISU entered into with the West Ada School District (School District) on December 4, 2007. ISU has notified the School District of its intent to lease, and has requested written consent for the Ground Lease. Both ISU and the School District will have the opportunity to review and approve the ICOM site development plan once it is available.

IMPACT

As detailed in Section 4 of the Ground Lease, ICOM will pay ISU $15,833.33 each month for the first year of rent, which is an annual amount of $190,000.00, computed at $0.79 per square feet. The rent amount is based upon an appraisal performed by Valbridge Property Advisors on April 14, 2016. Each year the rent shall increase by two percent (2%) of the rent payable for the previous year.

ATTACHMENTS

STAFF COMMENTS AND RECOMMENDATIONS

Lease of the subject property (currently used as parking space) will enable ICOM to construct its medical school facility in close proximity to ISU's Meridian facilities and will enable collaboration and mutual support between ISU-Meridian and ICOM operations, with no anticipated negative impact on West Ada School District operations. Staff recommends approval.

BOARD ACTION

I move to authorize Idaho State University to enter into a Ground Lease Agreement with the Idaho College of Osteopathic Medicine, LLC in substantial conformance to the draft lease agreement provided in Attachment 1, and in coordination with the West Ada School District and the Idaho Division of Public Works.

Moved by____________ Seconded by_____________ Carried Yes____ No____

GROUND LEASE

This GROUND LEASE ("**Ground Lease**") is made as of the ____ day of ____________ 2016 ("**Effective Date**"), by and between Idaho State University ("**ISU**"), a state institution of higher education governed by the Idaho State Board of Education, and Idaho College of Osteopathic Medicine, LLC, an Idaho limited liability company ("**LESSEE**") (each a **"Party"** or together the **"Parties"**). The Parties specifically agree and acknowledge that the approval signature of the Leasing Manager, Division of Public Works, Department of Administration, is a required signature to the effectiveness of this Ground Lease.

WITNESSETH:

WHEREAS, ISU owns that certain real property located at the ISU-Meridian Health Science Center, 1311 E. Central Drive, Meridian, ID 83642, and is more particularly described on Exhibit A attached hereto and incorporated herein by this reference (the "**ISU-Meridian**");

WHEREAS, LESSEE is a private company created by its organizers for (i) the purpose of creating and operating a private accredited college of osteopathic medicine in the State of Idaho and/or (ii) other purposes as set forth in Section 5.a. of this Ground Lease;

WHEREAS, the Parties entered into a Collaborative Affiliation Agreement ("**CAA**") on February 26, 2016 and an executed copy of such agreement is attached hereto as Exhibit B and incorporated herein by reference;

WHEREAS, it is agreed that this Ground Lease is subject to all applicable provisions of the Master Declaration Agreement and the Joint Operations and Maintenance Agreement dated December 4, 2007 (the "**Declaration**"), by and between ISU and the Joint School District No. 2 (now known as West Ada School District) and an executed copy of such agreement is attached hereto as Exhibit C and incorporated herein by reference.

WHEREAS, LESSEE and ISU have determined that LESSEE shall locate its college of osteopathic medicine on a parcel of land located at ISU-Meridian;

NOW, THEREFORE, ISU and LESSEE do hereby agree as follows:

1. <u>Definitions.</u> The following terms, as used in this Ground Lease, shall have the meanings hereinafter set forth:
    a. "**Common Area**" shall have the meaning ascribed to such term in the Declaration.
    b. "**Construction Documents**" shall mean those certain contract documents, written plans, and specifications prepared by or on behalf of LESSEE and

reasonably approved for construction by applicable local governing jurisdictions, the State of Idaho, if applicable, and ISU.

c. "**Hazardous Substance**" shall mean any substance which is toxic, ignitable, reactive, radioactive, or corrosive and which is regulated by any local government, the State of Idaho, or the United States government. Hazardous Substance includes any and all materials or substances which are defined as hazardous waste, extremely hazardous waste, or a hazardous substance pursuant to state, federal, or local government law. Hazardous Substance includes, but is not restricted to asbestos, polychlorobiphenyls (PCBs), and petroleum.

d. "**Lessee Building**" shall mean that certain building and related alterations, additions, and improvements which are to be constructed on the Leased Premises pursuant to the Construction Documents.

e. "**Lease Year**" shall mean the twelve (12) month period beginning with the Lease Commencement Date (as defined in Section 4) and ending on the date that is twelve (12) months later, then each successive twelve (12) month period.

f. **"Effective Land Area"** shall mean an Effective Land Area calculation of 5.55 acres. This area is based on a proportional ratio of the assumed building size of the Lessee Building to the land area of the overall Parcel. This Effective Land Area calculation is larger than the actual Leased Premises to account for the proportional inclusion of Common Area non-exclusive ingress, egress and utility easements and Common Area non-exclusive easements for shared parking in accordance with all applicable provisions of the Declaration.

g. **"Leased Premises"** shall mean that certain 2.80 acre area, identified and described in Exhibit D attached hereto, as the designated area for location of the Lessee Building and related improvements. The construction of the Lessee Building and related improvements must be confined to the Leased Premises boundary, subject to designated building set-backs and the recorded easements and restrictions set forth in the Commitment (as defined in Section 8.b.) that apply to the Overall Parcel and Leased Premises. Any disturbance of site improvements existing outside of the Leased Premises that are deemed necessary for utility extensions or pavement match, must receive written approval of either or both ISU and the West Ada School District, as required under the Declaration, which approval shall not be unreasonably withheld, conditioned or delayed, as any such construction work may be required to occur within their respective separate property boundaries. ISU represents and warrants that ISU, through the State of Idaho, owns fee title to the Leased Premises.

h. "**Unavoidable Delay**" shall mean all failures or delays in a Party's performance of its obligations hereunder, not within such Party's reasonable control, including without limitation, the impossibility of such performance which shall result from or be caused by any act of God; acts of the public enemy; wars; blockades; epidemics; earthquakes; storms; floods; explosions; strikes; labor disputes; riots; insurrections; breakage or accident to machines or lines or pipe or mains; act of any governmental agency or authority restricting or curtailing actions required under this Ground Lease or withholding or revoking necessary consents, approvals, permits, or licenses; equipment failures; inability to procure and obtain needed building materials so long as reasonable efforts are made to procure satisfactory substitute materials if practical; or delays of inclement weather; provided, that such Party shall pursue with reasonable diligence the avoidance or removal of such delay. The inability or refusal of a Party to settle any labor dispute shall not qualify or limit the effect of Unavoidable Delay. The inability of a Party to secure funds required to perform its obligations hereunder shall not constitute Unavoidable Delay.

2. <u>Term.</u> This Ground Lease shall commence on the Lease Commencement Date and shall remain in effect until the earlier of (i) the date that is forty (40) years after the Lease Commencement Date, (ii) the termination of this Ground Lease pursuant to Section 35; or (iii) the written agreement of the Parties (the "**Expiration Date**"), provided, however, that the Parties acknowledge and agree that LESSEE shall have the right to renew the term of this Ground Lease in accordance with the terms of Section 3 below. Notwithstanding the foregoing and subject to the terms and conditions of this Ground Lease, including, without limitation, Sections 8, 35, and 45 of this Ground Lease, in no event shall this Ground Lease be terminated without a party providing at least five (5) years advance written notice to the other party of such party's election to terminate this Ground Lease.

3. <u>Option to Renew.</u> The parties understand and agree that this Ground Lease, if still in effect at the Expiration Date, may be renewed by LESSEE, provided LESSEE is not at that time in breach of the CAA or this Ground Lease, for two (2) additional ten (10) year terms. The right to renew this Ground Lease shall be exercised by written notice of extension by LESSEE to ISU, no later than sixty (60) days prior to the expiration of the then-existing term.

4. <u>Rent Payment.</u> In consideration of the benefit conferred upon LESSEE under this Ground Lease, and without notice or demand, offset or deduction, except as expressly provided for in this Ground Lease, LESSEE shall make payable to ISU-Meridian, on the first day of each month, beginning on the date excavation of the Lessee Building commences, but, subject to Unavoidable Delay, no later than the 1st day of March, 2017 ("**Lease Commencement Date**"), $15,833.33, which is computed at the rate of $0.79 per square foot multiplied by the Effective Land Area ("**Base Land Payment**"), which is a yearly amount of $190,000.00. Notwithstanding the foregoing, in the event that LESSEE, despite its diligent efforts, has failed to obtain accreditation from COCA or any other applicable licensing authority on or prior to the date that is ten (10) business days prior to the Lease Commencement Date, the Lease Commencement Date shall be extended to the date that

is ten (10) business days following the date that LESSEE obtains such accreditation. The Base Land Payment shall be adjusted at the beginning of each Lease Year by two percent (2%) of the Base Land Payment for the immediately preceding Lease Year. This Ground Lease shall be absolute net, and LESSEE shall pay or reimburse all operating expenses including property taxes, insurance, common maintenance/repairs/replacement, and management.

5. Use. The Parties intend for LESSEE to construct the Lessee Building on the Leased Premises for the purpose of constructing, operating and maintaining a college of osteopathic medicine (the "**Permitted Use**"). Except as set forth in this Ground Lease, no material changes, modifications, or alterations can be made to the use of the Lessee Building unless it is done in writing and signed by the proper authority of each Party. If LESSEE abandons the Lessee Building and ceases making the Base Land Payment and such failure continues for ninety (90) days after written notice from ISU to LESSEE, it shall be an event of default and shall be grounds for termination of this Ground Lease.
    a. At all times during the term of this Ground Lease, LESSEE shall continuously (except for temporary closures due to casualty, condemnation or remodeling) use the Lessee Building in order to provide services and amenities to its students, faculty, and staff . LESSEE may use the Lessee Building for other uses if such uses are approved by ISU, which approval shall not be unreasonably withheld or delayed and are not inconsistent with applicable Laws and zoning uses, as well as the terms of the Declaration and the teaching, research, service, or economic development mission of ISU.
    b. Subject to the rights and obligations of ISU hereunder, the operation of the Lessee Building, including allowing the use by others, will be the sole responsibility of LESSEE. The use and occupation of the Leased Premises and Lessee Building shall at all times during the term of this Ground Lease, be conducted in compliance with federal, state, and local laws, ordinances, and regulations (collectively, "**Laws**"). In the event that LESSEE receives written notice that LESSEE is not in compliance with any applicable Laws, LESSEE shall have thirty (30) days to cure such non-compliance, provided, however, if such non-compliance cannot reasonably be cured within such thirty (30) day period, LESSEE shall have the time necessary to reasonably cure the same) and if LESSEE fails to cure such non-compliance within such time frame, such non-compliance shall be deemed an event of default and shall be grounds for termination of this Ground Lease. Notwithstanding the foregoing, in no event shall LESSEE be responsible for any non-compliance with Laws arising out of the acts or omissions of ISU, its agent, employees, contractors and representatives.
    c. The CAA includes agreements and legal obligations that include the fiscal, fiduciary, and marketing relationship agreed upon by LESSEE and ISU; the rights retained by LESSEE; the rights retained by ISU; the branding issues; specification

of the services being provided by each entity to the other; specification that LESSEE is the final authority on the curriculum for LESSEE and the requirements for granting any degrees of students by LESSEE; the term of the CAA; a statement on how the CAA may be amended; a statement on how either party may withdraw from the CAA; and a statement of severability. In addition, LESSEE has the final authority on the selection of LESSEE students. LESSEE has the final authority on selection of faculty members. All agreements between ISU and LESSEE, including the CAA as well as this Ground Lease represent the legal relationship between ISU and LESSEE. Furthermore, LESSEE is solely responsible for meeting the American Osteopathic Association, Commission on Osteopathic College Accreditation (COCA) standards. ISU, if requested reasonably by COCA to provide documentation concerning ISU's finances and accreditation status, will transmit such documentation to COCA. LESSEE will have the sole responsibility to verify that LESSEE students are aware of financial responsibility and student rights with regard to Title IV and will also be solely responsible to verify that LESSEE students are aware that financial aid is not processed through ISU and they are not eligible to participate in Title IV through ISU. The term of this Ground Lease is over ten (10) years in length with at least five (5) years' notice of termination required prior to a party having the right to terminate this Ground Lease, except in an event of LESSEE's default and except for any express termination rights set forth in this Ground Lease. Notwithstanding the foregoing, LESSEE is required to give a minimum period of three (3) years for cancellation of any services affecting LESSEE students. Upon notice of termination of this Ground Lease, a teach-out plan must be submitted to the COCA by LESSEE or LESSEE must be able to immediately demonstrate a new location or lease to be approved by the COCA. Discontinuance of operations (except for any temporary closures due to casualty, condemnation or remodeling) and LESSEE's failure to commence operations following sixty (60) days written notice from ISU shall be an event of default and shall be grounds for termination of this Ground Lease.

d. LESSEE shall not provide or offer, directly, or through third parties, any new facilities, programs, or services, including but not limited to anatomy and physiology laboratories, without prior written approval from ISU, that would duplicate, infringe, or compete with current or planned health science academic or health science research programs and/or impact ISU's strategic planning for expansion of new, allied, or existing health science programs; provided, however, in no event shall this Section 5.d. limit or impact LESSEE's right to operate for the Permitted Use. Upon mutual, written agreement by the parties, LESSEE will have access to ISU facilities and services, such as the anatomy and physiology laboratories, necessary for its medical education.

6. <u>Accreditation and State Law Authorization.</u> LESSEE understands and acknowledges that

accreditation by the COCA is critical to the viability of this Ground Lease.

a. No building materials can be delivered to the Leased Premises and no construction or ground work can commence on the Leased Premises prior to a grant of pre-accreditation by the COCA. During the time of operation of the college of osteopathic medicine, LESSEE shall maintain its accreditation, as required, as a college of osteopathic medicine by the COCA (or any successor entity), and LESSEE shall comply with any applicable Laws for authorization to operate a college of osteopathic medicine in the State of Idaho. LESSEE shall notify ISU within thirty (30) days of receipt of any written notice or communications that shall materially and adversely affect its accreditation or reaccreditation or authorization to operate a college of osteopathic medicine. Subject to LESSEE's right to change its use in accordance with the terms of Section 5.a. of this Ground Lease, LESSEE's failure to maintain accreditation and/or authorization to operate a college of osteopathic medicine following any applicable notice and cure periods provided for under applicable Laws and/or set forth in this Ground Lease shall be an event of default and shall be grounds for termination of this Ground Lease.

7. Project Escrow. LESSEE must maintain escrow and operating reserves as required by COCA and as more particularly set forth on Exhibit E attached hereto. The failure to maintain such an escrow account following any applicable notice and cure periods provided for under applicable Laws and/or set forth in this Ground Lease shall be an event of default and shall be grounds for termination of this Ground Lease. LESSEE shall provide proof of such escrow to ISU listing the institution holding said funds and the amount of the escrow within thirty (30) days of creation of said escrow.

8. Due Diligence. LESSEE's obligations under this Ground Lease are contingent upon LESSEE either satisfying or waiving the conditions and contingencies hereinafter set forth (collectively, "**LESSEE's Conditions**") within the respective periods specified below. LESSEE shall diligently and in good faith pursue the satisfaction of LESSEE's Conditions. LESSEE's Conditions are as follows:

a. Within sixty (60) days after the Effective Date (the "**Inspection Period**"), LESSEE may, at LESSEE's sole cost and expense, inspect the Leased Premises and conduct any title examinations, investigations, engineering and environmental tests of the Leased Premises, as LESSEE deems necessary or advisable in connection with the leasing of the Leased Premises. LESSEE shall have the right, upon prior written notice to ISU given prior to the expiration of the Inspection Period, to either (a) terminate this Ground Lease, or (b) extend the Inspection Period for up to one (1) consecutive period of thirty (30) days. If LESSEE determines, in LESSEE's sole discretion, that the Leased Premises is not suitable for the purposes set forth in this Ground Lease, LESSEE shall have the right to terminate this Ground Lease by written notice to ISU given on or before the end of the Inspection Period, as the same may be extended, in which case this Lease shall be terminated and of no further force and effect and neither Party shall have any further rights, duties or obligations hereunder.

b. LESSEE shall have the right, during the Inspection Period, to obtain, at LESSEE's sole cost and expense, a commitment for title insurance ("**Commitment**") from a title company acceptable to LESSEE covering LESSEE's leasehold estate in an amount to be determined by LESSEE. together with copies of all liens, encumbrances and other matters affecting ISU's title to the Land ("Title Documents"). Further, LESSEE shall have the right during the Inspection Period to obtain at LESSEE's sole cost and expense, a survey of the Leased Premises in a form acceptable to LESSEE. If LESSEE determines, in LESSEE's sole discretion, following LESSEE's review of the Survey and the Commitment, that the Leased Premises is not suitable for the purposes of this Ground Lease, LESSEE shall have the right to terminate this Ground Lease by written notice to ISU given on or before the end of the Inspection Period, as the same may be extended, in which case this Lease shall be terminated and of no further force and effect and neither party shall have any further rights, duties or obligations hereunder.

9. <u>Condition of Land and Easements.</u>

a. ISU shall provide to LESSEE all reports, investigations, documents and data in ISU's possession or control regarding the soil, subsoil or environmental condition on ISU-Meridian. Except as expressly set forth herein, ISU makes no covenants or warranties respecting the condition of the soil or subsoil, any environmental condition or presence of cultural resources, or any other condition of the Leased Premises. All such tests shall be at LESSEE's expense. All costs necessary or required to make the Leased Premises suitable for development and any costs or expenses necessary to replace or repair any improvement due to the condition of the Leased Premises shall be at the sole cost of LESSEE. Notwithstanding anything to the contrary set forth in this Section 9, ISU represents and warrants to LESSEE, that as of the Effective Date, ISU has not received any written notice from a governmental agency of any uncured violations of any Laws (including environmental laws) affecting the ISU-Meridian and/or the Leased Premises, (ii) to ISU's actual knowledge (as defined below), no Hazardous Substances are stored by ISU on, in or under the ISU-Meridian and/or the Leased Premises in quantities which violate environmental laws, (iii) to ISU's actual knowledge, the ISU-Meridian and/or the Leased Premises is not used by ISU for the storage, treatment, generation or manufacture of any Hazardous Substances in a manner which would constitute a violation of applicable environmental laws, and (iv) to ISU's actual knowledge, the Premises do not contain Hazardous Substances which would constitute a violation of applicable environmental laws.

b. LESSEE may enter ISU-Meridian and the Leased Premises before the Lease Commencement Date to make soil and structural engineering tests which shall be at LESSEE's sole expense.

c. ISU, to the extent permitted by applicable Laws as grantor and in compliance with the Declaration, hereby grants to LESSEE, its respective contractors, employees, agents, licensees, and invitees, and the contractors, employees, agents, licensees, and invitees of such LESSEEs, for the benefit of the real property leased by LESSEE, as grantee, a nonexclusive easement for ingress and egress by vehicular and pedestrian traffic and vehicular parking upon, over, and across portions of the Common Area located within the Effective Land Area in accordance with all applicable provisions of the Declaration and subject to the additional limitations as described in Section 9.d.

d. At no time during the design, construction or operations of the Lessee Building and related site improvements, nor subsequent to the completion of such construction shall the LESSEE's operations cause any material restricted use or encumbered access to Common Areas within the Leased Premises nor within the Effective Land Area of the property owned by either ISU or the West Ada School District. Construction fencing, staging and construction operations must be confined to the area within the perimeter boundary of the Effective Land Area, as shown in Exhibit D or be conducted off the Effective Land Area.

e. ISU's future design, construction or operations of planned expansion and related site improvements, shall not cause any restricted use or encumbered access to Common Areas within the LESSEE's Leased Premises.

f. Subject to the restrictions and requirements affecting the Common Areas, at LESSEE's request or as may be reasonably required, ISU shall grant to public entities or public service corporations, for the purpose of serving the Leased Premises, rights-of-way or easements on or over ISU-Meridian, the Leased Premises, and adjacent property owned by ISU for telephone, electricity, water, sanitary or storm sewers or both, and for other utilities and municipal or special district services. Grants made under the authority of this provision shall be consistent with existing and necessary services. ISU shall have the right to deny any requested easements that materially and adversely interfere with the development of other ISU property, provided, however, that ISU must provide alternative easement for the benefit of LESSEE.

10. Bonds. Before commencing the initial construction of the Lessee Building and before commencing any alteration, addition, or improvement where the estimated cost of such

alteration, addition or improvement shall be one hundred fifty thousand ($150,000) or more, defined as a "**Material Alteration**", LESSEE shall require all contractors to provide eighty-five (85%) payment and performance bonds in accordance with Title 54, Chapter 19, Idaho Code. All surety company bonds shall guarantee the completion of the construction in accordance with Construction Documents approved by LESSEE and ISU, and guarantee the payment of the cost of such construction. The bond must be in a form reasonably acceptable to the ISU and issued by a surety licensed to conduct business in Idaho. If the State accepts a performance and/or payment bond that is obtained by a construction contractor or other entity different from the LESSEE, and that bond(s) does not name the State in a way to allow the State to demand surety performance under the bond(s), then LESSEE shall reasonably cooperate with the State to the fullest extent possible to obtain the complete protection for the project that the bond(s) is intended to provide.

11. Insurance During Initial Construction. Prior to the initial construction of the Lessee Building, and prior to any Material Alteration of the Lessee Building on the Leased Premises:
    a. LESSEE shall cause to be maintained with responsible insurers, at LESSEE's expense, builder's risk insurance (fire with extended coverage and vandalism endorsement) in an amount not less than one hundred percent (100%) of the anticipated value of the Lessee Building as completed;
    b. LESSEE or any contractor or contractors employed by LESSEE or any other person who will perform work on or install the equipment in the Lessee Building shall be fully covered by worker's compensation insurance as required under the Idaho Worker's Compensation Act, and all certificates of worker's compensation insurance shall be furnished to LESSEE and ISU before commencement of any construction;
    c. LESSEE or any contractor or contractors employed by LESSEE or any other person who will perform work on or install the equipment in the Lessee Building shall be covered by liability coverage with minimum limits of one million dollars ($1,000,000) per occurrence, and two million dollars aggregate with an additional insured endorsement in favor of ISU and the State of Idaho.
    d. By requiring insurance herein, ISU does not represent that coverages and limits will necessarily be adequate to protect LESSEE or any contractor or contractors employed by LESSEE. Such coverage and limits shall not be deemed as a limitation on the LESSEE'S liabilities under any of the indemnities granted in the Ground Lease.

12. Construction and Completion of Work.
    a. Prior to ISU's approval of the Plans, LESSEE shall, at no material cost or expense to LESSEE, reasonably include ISU in its design process, from preliminary concepts through the final design of the Plans.

b. LESSEE, coincidental with its submittal to Meridian City, shall submit to ISU for ISU's approval, which approval shall not be unreasonably withheld, conditioned or delayed, all Construction Documents and a complete set of construction plans and specifications for the Lessee Building and all material improvements, including material supplements and changes thereto (collectively, the "**Plans**") prepared by a licensed architect or engineer, which plans and specifications may include, copies of preliminary grading and drainage plans; soil test reports; descriptions of utilities, sewer and service connections; locations of ingress and egress to and from public thoroughfares; curbs; gutters; parkways, street lighting, designs and locations for outdoor signs; storage areas; building plans, elevations, and renderings; landscaping plans; parking stalls; and the architect's estimate of the costs of construction, all reasonably sufficient to enable ISU to make an informed judgment about the nature, design, and quality of the proposed Lessee Building and improvements. ISU shall have a period of thirty (30) days after submission of the Plans, together with a written statement of LESSEE that it deems the same complete and requests approval thereof, to advise LESSEE in writing of its approval, disapproval, or request for supplementation, amendment, or clarification of said Plans. ISU shall have the right to disapprove the Plans. Further, in the event that LESSEE materially changes or supplements the Plans, LESSEE shall provide written notice of such material change to ISU and ISU shall have five (5) business days to advise LESSEE in writing of its approval or disapproval of said modification. Two (2) hard copies and two (2) electronic copies of the Plans shall be submitted to ISU within seven (7) months of execution of this Ground Lease. One copy shall be attached hereto as Exhibit F. Failure of ISU to respond to LESSEE regarding (i) the Plans within thirty (30) days shall be deemed ISU's approval of the Plans and (ii) any material modification to the Plans within five (5) business days shall be deemed ISU's approval of such modification.

c. Fire lane extensions for Fire Department access, ADA accessible parking stalls, drop off areas, and screened trash enclosures must be provided within the Effective Land Area to serve the Lessee Building and be in compliance with applicable Laws.

d. Accessible pedestrian connectivity between the Lessee Building and the ISU campus must be included in the building and site design. The accessible pedestrian walkway must locate within the existing landscape parkway along the southern boundary of the Leased Premises so that no part of the current Common Area ingress/egress or Common Area parking are used for the proposed accessible pedestrian route.

~~e~~. LESSEE shall provide ISU with written notification of its intention to commence development of the Lessee Building at least ten (10) business days before commencement of any such work to the Leased Premises or delivery of any materials to the designated staging area.

f. LESSEE shall furnish ISU with a true copy of LESSEE's executed contract with the general contractor, who is appropriately licensed in the State of Idaho with any confidential or proprietary information redacted. The construction contract shall give ISU the right, but not the obligation, to assume LESSEE's obligations and rights under the contract if LESSEE should be in default past any applicable notice and cure periods therein, and such default is not waived by the contractor or otherwise cured within the applicable time frame set forth in such construction contract. The contract shall also require the general contractor to copy ISU upon any notification of LESSEE's default past any applicable notice and cure periods.
g. LESSEE shall furnish ISU with a list of all major subcontractors who will be involved in the construction of the Lessee Building.
h. ISU hereby grants to LESSEE a right to enter upon ISU-Meridian and to construct, at its own cost and expense, the Lessee Building as described in the Construction Documents. In addition to constructing the Lessee Building, LESSEE shall, at its own cost and expense, ensure that all other improvements, including parking areas, common lighting, and landscaping built by or on behalf of LESSEE on the Leased Premises, are in accordance with applicable Laws affecting the Leased Premises.
i. LESSEE shall comply with, and shall cause its contractors and subcontractors to comply with, all applicable Laws, including, without limitation, those Laws pertaining to licensing and permitting, public works, building construction, building codes, employment, and conditions and hours of employment.
j. All construction shall comply with the Declaration regarding staging areas, construction parking, and plans to ensure the safety of all faculty, staff, and students of ISU and the school district. Construction shall not materially and adversely interfere with the on-going business of ISU and the school district.
k. All defects, deficiencies, errors, and omissions associated with the construction, reconstruction, or repair of the Lessee Building rests solely upon LESSEE to the extent the same are not caused by the acts or omissions of ISU, its employees, contractors, agents, representatives or invitees, and all costs to correct the same shall be paid by LESSEE.
l. Once the work has begun, LESSEE shall, with reasonable diligence, prosecute to completion all construction of the Lessee Building, subject to conditions of Unavoidable Delay.
m. LESSEE shall provide to ISU a schedule of all on-site testing and inspections, including independent testing firms and government agencies (e.g., soil compacting, concrete tests, etc.). LESSEE shall provide to ISU, within fifteen (15) business days of its receipt thereof, copies of the results of all said

testings and inspections. LESSSEE shall notify ISU of any significant deviations from the schedule. In the event of any finding by ISU that construction materials or workmanship are not in substantial accordance with the Plans, LESSEE shall immediately cease such unauthorized work and repair or replace such items.

n. If LESSEE shall not have completed the construction of the Lessee Building on the Leased Premises by the date that is thirty-six (36) months following the Effective Date (as the same may be extended by any Unavoidable Delay, the "**Date of Completion**") in accordance with the Construction Documents, unless caused by Unavoidable Delay, ISU has the option to, at its sole discretion and as its sole and exclusive remedy, with ten (10) days written notice, terminate this Ground Lease.
o. If construction is not completed because of Unavoidable Delay or because LESSEE has not obtained accreditation from COCA, the Parties shall work together to amend this Ground Lease, in writing, with a new Date of Completion.
p. During the term of this Ground Lease, LESSEE may, but shall not be obligated to, construct additions or make alterations to the Leased Premises. Notice of any Material Alterations shall be provided to ISU at least ninety (90) days prior to any solicitation of bids for construction of the Material Alteration. All Material Alterations shall be made in accordance with the terms of this Ground Lease and the applicable provisions of the Declaration and all costs shall be paid by LESSEE. No Material Alteration shall materially and adversely impair the ability of ISU to further develop ISU-Meridian. ISU may, at its reasonable discretion, disapprove any such Material Alteration. LESSEE shall have the right to make Minor Alterations to the Leased Premises and the Lessee Building in accordance with the applicable provisions of the Declaration without the prior written consent of ISU. "**Minor Alterations**" means any alterations, improvements or additions constructed by or on behalf of LESSEE that are not a Material Alteration.
q. During the term of this Ground Lease, LESSEE shall maintain and keep current accurate "as-built" drawings, which may include hand-drawn modifications to existing drawings.
r. Fee title to the Lessee Building, together with all additions, alterations, and improvements thereto, constructed on the Leased Premises, even though a part of the realty, shall be and remain in LESSEE name during the term of this Ground Lease.
s. LESSEE shall not purchase any property surrounding ISU-Meridian that would limit the future growth of ISU-Meridian unless the Parties agree to such purchase in writing that is signed by the proper authority of each Party.
t. LESSEE shall defend, indemnify, and hold ISU and the State of Idaho harmless

from any and all liability, claims, damages, expenses (including reasonable attorney's fees and costs), liens, claims of lien, judgments, proceedings, and causes of action, arising out of or in any way connected with the construction of the Lessee Building, unless caused by the negligent or willful act or omission of ISU, its agents, contractors, or employees.

u. To the extent allowed by law, ISU shall defend, indemnify, and hold LESSEE harmless from any and all liability, claims, damages, expenses (including reasonable attorney's fees and costs), liens, claims of lien, judgments, proceedings, and causes of action, arising out of or in any way connected with (i) ISU's breach of its obligations under the Declaration and/or this Ground Lease and/or (ii) the acts and omissions of ISU, its agents, contractors or employees, unless caused by the negligent or willful act or omission of LESSEE, its agents, contractors, or employees.

13. <u>LESSEE's Insurance After Initial Construction.</u> After the Lessee Building has been constructed and written notice of substantial completion is delivered to LESSEE and ISU, LESSEE shall, during the term of this Ground Lease and the subsequent renewal terms of this Ground Lease, if any, maintain through a responsible insurer(s) licensed to do business in Idaho, at LESSEE's sole expense, the following insurance coverages:

a. Fire and extended coverage insurance in an amount equal to at least one hundred percent (100%) of the full replacement cost of the Lessee Building;
b. Worker's compensation insurance for all employees and staff of LESSEE, insuring against claims under the Idaho Worker's Compensation Act; and
c. Premises liability coverage in an amount of one million dollars ($1,000,000) per occurrence, two million aggregate with an additional insured endorsement in favor of ISU and the State of Idaho.
d. The insurance policies shall not be subject to cancellation except upon at least thirty (30) days' prior written notice to ISU. If LESSEE fails to comply with any insurance requirements set forth in this Ground Lease, ISU may obtain insurance and keep it in effect, and upon demand, LESSEE shall pay ISU its actual, out of pocket cost of procuring such insurance.
e. By requiring insurance herein, ISU does not represent that coverages and limits will necessarily be adequate to protect LESSEE. Such coverage and limits shall not be deemed as a limitation on the LESSEE'S liabilities under any of the indemnities granted in the Ground Lease.

14. <u>Repairs/Maintenance/Security.</u> Except for any maintenance or repair obligations of ISU under the Declaration, LESSEE shall have sole responsibility to maintain or caused to be maintained the Lessee Building and all improvements within the Leased Premises in good and clean condition and repair, ordinary wear and tear excepted, said maintenance to include, without limitation, the following:

a. Maintaining all exterior site improvements, including fences and gates;
b. Maintaining, repairing, resurfacing, and restriping, when reasonably necessary, in accordance with the Declaration, all paved surfaces in a level, smooth, and evenly covered condition with the type of surfacing material originally installed or such substitute as shall in all material respects be equal or superior in quality, use, and durability;
c. Maintaining, repairing, and replacing general building structure and related equipment (interior and exterior), including tuck-pointing, painting and caulking as reasonably needed, as determined by LESSEE;
d. Removing substantially all snow, papers, debris, filth, and refuse, and reasonably sweeping the area to the extent reasonably necessary to keep the area in a clean and orderly condition;
e. Operating, maintaining, repairing, and replacing, when necessary, as reasonably determined by LESSEE, the heating, cooling, and air handling systems and related equipment, including filter replacement, routine service, and monitoring air quality and comfort standards;
f. Operating, maintaining, repairing, and replacing, when necessary, as reasonably determined by LESSEE, electrical systems and related equipment;
g. Sewer and plumbing systems and related equipment shall be maintained in a safe, sanitary, and functional condition. Stacks, vents, and lines shall be kept substantially free from obstructions, leaks, and defects. The water supply shall be maintained substantially free from contamination;
h. Operating, maintaining, repairing, and replacing, when necessary, as reasonably determined by LESSEE, the roof, flashing, gutters, and drains.
i. Operating, maintaining, repairing, and replacing, when necessary, such exterior lighting facilities as shall be reasonably required, as reasonably determined by LESSEE, plus seasonal adjustment of timers. Exterior lighting shall include landscaped areas, parking areas, building exterior lights, walkways, and delivery areas;
j. Maintaining, repairing, and replacing, when necessary, as reasonably determined by LESSEE, all directional signs, markers, and lines;
k. Operating, maintaining, repairing, and replacing, when necessary, as reasonably determined by LESSEE, fire sprinkler system, including fire extinguishers and smoke detectors;
l. Maintaining all landscaped areas, and maintaining, repairing, and replacing, when necessary, as reasonably determined by LESSEE, automatic sprinkler systems and water lines; and replacing shrubs and other landscaping as necessary, as reasonably determined by LESSEE;
m. All maintenance and service of equipment shall be performed by a licensed firm. LESSEE shall use commercially reasonable efforts to endeavor that all maintenance and service providers shall comply with OSHA requirements,

including wearing of protective clothing and following MSDS procedures.

n. The LESSEE shall provide re-certification of life safety equipment including, without limitation, the building fire detection and fire suppression systems in accordance with applicable Laws. Additionally the LESSEE shall have elevators inspected by a licensed provider as required by applicable Laws. If requested by ISU, copies of each re-certification shall be provided to the ISU within thirty (30) days of such applicable written request.
o. Maintaining, repairing, and replacing, when necessary, all storm drains, sewers, and other utility lines and facilities located on the Leased Premises and not dedicated to the public or conveyed to any public or private utility which are necessary for the operation of the Lessee Building;
p. Employing security personnel as deemed appropriate by LESSEE.

Notwithstanding the foregoing, ISU, at ISU's sole cost and expense, covenants and agrees to perform its obligations under the Declaration. ISU hereby acknowledges and agrees that in no event shall LESSEE be responsible for any fees, charges, expenses, or assessments under the Declaration and that ISU shall pay for the same as required by the Declaration.

15. Maintenance Plan, Maintenance Records and Inspections. LESSEE acknowledges and agrees to prepare and implement, during the term of this Ground Lease and to the extent the same is required by applicable Laws, a preventative maintenance and service program for the interior and exterior of the Lessee Building (the "**Maintenance Plan**"), which Maintenance Plan shall be acceptable to LESSEE's investors and lenders. The Parties agree to meet periodically, at a minimum, annually, to review this Ground Lease, and any property and maintenance issues. LESSEE shall deliver a copy of the Maintenance Plan to ISU at this meeting. The Maintenance Plan may cover, as required by applicable Laws, the inspection, service and repair of the Lessee Building, including, without limitation, the following:
    a. The heating and cooling system, including safety devices, water treatment, lubrication, alignment, gaskets, calibration, filter replacement, cleaning, adjustments, coil cleaning, damper cleaning and adjustment, and pressure readings.
    b. The plumbing systems, including water quality, running water, leaks, drains, cleanliness, and roof drains. Ground depressions over sewer lines shall be repaired immediately.
    c. The electrical systems, including monthly amp draws or bi-annual infrared scanning of electrical system to detect any overload conditions and monthly exterior lighting inspection in the evenings. A schedule of timer adjustments shall be established to account for seasonal changes.
    d. The roof, including monthly assessment of conditions, in addition to special

inspections after snow, hail, or heavy winds. Inspections to watch traffic patterns of maintenance/service people on roof, to alleviate standing moisture, blisters, debris on roof, leaks, loose flashings, gutters and downspouts and to check to see if roof equipment is securely fastened and clean. Roof drains shall be cleaned on a reasonable basis. Repairs shall be made in accordance with roof warranty provisions.

e. The paved areas, to correct any ponding, sprinkler run-off, pothole issues. If pavement issues are a concern in dumpster or delivery areas, concrete pads shall be considered. Routine maintenance of asphalt such as crack filling, re-sealing, and re-striping shallbe completed as reasonably necessary, as determined by LESSEE.
f. The fire safety system, to recharge all fire extinguishers, test fire alarms and pull boxes as required by applicable Laws. A fire sprinkler firm must perform an testing of the fire sprinklersystem as required by applicable Laws.
g. All doors, including the adjustment of door closers.
h. Projection of timing of carpeting, flooring, and furniture, fixtures, and equipment replacement, in addition to future capital improvement projects. Exterior building joints, glazing and caulking windows, mildew, trip hazards, overhead door adjustment, and lubrication.
i. The fencing and gates.
j. Performance of any touch-up painting, especially on bare wood and exposed metals.
k. Recommendations to increase building efficiency by decreasing utility consumption or by implementing additional energy management procedures.
l. An inspection shall also be made of all electric motors, transmission and drive systems, laboratory equipment, and water consuming systems as required by applicable Laws.
m. Maintenance of warranty records and established service schedules that substantially comply with warranty and manufacturer's guidelines. LESSEE shall use commercially reasonable efforts to keep all instruction manuals for all installed equipment, including maintenance guides and parts lists. LESSEE shall maintain and keep current all plans and specifications.
n. LESSEE will schedule inspections of the Lessee Building during the term of the Ground Lease as required by applicable Laws.
j. The building authority having jurisdiction and the Idaho State Fire Marshal shall inspect the Lessee Building as required by applicable Laws. The LESSEE shall provide copies of each inspection report to ISU within thirty (30) days of inspection date. LESSEE shall comply promptly with any actions required by these entities.

16. <u>Failure to Repair, Maintain or Service</u>. In the event that the LESSEE shall fail or refuse to make such repairs, perform such maintenance, provide such services, or to take any other action

required of the LESSEE under this Ground Lease, ISU shall give LESSEE reasonable notice and time to cure and, failing such cure, ISU may, at its option, make such repairs, perform such maintenance, provide such services, or take any such action, and recover such reasonable sums expended directly from the LESSEE upon presentation of an invoice. ISU's decision to exercise this remedy shall not be deemed to limit its exercise of any other remedy available under this Ground Lease, at law or in equity.

17. Utilities. LESSEE hereby covenants and agrees to pay all charges for heat, light, gas, telephone, trash service, telecommunications services, water, and sewer, and for all other public or private utilities which shall be used in or charged against the Lessee Building during the term of this Ground Lease, including any hookup or installation charges, whether or not the same constitute liens.

18. Destruction of Leased Premises or Lessee Building.
    a. In the event the Leased Premises or the Lessee Building shall be damaged or destroyed during the term of this Ground Lease by fire or any other casualty, LESSEE may, at LESSEE's sole option, elect to continue this Ground Lease in effect and shall cause the damaged portion of the Leased Premises or Lessee Building to be repaired and restored to substantially the same condition which existed before any fire or other casualty. Should LESSEE exercise its option to continue this Ground Lease and to restore the Leased Premises or Lessee Building, LESSEE shall be entitled to apply all or any portion of insurance proceeds owed to it toward repair and restoration of the Leased Premises or the Lessee Building and shall proceed with due diligence to restore and reconstruct the Leased Premises and LESSEE Building.
    b. In the event LESSEE doesn't exercise its option to continue this Ground Lease upon the occurrence of damage to or destruction of the Leased Premises or Lessee Building by fire or other casualty, then LESSEE may, at LESSEE's sole option, declare this Ground Lease terminated. In such event, all obligations to perform the covenants of this Ground Lease shall terminate, and all insurance proceeds payable with respect to such loss shall be applied first to the cost, in an amount not to exceed $500,000, of demolition of the remaining improvements and restoration of the real property to substantially the same condition existing as of the commencement of this Ground Lease, with the balance of insurance proceeds, if any, to be paid to LESSEE and/or its lenders.

19. Eminent Domain.
    a. If the entire Leased Premises or Lessee Building shall be taken by condemnation or right of eminent domain, or conveyed in lieu thereof, or, in the event such portion of the Leased Premises or such portion of the Lessee Building shall be so taken or conveyed that prohibits or substantially impairs

LESSEE's use, LESSEE shall give notice to such effect, then, in either or such events, this Ground Lease shall be terminated as of the date possession of the property is taken by the condemning authority.

b. However, if a portion of the Leased Premises is taken by condemnation or right of eminent domain, or conveyed in lieu thereof, and this Ground Lease is not terminated by LESSEE as set forth in Section 19(a) above, this Ground Lease shall remain in effect. In the event a partial taking occurs and this Ground Lease is not terminated by LESSEE as set forth in Section 19(a) above, LESSEE shall make such alterations or repairs, at LESSEE's own cost and expense or from any insurance proceeds, as applicable, as are necessary to make the Leased Premises or Lessee Building usable by LESSEE.
c. LESSEE shall be entitled to LESSEE's part of any award and payment for the taking by condemnation or right of eminent domain or conveyance in lieu thereof of the Leased Premises or Lessee Building. ISU shall be entitled to ISU's remainderman interest of any award and payment for the taking of the Leased Premises or Lessee Building by condemnation or right of eminent domain or conveyance in lieu thereof to the extent the same does not diminish LESSEE's award. LESSEE shall be entitled to make a claim to the condemning authority for a separate award for damage to LESSEE's Building and interest, including, without limitation, any relocation expense.
d. Nothing contained herein shall prevent ISU and LESSEE from prosecuting claims in any condemnation proceedings, or filing a collateral claim or action if such Party is not named as a Party in the proceeding, for the value of all of their respective interests, provided, however, in no event shall ISU's claim reduce the proceeds or award due and owing LESSEE.

20. <u>LESSEE's Assignment or Transfer of Interest.</u> LESSEE shall not assign or sublease its interest in this Ground Lease without the prior written approval of ISU, which consent and approval shall not be unreasonably withheld, conditioned or delayed. Notwithstanding the foregoing, Lessee shall have the right, without ISU's prior consent, (i) to assign the Lease to any Affiliate (as defined below) of LESSEE or (ii) to mortgage or collaterally assign its leasehold interest and its interest in the Lessee Building and other improvements constructed on the Leased Premises (each, a "**Permitted Transfer**"). For the purposes of this Section 20, an "Affiliate" shall be any entity that (a) is controlled by, controlling or under common control of LESSEE and (ii) has a reasonable amount of experience and knowledge in operating a business for the Permitted Use. Except for a Permitted Transfer, the factors to be considered by ISU in granting or withholding its consent and approval to the proposed assignment or sublease are limited to (i) the assignee's or sublessee's financial condition; and (ii) a determination of whether the assignee's or sublessee's proposed use is consistent with the restrictions of Section 5 of this Ground Lease. LESSEE shall bear the burden and expense of establishing that the

proposed assignee or sublessee satisfies the foregoing criteria.

21. <u>Liens.</u> LESSEE shall not permit any mechanic's, materialmen's, or other lien, encumbrances, consensual liens, to attach to the Lessee Building, Leased Premises, or ISU-Meridian. In the event that any such mechanic's, materialmen's, or other liens are filed against the Leased Premises, the Lessee Building, or ISU-Meridian by reason of actions of LESSEE, LESSEE shall cause all such liens to be discharged by payment, bond, or otherwise within sixty (60) days after LESSEE has knowledge of or receives written notice of the filing of such liens or security interests. LESSEE shall defend, indemnify, and hold ISU and the State of Idaho harmless from any and all liability, claims, damages, expenses (including reasonable attorney's fees and costs), liens, claims of lien, judgments, proceedings, and causes of action, arising out of or in any way connected with the construction of the Lessee Building, unless caused by the negligent or willful act or omission of ISU, its agents, contractors, or employees.

22. <u>Telephone.</u> LESSEE shall be responsible for the installation, alterations, repair, or maintenance of all telephone and telephone systems, and all other telecommunication systems, including wiring, to the Lessee Building.

23. <u>Exterior Signs.</u> LESSEE may install upon the exterior of the Lessee Building or the grounds surrounding the Lessee Building, such signs and displays as LESSEE shall deem advisable; provided, all such signs and displays shall be in compliance with all applicable laws, rules, covenants, and regulations and shall be subject to the prior written approval by ISU. Signage cannot unduly impact or diminish the image and/or visibility of the ISU-Meridian Health Center. LESSEE should provide all graphic presentations, shop drawings, and final signage design for ISU's approval. The signs or displays shall be limited to designating the Lessee Building name and parking and traffic control signs.

24. <u>Taxes and Assessments.</u>
    a. LESSEE shall, if necessary and as required by applicable Laws, pay any personal property taxes which may be assessed, if any local taxing authority may assert such authority. It is the understanding of the Parties hereto that ad valorem real property taxes and other assessments levied and assessed against the Leased Premises or Lessee Building shall not be payable, due to the ownership interest of ISU in the Leased Premises. However, if for any reason any type of real estate taxes are levied against the Leased Premises or Lessee Building, LESSEE shall reimburse ISU the amount of any real estate taxes so levied and assessed. Any reimbursement due ISU hereunder shall be paid within thirty (30) days after delivery to LESSEE of copies of the tax bills evidencing the assessment of such taxes reimbursable under this Section 24. ISU agrees to pay, when due, before delinquency, directly to the tax collecting authority, all

taxes and assessments levied and assessed against the Leased Premises. In the event ISU fails to pay such taxes and assessments when due, LESSEE shall have the right, but not the obligation, to pay the same directly to the taxing authority.

b. In the event ad valorem real property taxes are levied and assessed against the Leased Premises or Lessee Building, LESSEE, at LESSEE's expense, shall have the right to contest the amount or validity of all or any part of the ad valorem real property taxes and assessments required to be paid by ISU hereunder; provided, however, LESSEE shall indemnify ISU against any loss or liability by reason of such contest. Notwithstanding such a contest, all taxes otherwise due and payable to ISU by LESSEE shall be paid within thirty (30) days of written demand, but any refund thereof by the taxing authority shall be the property of LESSEE. ISU and LESSEE agree to assist each other as may be reasonably necessary in any contest of ad valorem real property taxes and assessments.

c. LESSEE shall be required to reimburse ISU within thirty (30) days of written demand for any and all taxes and other charges payable by ISU to any governmental entity (other than income, capital levy, estate, succession, inheritance or transfer taxes or similar tax of ISU) whether or not now customarily paid or within the contemplation of the Parties hereto, by reason of or measured by any and all taxes levied or assessed and which become payable during the term of this Ground Lease upon any of LESSEE's property or LESSEE's income derived from the Leased Premises. The Parties acknowledge and agree that ISU shall be responsible for any and all income, profits or revenue tax, assessment or charge imposed upon the rent or other benefit received by ISU under this Ground Lease.

25. <u>Compliance With Laws and Regulations.</u>

a. LESSEE shall, at its own cost and expense, promptly comply with, or cause to be complied with, all Laws, whether or not the same require structural repairs or alterations, which may be applicable to LESSEE, the Leased Premises or the Lessee Building or the use of or manner of use of the Leased Premises or the Lessee Building. This provision specifically includes LESSEE's obligation to comply with all statutes, rules, and regulations regarding the handling, storage, and disposal of any hazards or regulated substance used by LESSEE on the Leased Premises. LESSEE shall also observe and comply with the requirements of all policies and arrangements of insurance that LESSEE is required to carry under this Ground Lease.

b. LESSEE shall defend, indemnify, and hold ISU and the State of Idaho harmless from any and all liability, claims, damages, expenses (including reasonable attorney's fees and costs), judgments, proceedings, and causes of action, arising out of or in any way connected with the failure to comply with applicable Laws, unless the same is caused by the negligence or willful acts or omissions of ISU, its employees, agents, contractors or representatives.

26. Hazardous Materials.

a. LESSEE shall not accumulate, use, or store on the Leased Premises, Hazardous Substances or materials classified as hazardous, biomedical, or toxic waste, except in compliance with all applicable Laws. LESSEE shall comply with any lawful order by an entity reposed with authority to regulate the use, accumulation, storage, or disposal of a Hazardous Substance.
b. LESSEE will comply with all reporting requirements and applicable Laws for Hazardous Substances. LESSEE will provide copies of applicable MSDS sheets to ISU and the Meridian Fire Department. LESSEE shall work with ISU, the Meridian Fire Department, and any other local emergency planners on appropriate response planning.
c. LESSEE agrees to indemnify and hold harmless ISU and the State of Idaho, its agents, employees, contractors, experts, licensees, and affiliates from any and all environmental claims, damages, fines, judgments, penalties, costs, liabilities, or losses, including, without limitation, any and all sums paid for settlement of claims, court costs, attorney's fees, consultant fees, and expert fees, arising during or after the term of this Ground Lease from or in connection with the presence or suspected presence of Hazardous Substances in or on the Leased Premises, unless the Hazardous Substances are present as a result of the negligence, willful misconduct, or other acts of ISU, its agents, employees, contractors, or invitees. Without limitation of the foregoing, this indemnification shall include any and all costs incurred due to any investigation of the site or any cleanup, removal, or restoration mandated by a federal, state, local agency, or political subdivision.
d. To the extent allowed by law, ISU shall indemnify, protect, defend and hold LESSEE harmless from and against any and all orders, penalties, fines, administrative actions, or other proceedings (collectively, a "**Compliance Obligation**") commenced by any governmental agency including, without limitation, the United States Environmental Protection Agency, as a result of the existence of any environmental condition in violation of an environmental law that (i) exists as of the Effective Date, on, under or at the Leased Premises or (ii) results from ISU or ISU's agents, contractors or employees releasing, generating, or disposing of any Hazardous Substances in, on, or about the Leased Premises in violation of any environment laws, except to the extent that such environmental condition is caused or aggravated by the act or omission of LESSEE, its agents, contractors, servants, employees, customers or invitees.

27. Zoning and Building Restrictions. It is understood and agreed that this Ground Lease is subject to all applicable zoning ordinances and restrictions and all limitations of record and is subject to any and all easements for public utilities which are of record. If there are any such restrictions which make construction of the Lessee Building unfeasible in the opinion of the Parties, the Parties may mutually terminate this Ground Lease. All construction, parking, or signage shall conform to any applicable zoning or building regulations.

28. Waste and Nuisance Prohibited. LESSEE shall not commit or suffer to be committed any waste or any nuisance on the Leased Premises or on the remainder of ISU-Meridian.

29. Waiver of ISU's Lien. ISU hereby waives any lien on LESSEE's personal property, including, without limitation, any furniture, furnishings or equipment on the Leased Premises, whether granted by statute or otherwise.

30. Mortgage Financing.

    a. Leasehold Mortgages and Encumbrances; Leased Fixtures. LESSEE shall have the right, without the consent of ISU, to mortgage, collaterally assign or otherwise encumber any interest that LESSEE has in this Lease, the Building or any other improvements on the Leased Premises, including, without limitation, its leasehold interest or any part thereof, as collateral security for financing, provided that (i) LESSEE shall remain liable for performance of all of its obligations under this Ground Lease, and (ii) any financing obtained by LESSEE for the Lessee Building and/or any other improvements may not, without the written consent of ISU, which consent shall not be unreasonably withheld, conditioned or delayed, exceed the value of the Lessee Building and other improvements at the time such financing is obtained, or the term of this Ground Lease. Notwithstanding the foregoing, any Mortgage shall only be upon LESSEE's leasehold estate hereunder and LESSEE's interest in this Ground Lease, the Building and any improvements and shall not encumber ISU's fee simple title to ISU-Meridian.

       The term "**mortgage**", when used in this Section, shall include, without limitation, leasehold mortgages and deeds of trust; the term "**mortgagee**" shall include, without limitation, a mortgagee under a mortgage or the trustee or beneficiary of a deed of trust, but only those whose names and addresses have been furnished in writing to ISU; and the term "**foreclosure**" shall include, without limitation, judicial or non-judicial foreclosure, sale upon default under nonjudicial powers of sale, and conveyances or assignments in lieu of foreclosure. Provided that ISU shall have been furnished with a true and correct copy of the mortgage (and any and all amendments or modifications thereto) meeting the requirements of this Section 30(b), the name and address of the mortgagee, and the date of recording of the mortgage, until ISU receives notice that the mortgage has been satisfied or released, the following provisions shall apply.

(i) Upon and during the occurrence of any LESSEE default under any mortgage past the applicable notice and cure period, ISU may, in its sole discretion, within ninety (90) days of receipt of a notice of mortgage default from the mortgagee, take whatever action is necessary to cure the LESSEE's default, or undertake, in good faith, to cure the default if the default is not of a nature as can be cured within ninety (90) days, with like effect as if LESSEE had cured or undertaken cure of the default. LESSEE shall indemnify ISU for all actual, out-of-pocket costs and expenses incurred in curing the default.

(ii) No Termination By Reason of Sale, Forclosure or Surrender. So long as the mortgagee pays all rent due and otherwise complies with LESSEE's obligations under this Ground Lease in accordance with the terms and conditions to cure any default contained in this paragraph including payment of any rent due and owing by LESSEE, this Ground Lease shall not be subject to termination by ISU by reason of foreclosure or by resort to any remedy for default under or pursuant to a mortgage. No sale or transfer of the Leased Premises or ISU's interest in this Ground Lease, or any portion thereof, to the LESSEE and no purchase or other acquisition of this Ground Lease, or any interest herein or in the Lessee Building and improvements, by ISU, shall terminate this Ground Lease by merger or otherwise and this Ground Lease shall continue in full force and effect notwithstanding any such transfers so long as any mortgage encumbers the LESSEE's leasehold interest. Except with respect to provisions of this Ground Lease not material to the security of any mortgagee, this Ground Lease may not be amended or any provision of this Ground Lease waived by ISU or the LESSEE without the prior written consent of each mortgagee and any such amendment or waiver made without the prior written consent of each mortgagee may be declared void and of no force or effect by the mortgagee. Consent to amendment or waiver may only be withheld by such mortgagee if such amendment or waiver would impair its security interest.

(iii) No Voluntary Cancellation. So long as a mortgage is in effect, ISU shall not accept a surrender, cancellation or other voluntary termination of this Ground Lease by the LESSEE without the prior written consent of all mortgagees of record, unless upon such surrender or cancellation ISU expressly assumes the LESSEE's oblibations under such mortgages or, if such termination is on account of a default by the LESSEE of the Ground

Lease hereunder, and ISU has given each mortgagee of record the opportunity to exercise its rights as provided in this Section 30.

(iv) Right of Mortgagee on Default. No act or failure to act on the part of the LESSEE which would entitle ISU under the terms of this Ground Lease, or by law, to be relieved of ISU's obligations hereunder or to terminate this Ground Lease, shall result in a release or termination of such obligations or a termination of this Ground Lease as to any mortgagee unless:

(A) Notice. ISU shall have first given written notice of the LESSEE's act or failure to act to each such mortgagee, specifying the act or failure to act on the part of the LESSEE to the address of the mortgagee last supplied to ISU by such mortgagee; and

(B) No Cure. Such mortgagee, after receipt of such notice (i) has failed or refused to correct or cure the condition complained of within the time permitted the LESSEE hereunder, plus an additional thirty (30) days thereafter in the case of default consisting solely of a failure to pay a sum of money due from the LESSEE to ISU, or required to be paid by the LESSEE under this Ground Lease; (ii) in the case of any other default by the LESSEE hereunder, other than an Uncurable Default (as defined below) has failed or refused to correct or cure the condition complained of within the time permitted by the Ground Lease plus and additional thirty (30) days; or (iii) has failed, in the case of a default by LESSEE which by its nature cannot be cured or corrected by mortgagee (an "**Uncurable Default**"), including, without limitation, LESSEE's bankruptcy or insolvency, to lawfully assume possession of the Leased Premises within a reasonable time (as defined below).

As used in subsection (B) above, "**reasonable time**" means and includes the time necessary, using reasonable diligence, to obtain possession of the leasehold interest, including, without limitation, possession of the Lessee Building, in the manner required by law under the mortgage, if the mortgagee, by written notice to ISU within thirty (30) days after receipt of ISU's notice to mortgagee, elects to do so, but no more than sixty (60) days after such written notice to ISU unless the mortgagee may be prevented from foreclosing and/or obtaining possession as a result of bankruptcy proceedings or other proceedings initiated by the LESSEE or its creditors), and, as used in subsection (B) above, also means and includes such time as is necessary to correct or cure the condition using reasonable diligence.

(v) Mortgagee Succeeds to LESSEE's Interest; Liability of Mortgagee Limited. Upon any lawful assumption of possession of the LESSEE's leasehold interest or the acquisition of LESSEE's interest in the Lessee Building, such mortgagee shall have all of the rights of the LESSEE and the duty to perform all of the LESSEE's obligations hereunder accruing thereafter, but only for so long as it holds such possession of the leasehold interest or LESSEE's interest in the Building.

Provided, however, to the extent that a mortgagee elects to undertake any cure pursuant hereto, such mortgagee shall act with reasonable diligence in accordance with the terms and conditions herein specified. Any timely actions by a mortgagee to cure a default of the LESSEE shall be accepted by ISU as if performed by the LESSEE.

(vi) Assignment And Assumption After Foreclosure. Any purchaser at a foreclosure sale other than a mortgagee shall assume all of the obligations of the LESSEE hereunder and shall have no right in respect of the Lessee Building and the Leased Premises unless the purchaser so assumes and delivers within ten (10) days of the sale (or order approving the sale, in the event such order is required by law) an instrument of assumption in recordable form assuming all of the LESSEE's obligations hereunder.

(vii) Enforcement Rights. Any mortgagee shall be entitled to enforce the provisions of this Section 30(a) in its own name as a third party beneficiary.

(viii) Notice by ISU. Any mortgagee shall be entitled to all of the rights and benefits of this Section including the right to receive any notices required to be given by ISU under this Section. ISU shall mail or deliver to such mortgagee a copy of any and all written notices which ISU may from time to time give to or serve upon the LESSEE under and pursuant to the terms and provisions of this Ground Lease pertaining to a default by the LESSEE hereunder. All notices and copies of notices required to be served pursuant to this Section shall be delivered to the address of the mortgagee last supplied to ISU by such mortgagee.

(ix) Legal Proceedings. ISU shall give each mortgagee prompt notice of any legal proceedings between ISU and LESSEE involving obligations under this Ground Lease. Each mortgagee shall have the right to intervene in any such proceedings and be made a party to such proceedings, and ISU and LESSEE shall consent to such intervention. If any mortgagee shall not elect to intervene or become a party to any such proceedings, ISU shall give the mortgagee notice of, and a copy of, any award or decision made in any such proceedings, which shall be binding on all mortgagees not intervening after receipt of notice of proceedings.

(b) Cooperation for Mortgagee Protection. ISU and LESSEE shall cooperate in including in this Ground Lease by suitable amendment from time to time any provision which may reasonably be requested by the proposed leasehold mortgagee for the purpose of implementing the mortgagee protection provisions contained in this Ground Lease and allowing such mortgagee reasonable means to protect or preserve the lien of this leasehold mortgage on the occurrence of a default under the terms of this Ground Lease. ISU and LESSEE each agree to execute and deliver (and to acknowledge, if necessary, for recording purposes) any agreement necessary to effect any such amendment; provided, however, that any such amendment shall not in any way affect the term or rent under this Ground Lease, subordinate ISU's fee interest to the ISU-Meridian to the mortgagee nor otherwise in any material respect adversely affect any rights of ISU under this Ground Lease.

31. <u>Remedies and Forbearance/Waivers.</u> No delay or omission on the part of ISU or LESSEE to exercise any right or power granted herein shall impair any such right or power nor shall be construed as a waiver thereof, and every such right or power may nevertheless be exercised.

This Ground Lease shall not be construed as obligating the State of Idaho to make future appropriations for the performance of any obligations under this Ground Lease. In the event that appropriated funds are not legally available and ISU no longer possesses the property at ISU-Meridian, then the new owner of the fee simple shall have all the rights of ISU under this Ground Lease as well as the duty to perform all of ISU's obligations accruing thereafter.

32. <u>Disposition of Lessee Building Upon Lease Termination.</u> The Lessee Building and all alterations, improvements, changes, or additions made in or to such Leased Premises shall be the property of LESSEE subject to the terms of this Ground Lease. Upon termination or expiration of this Ground Lease, ISU shall have the option of requiring LESSEE, at LESSEE's sole expense, to remove any or all of the Lessee Building and/or improvements to the Leased Premises or require that the Lessee Building and/or improvements shall remain in place. LESSEE shall have up to one hundred eighty (180) days after the expiration of this Ground Lease in which to remove improvements if requested by ISU in writing. After expiration of this Ground Lease, LESSEE shall have the right to occupy the Leased Premises for the sole purpose of removing the improvements and such occupancy shall not be considered holding over nor shall rent be due for such period of removal of improvements. In the event ISU elects to require Lessee's Building and/or improvements to remain in place, the Lessee Building and any other structures, improvements, and installations, which have been placed upon the Leased Premises, shall be deemed to be a part of the Leased Premises, and a copy of all Construction Documents and instruments, including all "as-built" plans shall be delivered to ISU and title to the Lessee Building shall be vested with the State of Idaho.

33. Termination and Removal of Property. Upon termination of this Ground Lease, all trade fixtures, equipment, and personal property ("**LESSEE Property**") installed in or affixed to the Leased Premises may be removed by LESSEE. LESSEE shall be responsible for the reasonable repair of damage caused to the Leased Premises by removal of any such property. If LESSEE elects to remove such LESSEE Property, it must remove the LESSEE Property no later than ninety (90) days after termination of this Ground Lease. In the event LESSEE fails to remove the LESSEE Property within the allowed ninety (90) days, the LESSEE Property shall then belong to ISU. If ISU elects to have the Lessee Property removed, the costs of removal shall be borne by LESSEE.

34. Disputes and Remedies. ISU and LESSEE agree that all claims for default or breach of this Ground Lease or other dispute of the Parties hereto shall first be submitted to nonbinding mediation. The Parties agree that such mediation may be requested by either Party and shall be conducted by the American Arbitration Association in accordance with Commercial Arbitration Rules of the American Arbitration Association. This agreement to mediate shall be specifically enforceable by either Party under Idaho law. The Parties hereto shall share equally the costs for any mediation. Such mediation shall commence within fourteen (14) days of demand to the American Arbitration Association.

35. Default.
    a. Default by LESSEE. In the event of any breach of this Ground Lease by LESSEE, ISU shall have all rights and remedies provided by law or statute, subject to Section 35 herein. LESSEE shall not be deemed to be in default hereunder unless ISU shall first give to LESSEE thirty (30) days' written notice of such default and LESSEE fails to cure such default within such thirty (30) day calendar day period, or if the default is of such a nature that it cannot be cured within thirty (30) days, LESSEE fails to commence to cure such default within such period of thirty (30) days or fails thereafter to proceed to the curing of such default with all possible diligence. In the event of a default or breach of this Ground Lease by ISU, LESSEE shall have all rights and remedies provided by law or statute, subject to Section 35 herein. No remedy herein conferred upon or reserved to ISU or LESSEE shall exclude any other remedy, but each shall be cumulative.
    b. Default by ISU. Failure of ISU to perform any of its obligations hereunder shall be a default by ISU thirty (30) days after written notice from LESSEE of such failure without cure by ISU. Nonappropriation of funds pursuant to Section 31.a. shall not be considered a default. Upon default, LESSEE shall have the right to enforce ISU's obligations by specific performance or obtain injunctive relief related to the default.

36. Warranty. ISU warrants that it has the power and authority to enter into this Ground

Lease, subject to the existing laws and constitutional provisions of the State of Idaho, and that no consents not already obtained are required. LESSEE warrants it has the power and authority to enter into this Ground Lease, and further warrants that following the date that LESSEE obtains a construction loan to construct the LESSEE Building, it shall have the funds necessary to complete the construction of the Lessee Building in accordance with the terms of this Ground Lease.

37. Quiet Enjoyment. So long as LESSEE pays its rent when due under this Ground Lease and observes all other provisions of this Ground Lease, ISU shall not interfere with the peaceful and quiet enjoyment of the Leased Premises by LESSEE.

38. Memorandum of Ground Lease. This Ground Lease shall not be recorded; however, it is mutually agreed that the Parties, upon request by any one Party, will execute a written Memorandum of Ground Lease, a form of which is attached hereto as Exhibit G, acknowledging the tenancy hereby created, which shall be recorded in the official records of Ada County, Idaho.

39. Attorney Fees and Costs. In the event that either Party to this Ground Lease shall enforce any of the provisions hereof in any action at law or in equity, the prevailing Party in such litigation may be entitled to recover from the other Party all costs and expenses incurred therein, including reasonable attorney's fees and all such fees and costs on appeal.

40. Integration. This Ground Lease embodies the entire agreement and understanding of the Parties relating to the subject matter herein and supersedes all prior understandings relating thereto. This Ground Lease shall not be modified except in writing signed by all Parties. In the event of any inconsistency among the terms and provisions of this Ground Lease to those of the CAA, the terms and provisions of this Ground Lease shall control.

41. Rules of Construction. In the event any conflict may be found to exist between this Ground Lease and any of the documents attached as exhibits hereto and incorporated herein by reference, including any written modifications to any of the documents that are signed by the Parties, then the provisions of this Ground Lease shall take precedence over the exhibits which shall at all times be subservient to this Ground Lease. This Ground Lease and all exhibits and any modifications have been negotiated by ISU and LESSEE, and as such, any ambiguity should be construed as if each Party was the drafter.

42. Execution of Documents. The Parties agree that they shall sign or cause to be signed, all documents necessary to the effectuation of this Ground Lease or any of the provisions herein as may be required from time to time.

43. Notices. Any notice under this Ground Lease shall be in writing and be delivered in person

or by public or private courier service, including U.S. Postal Service Express Mail, by registered or certified mail, or by facsimile. Any notice given by registered or certified mail shall be sent with return receipt requested. 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.

ISU: President Arthur C. Vailas
Idaho State University
921 So. 8th Ave, Stop 8310
Pocatello, ID 83209

LESSEE: Daniel C. Burrell, Manager
Idaho College of Medicine
401 Paseo de Peralta
Santa Fe, NM 87501

Any notice shall be deemed to have been given on (i) actual delivery or refusal; (ii) the day of mailing, if delivery is by regular, registered, or certified mail; or (iii) the day facsimile delivery is verified. A copy of any notice shall also be sent to the Department of Administration, Division of Public Works, Attn: Statewide Leasing Manager, Post Office Box 83720, Boise, ID 83720-0072. In the event of a change of address by either ISU or LESSEE, the Parties agree to notify each other in writing within ten (10) days of the date of any such change.

44. Waiver of Subrogation. ISU and LESSEE each hereby release each other from any and all liability to the other or to anyone claiming by, through, or under them by way of subrogation or otherwise for any loss or damage to property or person caused by (i) any existing or future condition, defect, or matter in or about the Leased Premises, (ii) fire or any other casualty even if such fire or other casualty shall have been caused by the willful or negligent act or omission of the other Party or anyone for whom such Party may be responsible, or (iii) any act or neglect of the applicable Party.

45. Effectiveness Condition.

a. Effectiveness Condition. Notwithstanding anything in this Ground Lease to the contrary, the effectiveness of this Ground Lease is expressly conditioned on the satisfaction of the following condition (the "**Effectiveness Condition**"):

i. The School District (as defined in the Declaration) providing its written approval to the terms and conditions of this Ground Lease in accordance with the terms of the Declaration, including without limitation, approval of the construction of the Lessee Building and other improvements on the Leased Premises.

b. Failure of Effectiveness Condition. If the Effectiveness Condition set forth in this Section 45 has not been satisfied on or before the date that is ninety (90) days following the Effective Date, then this Ground Lease shall terminate and be of no further force or effect.

c. Satisfaction of Effectiveness Condition. Once the Effectiveness Condition set forth in this Section 45 has been satisfied, then ISU shall notify LESSEE that such Effectiveness Condition has been satisfied and this Section 45 shall be null and void and of no further force or effect.

46. Binding Effect, Heirs, and Successors. This Ground Lease shall be binding upon and shall inure to the benefit of the heirs, personal representatives, successors, and assigns of the Parties, subject to the provisions herein relating to assignments.

47. Severability. In the event any provision of this Ground Lease shall be held invalid or unenforceable according to the law, the validity, legality, or enforceability of the remaining provisions and the application thereof shall not in any way be affected or impaired.

48. Headings. Section headings contained herein are for convenience and reference and are not intended to define or limit the scope of any provision of this Ground Lease.

49. Counterparts. This Ground Lease may be simultaneously executed in several counterparts, each of which shall be an original and all of which shall constitute but one and the same instrument.

50. Time of the Essence. Time is of the essence of this Ground Lease and of each and every covenant, term, condition, and provision hereof.

51. Use of Names and Relationship. Nothing contained herein shall give LESSEE the right to the use of the name of ISU or make any statement which could be construed as an affiliation therewith, unless specifically prescribed in other agreements between the Parties. The relationship created by this Ground Lease is one of lessor and lessee.

52. Negation of Partnership. ISU shall not become or be deemed a partner or a joint venture with LESSEE by reason of any of the provisions of this Ground Lease, and the Parties expressly negate any such intention.

53. Governing Law. This Ground Lease and any amendments thereto shall be governed by the laws of the State of Idaho.

(signature page follows on next page)

IN WITNESS WHEREOF, ISU and LESSEE hereto have executed this Ground Lease as of the Effective Date.

IDAHO STATE UNIVERSITY	IDAHO COLLEGE OF OSTEOPATHIC MEDICINE
BY: ______________________________ Arthur C. Vailas, President	BY: ______________________________ Daniel C. Burrell, Manager
DATE: ____________________________	DATE: ____________________________

DIVISION OF PUBLIC WORKS, DEPARTMENT OF ADMINISTRATION

BY: ______________________________

Linda Miller, Leasing Manager

DATE: ____________________________

EXHIBIT A

ISU-Meridian Legal Description

Lot 2 in Block 1 of Joint No. 2 Subdivision Phase 1, according to the official plat thereof, filed in Book 99 of Plats at Page(s) 12828, through 12830, records of Ada County, Idaho.

EXHIBIT B

Collaborative Affiliation Agreement

(attached)

Collaborative Affiliation Agreement

between

Idaho College of Osteopathic Medicine, LLC

and

Idaho State University

THIS COLLABORATIVE AFFILIATION AGREEMENT ("Agreement") is made and entered into by and between the Idaho College of Osteopathic Medicine, LLC hereinafter referred to as "ICOM", and Idaho State University ("University"), a state institution of higher education governed by the Idaho State Board of Education ("Board").

REPRESENTATIONS

1. University was established in Idaho Code, Title 33, Chapter 30.

2. ICOM is an Idaho limited liability company in good standing, created by its organizers for the purpose of creating and operating a private accredited college of osteopathic medicine ("COM"). *Note: The incorporation will be completed immediately if the decision is made to place a new medical school in Idaho. Also, the official public DBA name has yet to be selected. It will not be The Burrell College of Osteopathic Medicine at Idaho State University; rather a name will be selected, with local stakeholder input, that complements the local culture and geography and with "at Idaho State University" as the ending part of the name.*

3. ICOM is presently in the process of seeking pre-accreditation status, then provisional accreditation, from the Commission on Osteopathic College Accreditation (COCA) of the American Osteopathic Association (AOA) which the U.S. Department of Education recognizes as the accrediting body for osteopathic medical colleges, with the intention of obtaining full accreditation status as expeditiously as the rules of COCA permit.

4. ICOM intends to locate the COM on a parcel of land located within the University's Meridian Campus, which is the University's Health Sciences Campus ("Meridian Campus"), in accordance with the Master Declaration Agreement and Joint Operations and Maintenance Agreement between the University and Joint School District No. 2, Ada and Canyon Counties, Idaho (now known as West Ada School District), and for this purpose has or will enter into an agreement ("Lease") to lease/sublease a parcel of land on the Meridian Campus and/or space within an existing building or multiple buildings. The effectiveness of this Agreement and the Lease are each contingent upon execution of the other.

5. This Agreement is entered into for the purpose of defining and establishing the relationship between the parties, and to provide for the purchase and sale of University services to ICOM.

6. The parties understand and agree that pursuit and achievement of the aforementioned accreditation of the COM is of material importance and that University would be unwilling to enter this Agreement without assurance from ICOM that the accreditation process is underway, and once full accreditation is received, that the COCA accreditation (or some equivalent national accreditation, should COCA cease to exist or be replaced with a similar accrediting body), will be maintained for the duration of this Agreement. ICOM commits to using diligent good faith efforts toward that end.

7. The parties understand and agree that the purpose of this Agreement is to establish a public/private collaboration which is intended to both facilitate and enhance University's ability to accomplish its health science mission, core themes and strategic plan, and to assist ICOM in accomplishing its mission to establish a private College of Osteopathic Medicine on the University's Meridian Campus.

8. The parties stipulate that ICOM and University are independent legal entities whose legal relationship is defined exclusively by this Agreement and the Lease. Neither party has the authority to represent or hold itself out as being part of the other, nor to assume or create any obligation expressed or implied on behalf of the other party. ICOM agrees to place appropriate disclaimers on all printed and digital materials and websites. An example of an approved COCA disclaimer is as follows: *"The (To be Named) College of Osteopathic Medicine at Idaho State University is a free-standing, privately funded, separately licensed and accredited and independently operated entity and is not part of Idaho State University."* The final disclaimer is subject to mutual approval by both COCA and the University's accrediting body, as well as by the University and ICOM.

9. The individual signing this agreement on behalf of ICOM personally represents that he or she has appropriate legal authority to act on behalf of ICOM to enter into this Agreement, and will provide to University documentary evidence of that authority prior to or at the time of signing.

10. The parties acknowledge that the Meridian Campus was selected for the COM, in part, because of its designation as a Health Science Campus and its proximity to major medical centers, and the opportunity to enhance the educational experience of ICOM's students by purchasing services for those students and access to University's facilities for those students from the University.

11. The parties acknowledge that the proximity of the COM on the Meridian Campus is expected to create opportunities for University faculty and students to collaborate with ICOM faculty and students with respect to possible joint degree programs and joint research initiatives and that these educational opportunities are a valuable incentive for the establishment of this Agreement and for allowing ICOM to lease/sublease a location for the COM within the University's Meridian Campus.

12. ICOM acknowledges that Idaho law prohibits University from using public funds to support a private college, and that this Agreement shall be interpreted in such a manner as to ensure that ICOM and its faculty, employees and students shall at all times be required to pay the full cost of any service or benefit received under this Agreement.

NOW, THEREFORE, in consideration of the mutual conditions and covenants contained herein, University and ICOM agree as follows:

A. Term of the Agreement:

This Agreement shall become effective upon the latter date of either the execution of this Agreement or the execution of the Lease , and shall remain in effect until the earlier of: (i) expiration forty years after the effective date of this agreement; (ii) termination of the Lease between University and ICOM ; (iii) the cessation of operation of a College of Osteopathic Medicine on the premises leased/subleased to ICOM; (iv) the denial, withdrawal, loss or suspension of the COM's COCA accreditation and exhaustion of the appeals processes provided by COCA standards; or (v) written agreement of the parties hereto, and subject to the renewal rights set forth in the next paragraph.

The parties understand and agree that this Agreement, if still in effect at its expiration date and so long as a COM is operated on the premises at the Meridian Campus, may be renewed by either party, provided the party seeking to renew is not at that time in breach of the Agreement, for two (2) additional ten (10) year terms. The right to renew the Agreement shall be exercised by written notice of extension to the other party, no later than sixty (60) days prior to the expiration of the then-existing term.

B. Student Services and Facility Usage:

University agrees to provide those individuals enrolled and physically located at the Meridian Campus as regular full time active students at the COM ("ICOM Students") with the specific services and use of facilities which are listed in Schedule A to this Agreement ("Student Services"), subject to the terms, restrictions and conditions of this Agreement. Schedule A is appended hereto and incorporated by reference herein. The parties understand that the services listed in Schedule A will be subject to periodic review and modification by University, but will at all times include a substantial portion of those services that are provided to University's students from University's student fee assessment. It is understood that these services and fees do not pertain to students who reside full-time outside of Ada and Canyon counties, Idaho during their third and fourth clinical training years. ICOM agrees to pay University for the Student Services in accordance with the terms set forth below.

1. ICOM agrees, on an annual basis, to select from among the listed services in Schedule A, to compensate University with an annual lump sum payment to University for the Student Services, to be remitted in advance of services being rendered, as provided herein below.

a. The Annual Services Payment ("ASP") amount shall be calculated by the following formula:

(ICOM Headcount x University Graduate Student Fee x Number of University Semesters in Academic Year x Administrative Cost Factor)

Where:

i. "ICOM Headcount" equals the number of duly enrolled full-time students attending COM as determined on the 7th day after the start of its academic calendar year;

ii. "University Student Fee" equals the per semester full-time student fee amount, as established annually by the Board for University's students (based on the fees charged to University's graduate students taking 9 or more graduate credits);

iii. "University Semesters in Academic Year" is equal to the number of academic semesters which occur in an academic year in which University's enrolled students are required to pay the University student fee (currently there are 2 University Semesters in the Academic Year plus a summer session; additional student fees are assessed during the summer session); and

iv. "Administrative Cost Factor" is a multiplier determined by University to account for indirect costs of administering Student Services which are not included in University's process of establishing its University Student Fees (the University's best estimate at this time is a factor of 15%, however, University may adjust this number periodically to provide recovery of all actual indirect costs). Should the Administrative Cost Factor increase to a rate that is not satisfactory to ICOM then the parties shall discuss in good faith, and if no agreement is reached, ICOM may choose to discontinue the use of certain services listed in Schedule A.

b. Under no circumstances shall the compensation paid for Student Services be less than University's actual costs, both direct and indirect, in making the support services available to ICOM Students. No public funding can or will be utilized in providing the Student Services. In the event that it is determined by an audit of University by a public official or a certified public accountant that public funds have been used for the benefit or support of ICOM, without payment of full and fair consideration, in addition to the compensation set out above, ICOM will reimburse University for such use of public funds within thirty (30) days after notification to ICOM of the circumstances and the amount due if the total amount to be refunded is $50,000 or less and ninety (90) days after notification to ICOM of the circumstances and the amount due if the total amount to be refunded is greater than $50,000.

c. University student fee amount is subject to annual review and adjustment by the Board in accordance with Idaho state law and Board Governing Policies and Procedures. In the event that during the academic year, the Board approves a student fee increase for University's students, then within 30 days of notification, ICOM will remit an additional fee assessment in an amount to be determined in accordance with the formula set out above.

d. ICOM will provide University with an estimated headcount at least 45 days before the first day of ICOM's academic calendar year in the fall of each year. University will calculate an estimated ASP based on the estimated headcount and selected services for full-time first and second year students and will submit an invoice for that amount to ICOM at least 30 days prior to the start of ICOM's academic year. ICOM will remit payment of 85% of the estimated ASP amount to University no later than 15 days prior to the start of ICOM's academic calendar year.

e. ICOM shall report its actual enrollment headcount to University no later than 10 days after the start of ICOM's academic calendar year, and within 15 days of receipt of the headcount number, University will submit an adjusted invoice for the actual ASP amount, showing a credit for the amount previously paid. ICOM shall, within 45 days after the start of classes under ICOM's academic calendar, remit the balance due, if any, for the annual compensation payment amount.

f. The ASP provided herein is intended as compensation for the Student Services to be provided by University. ICOM and University understand and agree that University may provide additional services to University's students which are not included in Schedule A and will not be provided to ICOM students, and that there will be no adjustment in the ASP for those omitted services; provided that, the student services made available to ICOM students will always include a substantial portion of those services offered to University's students and paid for by student fees. The selected services by ICOM may be vary from year to year.

2. University's obligation to provide ICOM students with the Student Services specifically listed in Schedule A is subject to the terms, restrictions and conditions set forth in this Agreement.

a. The Student Services will be provided to ICOM students only during such times, and on such terms, as such benefits are provided to University's students. University is under no obligation to provide Student Services at any time in which such services are not available to University's students. Any services discontinued, restricted or altered for University students will also be discontinued, restricted or altered for ICOM students without reduction in or rebate of the compensation paid under this Agreement.

b. When the Student Services listed in Schedule A are subject to capacity limitations, University reserves the right to give priority to University students in the distribution of Student Services. University will undertake good faith efforts to provide adequate capacity for both University and ICOM students.

c. University agrees to issue an identification card, similar in form and function to those issued by University to its own students, to the duly enrolled full-time active ICOM students. This identification card will be used by University to identify eligible ICOM students and by ICOM students to access the Student Services provided under this Agreement. Only students presenting the ICOM student identification card will be provided Student Services under this Agreement. ICOM shall be responsible for providing University with a list of the duly enrolled ICOM students who are to be provided with identification cards. ICOM students will be charged the same rate for new or replacement identification cards as University students (currently $15).

d. All duly enrolled full-time active ICOM students are eligible to receive Student Services as provided in this Agreement, except as otherwise stated herein. Notwithstanding the foregoing statement, while physically present on the Meridian Campus, ICOM students are subject to all University policies, rules and regulations regarding visitors to the Meridian Campus. University reserves the right to prohibit ICOM students from access to the Meridian Campus consistent with applicable University policy. University will, as soon as practicable, provide ICOM with notification of any such action taken by University with respect to any ICOM student. In such an event, ICOM shall not be entitled to refund or rebate of any portion of the ASP.

3. No Individual Rights: ICOM students are not third-party beneficiaries under this Agreement and have no individual rights hereunder. The services and license to access facilities on the Meridian Campus as provided for herein do not indicate or signify enrollment, academic standing, nor employment with University.

4. In addition to the Student Services provided through this Agreement and listed in Schedule A, and subject to approval by ICOM, ICOM students shall be eligible to purchase or receive the Optional Services described in Schedule B if the University has the capacity to provide the Optional Services after first serving its University students.

C. Accreditation

1. At all times after securing accredited status as an Osteopathic Medical College through COCA, ICOM shall maintain that accreditation, or some equivalent national accreditation (should COCA cease to exist or be replaced with a similar accrediting body), as well as ensure compliance with applicable state statutes and regulations governing private postsecondary educational institutions in Idaho. The denial or termination of provisional accreditation, or the denial of or termination of accreditation, or the withdrawal from accreditation, after the exhaustion of or expiration of all opportunities for reconsideration or appeal under COCA standards or rules, is a breach of this Agreement.

2. ICOM shall provide the provost of University with a copy of all accreditation results and

reports including AOA approvals at the time of each evaluation. ICOM shall immediately notify the provost of University in writing at any such time that ICOM receives notice of accreditation with warning, probationary accreditation status, pending loss or loss of accreditation from AOA.

D. Maintaining Separate Legal Identities

1. When entering into legal documents of any type, ICOM shall not hold itself out as being controlled by, being part of, or acting on behalf of University. ICOM shall not use University's taxpayer identification number or University's tax-exempt status or represent itself as part of the University in connection with purchases or sales by ICOM, gifts to ICOM, interest or other income of ICOM, or any other activity of ICOM.
2. University and ICOM agree to take reasonable measures to ensure that third parties understand that ICOM is not part of University. However, ICOM and University may inform third parties of the existence of the Public/Private collaboration created by this Agreement.
3. The parties understand that particular care must be taken during any gift solicitation or development or fundraising efforts to ensure that donors and potential donors are not mislead or confused regarding the relationship and association of the parties. Accordingly, each party agrees to explicitly inform any donors or potential donors of their independent status in the event of any inquiry or if there is ever any indication of confusion on the part of such third party.
4. Any research grant proposals prepared as a result of collaboration between the parties and submitted to external third parties shall explicitly identify the parties as independent legal entities.

E. Conduct of Faculty, Staff and Students

1. Regardless of the affiliation of any faculty, staff, students or visitors who may be involved, any criminal misconduct or violation of state or federal statute or law shall be reported by either party having knowledge of such misconduct or violation. Subject to Section I.3., certain reports may be made to the appropriate law enforcement agency, which in the case of any property owned by University, shall be the University Public Safety Department and if applicable, to the appropriate University and/or ICOM department (i.e., Title IX Coordinator, Student Affairs). *(Note: Once a specific location is officially determined, we'll include a clause identifying whether the property is owned by the campus or a third party and subject to city PD jurisdiction.)* Any other governmental agency found or believed to have jurisdiction may be notified as well.
2. ICOM has primary jurisdiction with respect to conduct issues that arise with ICOM students, faculty, or staff. ICOM will adopt appropriate policies to address such situations and ICOM administrators to take the lead in investigating resolving such issues in accord with that policy. ICOM administrators will inform and coordinate with appropriate University parties in the event the conduct involves University students, faculty or staff or otherwise has consequences that affect University.

3. Notwithstanding the foregoing, ICOM and University agree that University maintains the right to bar specific ICOM students, faculty, or staff from the University's campus, excepting lands leased to ICOM, in accordance with University policy, or as provided in Paragraph B.2.d. above, and to report any illegal or dangerous activity to any appropriate law enforcement agency or fire and emergency services offices.

F. University Engagement with ICOM Governance

For the purpose of ensuring ongoing collaboration between the parties and to facilitate efforts of the parties to realize the potential benefits for each that this collaboration affords, ICOM agrees that two positions on the ICOM Board of Trustees will be designated for individuals who are employees or otherwise affiliated with the University ("University Affiliated ICOM Board Member"). Prior to the time of the ICOM Board of Trustee's initial formation, and thereafter at least 30 days before the selection of replacement University Affiliated ICOM Board Members, ICOM will solicit nominations from the President of University for individuals to serve in the University Affiliated Board Member positions. At least 10 days prior to the selection date, the University President shall forward recommendations of interested, qualified individuals for these University Affiliated ICOM Board Member positions to the ICOM President, for consideration for appointment. Final decisions regarding which of the individuals so recommended are to be appointed to the ICOM's Board of Trustees rest solely with ICOM. If the University President's nominees are not appointed, the ICOM President will request additional nominees from the University President, until acceptable nominees are submitted.

In addition to participation on ICOM's Board of Trustees, the ICOM President shall ask University President for recommendations of interested, qualified individuals to serve on ICOM Advisory Boards that may be developed in the future.

G. Academic Collaborations

The parties have entered into the Lease and this Agreement with the expectation that this relationship will be more than an economic arrangement. Both parties are seeking to maximize the benefits that may flow from the collaborations made possible by the geographic proximity of their respective academic enterprises. The following terms are intended to establish the framework for such collaborations with the understanding and expectation that the nature, duration and commitments arising from academic collaborations will evolve over time and will be subject to separate and additional documentation as deemed necessary or desirable by the parties.

1. Curriculum: Each party will develop and maintain its own curriculum and student policies and procedures independent of the other. Neither party will have authority or exercise control over the other with respect to curriculum, degree requirements or the award of degrees. ICOM will develop its clinical and hospital contracts for the benefit of its students without any commitment of or obligation on the part of University. However, University and ICOM will be allowed to collaborate and enter into clinical and

hospital affiliation agreements that are mutually beneficial. Such agreements are subject to mutual written approval of both ICOM and University.

2. Faculty Collaboration: The parties shall use good faith efforts to collaborate regarding faculty teaching and research expertise. Faculty employed by one party may seek non-tenure track appointments with the other party for the purpose of teaching or research. When faculty from University provide teaching or research services to ICOM, ICOM shall reimburse University, or the faculty providing those services, consistent with the rate and other terms and conditions mutually agreed upon in writing by the parties, and predicated upon compliance with applicable Board Governing Policies and Procedures, and Idaho state law. Each party agrees to notify and seek the consent of the immediate supervisor and academic Dean of any faculty employed by the other party to whom they wish to offer a joint appointment. Faculty teaching in these joint appointments shall be granted a title appropriate to their status and may be listed in course catalogs and for purposes of accreditation as teaching faculty.
3. Joint Degree Program Development: University and ICOM agree to use good faith efforts to collaborate in pursuit of development of joint degrees. Both parties agree to seek and pursue opportunities that are mutually beneficial to both parties, and to avoid, to the extent practicable, competition between the parties concerning the establishment of the same or similar/duplicative academic programs.
4. Joint Research Initiatives: The shared goal of both parties to this Agreement is to collaborate to obtain an increase research funding and other grants available to healthcare related disciplines. ICOM and University agree to use good faith efforts to collaborate on research projects that will be mutually identified and which the parties agree will be mutually beneficial. Any specifically agreed upon research project shall be the subject of a separate research memorandum that will detail the scope of work, benefits to University and ICOM, ownership and publication rights with respect to any intellectual property arising from or generated by the research, budgets and funding mechanisms for each project. Any such research memorandum shall incorporate by reference and be subject to the terms and conditions of this Agreement. It is agreed by the parties that no public funding appropriated or granted for the exclusive use by University will be used to support any portion of a research project conducted by ICOM.

H. Liability Insurance and Defense

1. ICOM understands and agrees that University will not be liable for any of ICOM's contracts, torts, or other acts or omissions, or for those by ICOM's directors, officers, members, managers, employees or students. ICOM understands and agrees that neither it, nor its directors, officers, members, managers, employees, staff or students will be protected by University's or the State of Idaho's insurance policies or self-insurance plans in connection with ICOM's activities, and University and the State of Idaho will not provide any legal defense for ICOM.
2. ICOM shall indemnify and hold harmless University, its trustees, officers, employees or

any other agents from any and all claims, damages, losses, liability, costs and expenses including attorney fees, arising out of or in connection with any activity conducted by ICOM, including but not limited to contracts, torts, and other acts or omissions by ICOM, its directors, members, managers, officers, employees and students.

3. University understands and agrees that ICOM will not be liable for any of University's contracts, torts or other acts or omissions, or for those by University's directors, officers, employees, or other agents. University shall hold harmless ICOM, its directors, members, managers, officers, employees, and students only from claims, damages, losses, liability, cost and expenses consistent with University's immunity as a public institution under Idaho law, and subject to the limitations on liability and damages provided by the Idaho Tort Claims Act; this indemnity is only to the extent that is allowed by law.

I. Legal Compliance

1. The parties agree and understand that although they are separate and distinct legal entities, and although every effort will be made to ensure that no confusion exists on the part of third parties or the public regarding the nature of their relationship, as a public entity, University is expected to maintain high standards and to serve the public interest, and its reputation and standing in the community could be adversely affected by any illegal conduct by ICOM. Accordingly, as part of this agreement, ICOM is obligated to fully comply with all laws and regulations applicable to its operation of the COM and its use of the leased/subleased premises.
2. During the term of this Agreement, ICOM shall comply with all current and future state and federal statutes, rules and regulations pertaining to its operation of the COM. ICOM shall prepare and timely file all tax returns and reports including information returns required to be filed by it under federal, state and local laws. Further, ICOM shall notify University within ten (10) days from receipt of any report of noncompliance with any state of federal statute, rule or regulation. Any failure to comply with applicable laws and regulations is a breach of this agreement.
3. ICOM agrees to meet the requirements of Title IX, Education Amendment of 1972, VAWA and SAVE Acts, the Clery Act and all other applicable laws. The parties agree to work collaboratively and to coordinate action as may be necessary for compliance with Title IX, Education Amendment of 1972, as amended, and the Clery Act.

J. Termination of Agreement and Remedies Upon Default

1. In the event ICOM breaches any provision of this Agreement or the Lease, and remains in default after notice and an opportunity to cure said breach, University may elect to terminate this Agreement and pursue any remedies at law or equity available to it for breach of contract. For any breach involving non-payment of amounts due under this Agreement, the opportunity to cure the breach shall be a period of ten (10) days after notice of breach. For all other types of breach, the opportunity to cure the breach shall be a period of sixty (60) days after notice of breach.

2. In the event of the termination of this Agreement due to termination of the Lease, the closure of the COM, the failure to obtain accreditation, loss of accreditation of ICOM, or the dissolution or final liquidation of ICOM, University shall be entitled to recover from ICOM the value of any unpaid fees due hereunder and any remedies at law or equity available to it for breach of contract.
3. In the event University breaches any provision of this Agreement or the Lease, and remains in default after notice and a sixty (60) day opportunity to cure said breach, ICOM may elect to terminate this Agreement; however, in such event, the sole remedy available to ICOM for any claimed breach of this Agreement shall be any remedies at law or equity available to it for breach of contract or specific performance.

K. General Contract Terms

1. Waiver: Failure of either party to enforce any of the provisions of the Agreement shall not be construed as a waiver of that, or any other, provision or any later breach thereof.
2. Notices: Any notice under this Agreement shall be deemed given when delivered in person or received in the mail, postage prepaid, and addressed as follows:

   If to ICOM:
   Daniel C. Burrell, Manager
   401 Paseo de Peralta
   Santa Fe, NM 87501
   Note: A new Idaho Address will be established.

   If to Idaho State University:
   President Arthur C. Vailas
   Idaho State University
   921 So. 8th Ave, Stop 8310
   Pocatello, ID 83209

3. Amendments: This Agreement embodies the entire agreement of the parties with regard to the subject matter hereof. No other agreements, oral or written, shall vary the terms of this agreement, and this Agreement may not be amended except by written document executed by both parties.
4. Severability; Reformation: Each paragraph and provision of this Agreement is severable from the entire Agreement; and if any provision is declared invalid, the remaining provisions shall nevertheless remain in effect and shall be reformed so as to allow, to the maximum extent allowed by law, for the parties' intent in the original drafting.
5. Governing Law: The terms of this Agreement shall be governed by and construed in accordance with the laws of the State of Idaho, without reference to its conflicts of law principles.

IN WITNESS WHEREOF, the parties have executed this Agreement below:

Idaho College of Osteopathic Medicine, LLC, by:

Daniel C. Burrell

Title: Manager
Date:

Idaho State University, by:

Arthur C. Vailas, Ph.D.

Title: President
Date: February 26, 2016

SCHEDULE A to Collaborative Affiliation Agreement

ICOM Affiliated Student Services

Effective February 17, 2016

(Subject to periodic review and adjustment as provided in the Collaborative Affiliation Agreement)

(Services listed in this agreement are subject to availability assuming University students have first priority if capacity is limited)

1. **Fitness Center**
   ICOM Students shall be provided the ability to access and utilize the Fitness Center.

2. **Student Health Center**
   ICOM Students shall be provided access to Student Health Services at Unity Health and at the various ISU Clinics.

3. **Intercollegiate Athletics**
   ICOM Students shall be provided the ability to access University Intercollegiate Athletic Events, subject to ticket availability.

4. **University Information Technology**
   a. ICOM Students shall be provided the ability to access and utilize University wireless information technology systems and specified printing capabilities while on University's Meridian campus.
   b. ICOM Students shall be provided the ability to access and utilize University's Meridian computer labs.

5. **Emergency Notifications** (http://www.idaho.edu/ISUalert/)
   ICOM faculty, staff and students, may elect to be entered into University's Emergency Notification System (ISU Alert) database in order to receive emergency notifications disseminated by University's Meridian Campus.

6. **University Library Services**
   ICOM Students and University Students shall be provided the ability to access, utilize and check out materials from each party's library as is mutually beneficial. (ICOM shall be responsible for providing its own internal library and collections as required to meet ICOM's instructional and accreditation requirements. University

bears no responsibility to alter its collections to address needs of ICOM Students, faculty or staff.)

- If ICOM wants to discuss options where the University provides/subcontracts library resources specific to the needs of ICOM students, University's Library Dean, needs to be involved with those discussions.

7. **Student ID Card**

ICOM students will receive a student identification card allowing them to utilize many of the services outlined in this agreement. University reserves the right to create a unique ID card for ICOM students, so they are distinct from University students.

a. Student ID cards have no initial cost.
b. Replacement ID cards (for any reason) are $15.

SCHEDULE B to Collaborative Affiliation Agreement

ICOM Affiliated Optional Student Services

Effective February 17, 2016

(subject to periodic review and adjustment as provided in the Collaborative Affiliation Agreement)

1. On-Campus Parking

a. ICOM Students shall be eligible to purchase University Parking Permits on the same basis and subject to the same rules and restrictions as University's students.
b. ISU Parking Permits are not required for parking that is accomplished within the premises defined under the ICOM Sublease.
c. ICOM Students will have the same options afforded University students regarding types of parking permits made available.
d. ICOM Students shall be charged at the established Parking Permit rates as adopted by University for University students.
e. University reserves the right to give parking permit priority to University students.

EXHIBIT C

Master Declaration Agreement and Joint Operations and Maintenance Agreement

(attached)

After recording, return to:

Recording Requested By and
When Recorded Return to:
Paula Landholm Kluksdal
HAWLEY TROXELL ENNIS & HAWLEY LLP
P.O Box 1617
Boise, Idaho 83701

SPACE ABOVE THIS LINE FOR RECORDER'S USE ONLY

1104 2402 NJ51 (Space Above Provided for Recorder's Office)

MASTER DECLARATION AGREEMENT

THIS MASTER DECLARATION AGREEMENT is made on December 4, 2007, by the BOARD OF TRUSTEES AND STATE BOARD OF EDUCATION OF IDAHO STATE UNIVERSITY ("ISU") and JOINT SCHOOL DISTRICT NO. 2, Ada and Canyon Counties, Idaho, an Idaho school district ("School District").

PREAMBLE:

A. The School District is the owner of certain real property located in the City of Meridian, County of Ada, State of Idaho, described in Exhibit "A" attached hereto and by this reference incorporated herein (the "School District Property") ISU is the owner of certain real property located in the City of Meridian, County of Ada, State of Idaho, described in Exhibit "B" attached hereto and by this reference incorporated herein (the "ISU Property"; the ISU Property and the School District Property are herein collectively called the "Property").

B. Concurrently with the recording of this Agreement, School District has conveyed the ISU Property to ISU. The parties have determined that it is desirable and necessary, for the efficient preservation of the values of the Property and for the maintenance and preservation of the Building (as defined below) and the Common Areas (as defined below) to enter into this Agreement for the purpose of maintaining and administering the Building and Common Areas and insuring the Building complies with the necessary code provisions and regulations.

C ISU and the School District hereby declare that all of the Property shall be held, leased, occupied, sold and conveyed subject to the following covenants, conditions,

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restrictions and easements, all and each of which are for the purpose of enhancing and perfecting the value, desirability and attractiveness of the Property and for the protection of the Property. All and each of these covenants, conditions, restrictions and easements are hereby imposed as equitable servitudes upon the Property. The covenants, conditions, restrictions, reservations, easements and equitable servitudes set forth herein shall run with the Property, and every portion thereof, shall be binding on all parties having or acquiring any right, title or interest in the Property or in any part thereof, and their successors and assigns, shall inure to the benefit of every portion of the Property and any interest therein, shall inure to the benefit of each Owner, and his successors and assigns, and may be enforced by any Owner

ARTICLE 1
DEFINITIONS

The following words, when used in this Agreement and in any amendment to this Agreement, unless otherwise provided, shall have the following meanings:

Section 1.1. "Agreement" shall mean this Master Declaration Agreement, as it may be amended from time to time as provided herein.

Section 1.2. "Building" shall mean the building located on the Property known as the District Services Center.

Section 1.3. "Common Areas" shall mean any portion of the Property, including the Improvements thereon, which are used in common by the Owners or maintained in common by the Owners, including, but not limited to (a) all roadways within the Property, (b) any landscaping located within the Property, (c) all parking areas within the Property as depicted on Exhibit "C" attached hereto, (d) outside and parking lot lighting and signage within the Property, (e) sidewalks within the Property, (f) the roof, and (g) any Improvements which are restricted to a use or uses beneficial to the Owners in common by reason of requirements imposed upon the Property by governmental entities, including but not limited to the electrical room and the storage room, as depicted on Exhibit "C" attached hereto, regardless of whether such Improvements are in the Building.

Section 1.4. "Improvement" shall mean all structures, systems and appurtenances thereto of every kind, whether above or below the land surface, including, but not limited to, the Building, utility systems, drainage systems, walkways, driveways, parking areas, landscaping items, fences, landscaping vegetation, wetland improvements and improvements to wetland buffer areas, irrigation systems, signs, exterior fixtures and any structure of any kind.

Section 1.5. "Joint Operations and Maintenance Agreement shall mean the document executed contemporaneously herewith governing the common maintenance of the Property.

Section 1.6. "Mortgage" - "Mortgagee" - "Mortgagor" shall mean any mortgage, deed of trust or other conveyance of a Parcel to secure the performance of an obligation that will be void and reconveyed upon completion of such performance. Reference in this Agreement to a Mortgagee shall be deemed to include the mortgagee of a mortgage, a beneficiary of a deed of trust or the secured party of any other conveyance for security purposes; reference to a Mortgagor shall be deemed to include the mortgagor of a mortgage, trustor or grantor of a deed of trust, or the debtor of any other conveyance for security purposes

Section 1.7. "Notice of Interest" shall mean written notice from an Owner to another Owner of such Owner's intent to purchase the other Owner's Parcel pursuant to the terms and conditions of the right of first refusal set forth herein in Article 6.

Section 1.8. "Occupant" shall mean a lessee or licensee of an Owner, or any other Person other than an Owner in lawful possession of a Parcel, or a portion of a Parcel, with the permission of the Owner.

Section 1.9. "Owner" shall mean the Person, including ISU and the School District, holding fee simple title of record to a Parcel, including purchasers under executory contracts of sale. "Owners" shall mean all of the owners of Parcels within the Property

Section 1.10. "Parcel" shall mean each of the ISU Property and the School District Property or any portion therein.

Section 1.11. "Person" shall mean a natural individual, corporation or any other entity with the legal right to hold title to real property.

Section 1.12. "Property" shall mean all of the Parcels

Section 1.13. "Reconstruction Assessment" shall mean a charge against each Owner and its Parcel, representing a portion of the cost for repair or replacement of any portion of damaged or lost Improvements in the Common Areas, as provided for in this Agreement.

Section 1.14. "Service Facilities" shall mean loading docks, trash enclosures and compactors, exterior coolers, electrical and refrigeration facilities and other similar service facilities.

Section 1.15. "Transfer Notice" shall mean written notice from an Owner to another Owner of such Owner's intent to sell its Parcel pursuant to the terms and conditions of the right of first refusal set forth herein in Article 6.

Section 1.16. "Street" shall mean any street, drive, way, lane, place or other thoroughfare either within or adjacent to the Property or as so used as a part of the Common Areas, whether private or public.

ARTICLE 2
COMMON AREA, EASEMENT'S AND RIGHT'S OF ENTRY

Section 2.1. Easements.

(a) Access and Parking. The School District hereby grants and conveys to ISU a perpetual non-exclusive easement to use all Streets located upon the School District Property for ingress, egress and access between ISU and East Central Drive. ISU hereby grants and conveys to the School District a perpetual non-exclusive easement to use all Streets located upon the ISU Property for ingress, egress and access between the ISU Property and East Central Drive. In addition, the School District and ISU each hereby grant and convey to the other perpetual, non-exclusive easements to use all parking areas presently existing or which may exist in the future on the Property.

(b) Maintenance and Repair Each Owner grants to the other Owner perpetual nonexclusive easements over the Common Areas and the Parcels as necessary to maintain and repair the Common Areas and to perform all tasks in accordance with the provisions of this Agreement and the Joint Operations and Maintenance Agreement

(c) Utility Easements. Each Owner grants to the other Owner perpetual easements over the Parcels and the Common Areas for utility services and laterals, and repairs, replacement and maintenance of the same, over all of the Common Areas serving the individual Parcels as necessary in accordance with the locations of the utilities as initially installed or in accordance with alterations of the Building. Such easements shall not be used in a manner that would unreasonably interfere with the use and enjoyment by the Owners of their Parcels and the Common Areas. Any damage to another Owner's Property due to any repairs, replacement and maintenance shall be the responsibility of the Owner making such repairs, replacement and maintenance. All such easements shall be appurtenant to and shall pass with the title to each Parcel when conveyed. The utilities to the Building shall be separately metered to each Parcel.

(d) Encroachment ISU and the School District each grant to the other perpetual easements appurtenant to each of the Parcels over the other Parcel and the Common Areas for the purposes of (1) maintaining the Common Areas and accommodating authorized construction, reconstruction, repair, shifting, movement or natural settling of the Improvements, or any portion thereof, and (2) maintaining drainage in accordance with the drainage pattern existing at the time of the recording of this Agreement or in accordance with such drainage pattern as altered with the prior consent of the Owners.

(e) Easements for City and County Use In addition to the foregoing easements over the Common Areas, there shall be, and the Owners hereby reserve and covenant for themselves and all future Owners within the Property, easements for public services and utilities, including, without limitation, the right of the city, county, or other recognized governmental entity to install, maintain and repair public sanitary sewer and public water systems and the right of the police to enter upon any part of the Common Areas for the purpose of enforcing the law. Such representation and covenant shall not constitute any dedication to the public except to the extent such easements are depicted and set forth on record any plat for the Property.

Section 2.2. Rights of Entry. Each Owner shall have a limited right of entry in and upon the exterior of all Improvements located on any Parcel for the purpose of inspecting the same and taking whatever corrective action may be deemed necessary or proper, as may be authorized by the provisions of this Agreement. However, nothing herein shall be construed to impose any obligation upon an Owner to maintain or repair any portion of a Parcel or any Improvement thereon which is to be maintained or repaired by the other Owner. Nothing in this Article shall in any manner limit the right of any Owner to the exclusive occupancy and control over the interior of the portion of the Building located upon its Parcel. However, each Owner shall permit access to such Owner's Parcel or Improvements thereon by the other Owner as reasonably necessary, such as in case of any emergency originating on or threatening such Parcel or Improvements, whether or not such Owner is present.

Section 2.3. Leasing of Property. Every lease or other agreement for the hire or occupation ("lease") of any portion of the Property which is executed after the recording of this Agreement shall be subject to the provisions of this Agreement, and every Occupant of a Parcel or a portion thereof shall in all applicable respects comply with the provisions of this Agreement Every Owner shall:

(a) Include in any agreement for the lease of all or any portion of its Parcel a specific provision that said lease is subject to this Agreement and the Joint Operations and Maintenance Agreement, that the Occupant of the Parcel will comply with the provisions of this Agreement, and that such provisions are an integral part of the lease; and

(b) Not execute a lease to any portion of the Property without complying with the provisions of Section 2.3(a) above; provided, however, that an Owner's failure to do so shall not diminish the effect of this Agreement with respect to any such lease. The lease shall not become effective until an Occupant has executed a lease containing the provision required in Section 2.3(a) above.

Section 2.4. Common Area.

(a) The Common Area is hereby reserved for the sole and exclusive use of all Owners of the Property, their tenants, contractors, employees, agents, customers, licensees and invitees and the subtenants, contractors, employees, agents, customers, licensees and invitees of such tenants The Common Area may be used for vehicular driving, parking (except that there shall be no multi-level parking), pedestrian traffic, directional signs, sidewalks, walkways, landscaping, perimeter walls and fences, parking lot lighting, utility lines and Service Facilities and for no other purpose unless otherwise specifically provided in this Agreement or Section 1.3 hereof No buildings or structures not approved in writing by the Owners shall be placed or constructed in the Common Area designated for vehicular traffic or parking except directional signs, paving bumper guards or curbs, landscape planters, lighting standards, perimeter walls and fences, utility pads and equipment, sidewalks and, to the extent that they are located, and do not impede access, to the rear or sides of the Building.

(b) The Common Area shall be maintained pursuant to the Joint Operations and Maintenance Agreement subject to the specific maintenance duties and obligations set forth herein. Expenses incurred for such maintenance shall be assessed pursuant to the Joint Operations and Maintenance Agreement, shall run with the land and shall be a continuing lien against the Property. The expenses incurred shall be allocated proportionately by dividing the amount of the square footage of the Building owned by such Owner by the total square footage of the Building unless otherwise agreed to in the Joint Operations and Maintenance Agreement. The parties hereto expressly vest in the other Owner the right and power to bring all actions at law or to foreclose on an Owner's lien against such Owner and such Owner's Parcel for the collection of delinquent assessments, pursuant to the terms and conditions as set forth in the Joint Operations and Maintenance Agreement. Each Owner gives the other Owner the right, pursuant to the terms of the Joint Operations and Maintenance Agreement, to record a notice of claim of lien against an Owner and said Owner's Parcel for any delinquent assessments in the Office of the Real Property Records, Ada County, Idaho, and a copy thereof is deposited in the United States mails, certified or registered, postage prepaid, to the Owner of said Parcel at said Owner's last known address. Said notice of claim of lien must contain a sufficient legal description of said Parcel, the record owner or reputed owner thereof and the amount claimed, including the cost of preparing and recording the notice of claim of lien, late charges and interest on said unpaid assessments and costs of collections, including reasonable attorneys fees

Section 2.5. Building Improvements.

(a) Any alterations to the Building must be of Type I, II, III or IV as defined in the 2003 International Building Code Section 602. All modifications and plans to improve the Building comply with the 2003 International Building Code and have been approved by the Division of Building Safety. All modifications to the Building must comply with all applicable governmental rules, laws, regulations and ordinances.

(b) The Building shall not be modified in such a manner as to adversely affect the structural integrity of the Building.

(c) All Service Facilities shall be attractively screened from view from the parking areas.

(d) An open yard of at least sixty (60) feet shall be maintained around the perimeter of the Building at all times; provided, however, the Building may be expanded as long as a sixty (60) foot open yard is maintained around the perimeter Such open yard shall not limit the ability of an Owner to place landscaping parking areas, sidewalks, roadways, lighting and signage in such open yard.

ARTICLE 3
REGULATION OF OPERATIONS AND USES

Section 3.1. Prohibited Uses The following operations and uses shall not be permitted on any portion of the Property subject to this Agreement:

(a) Trailer courts or recreation vehicle campgrounds;

(b) Junk yards or recycling facilities;

(c) Drilling for and removing oil, gas or other hydrocarbon substances;

(d) Refining of petroleum or of its products;

(e) Commercial petroleum storage yards;

(f) Commercial excavation of building or construction materials provided that this prohibition shall not be construed to prohibit any excavation necessary in the course of construction of new Improvements on a Parcel or the Common Areas;

(g) A theater, bowling alley, skating rink, gym, health spa or studio, dance hall, billiard or pool hall, massage parlor, game parlor or video arcade; provided, however, a workout or recreational area for use by the employees and/or students of the Owners is not prohibited hereby;

(h) A bar;

(i) Distillation of bones;

(j) Dumping, disposal, incineration or reduction of garbage, sewage, offal, dead animals or other refuse;

(k) Fat rendering;

(l) Stockyard or slaughter of animals;

(m) Smelting of iron, tin, zinc or any other ore or ores;

(n) Cemeteries;

(o) Jail or honor farms; or

(p) Any use that is not appropriate for a first class property and any use which is in violation of this Agreement, or any statute, law, ordinance, regulation or ruling of any public authority having jurisdiction or could produce adverse effects upon the Property in terms of health, safety or welfare of persons.

Section 3.2. Permitted Uses. Any use or business permitted by the City of Meridian and permitted by current ordinances of the City of Meridian and by the 2003 International Building Code Section 402.2 that is not specifically prohibited in Section 5.1 above and that would not adversely affect the Property or adversely affect any uses to which either of the Parcels is then being put will be permitted. Such uses shall be performed or carried out entirely within the Building such that the enclosed operations and uses do not cause or produce a nuisance to other Parcel, such as, but not limited to, vibration, sound, electro-mechanical disturbances, radiation, air or water pollution, dust or the emission of odorous toxic or nontoxic matter including steam. Certain activities which cannot be carried on within a building may be permitted, provided the other Owner specifically consents to such activity in writing, and further provided such activity is screened so as not to be Visible from the Street The Owners hereby agree that the intended uses of ISU and the School District comply with the 2003 International Building Code Section 402.2.

Section 3.3. Intentionally Omitted.

Section 3.4. Nuisances. No nuisance shall be permitted to exist or operate upon any Parcel so as to be offensive or detrimental to any other Parcel or to its Occupants or the Owner thereof. A "nuisance" shall include, but not be limited to, any of the following conditions:

(a) Any use, including reasonable construction activity, of the Parcel which emits dust, sweepings, dirt or cinders into the atmosphere, or discharges liquid, solid wastes or other matter into any stream, river or other waterway which may adversely affect the health, safety, comfort of, or intended use of their property by persons within the area No waste nor any substance or materials of any kind shall be discharged into any public sewer serving the Property or any part thereof in violation of any regulation of any public body having jurisdiction over such public sewer.

(b) The escape or discharge of any fumes, odors, gases, vapors, steam, acids or other substance into the atmosphere which discharge may be detrimental to the health, safety or welfare of any Person or may interfere with the comfort of persons within the area or which may be harmful to property or vegetation

(c) The radiation or discharge of intense glare or heat, or atomic, electromagnetic, microwave, ultrasonic, laser or other radiation. Any operation producing intense glare or heat or such other radiation shall be performed only within an enclosed or screened area and then only in such manner that the glare, heat or radiation emitted will not be noticeable from the street or other Parcels.

(d) Any use which creates a sound pressure level in violation of any regulation of any public body having jurisdiction or which creates a ground vibration that is perceptible, without instruments, at any point along any of the property lines of a Parcel.

(e) Visible emissions of smoke or steam will not be permitted outside the Building that exceed Ringlemann No. 1 on the Ringlemann Chart of the United States Bureau of Mines. This requirement shall also be applied to the disposal of trash and waste materials Windborne dust, sprays and mists originating in plants are not permitted.

Section 3.5. Condition of Property. No Owner shall allow the portion of the Building located on its Parcel or any other structure upon its Parcel to fall into disrepair, and such portion of the Building and other structures shall at all times be kept in good condition and repair. The Owner or Occupant of any Parcel shall at all times keep its portion of the Building and appurtenances in a safe, clean and wholesome condition and comply, at its own expense, in all respects with applicable governmental, health, fire and safety ordinances, regulations, requirements and directives, and the Owner or Occupant shall at regular and frequent intervals remove at its own expense any rubbish of any character whatsoever that may accumulate within such portion of the Building to a trash collection facility or facilities.

Section 3.6. Remedies for Failure to Maintain and Repair

(a) Remedies. If any Owner shall fail to perform the maintenance and repair required by Section 3.5, then the other Owner, after fifteen (15) days prior written notice to such delinquent Owner, shall have the right, but not the obligation, to perform such maintenance and repair and to charge the delinquent Owner and its Parcel with the cost of such work, together with interest thereon at the rate of fifteen percent (15%) per annum from the date of the advancement of funds for such work to the date of reimbursement by such Owner. If the delinquent Owner shall fail to reimburse the other Owner for such cost within ten (10) days after demand therefor, the non-delinquent Owner may, at any time within six (6) months after such advance, record a claim of lien signed by an authorized agent of the non-delinquent Owner for the amount of such charge, together with interest thereon and enforce the lien in accordance with the provisions of this Agreement.

(b) Nonexclusive Remedy. The foregoing lien and the rights to foreclose thereunder shall be in addition to, and not in substitution for, all other rights and remedies which the non-delinquent Owner may have hereunder and by law, including any suit for specific performance or to recover a money judgment for unpaid assessments.

Section 3.7. Utility Lines and Antennas. No sewer, drainage or utility lines or wires or other devices for the communication or transmission of electric current, power or signals, including telephone, television, microwave or radio signals, shall be constructed, placed or maintained anywhere in or upon any portion of a Parcel, other than within buildings or structures, unless the same shall be contained in conduits or cables constructed, placed or maintained underground or concealed in or under the Building or other structures. Antenna or satellite dishes for the transmission or reception of telephone, television, microwave or radio signals may be placed on any Parcel, but only on the roof of the Building and appropriately screened so as to have minimal visual impact on surrounding streets, public spaces and the Common Areas. The final location and configuration of such antenna or dish must be approved in writing by the other Owner. Nothing contained herein shall be deemed to forbid the erection or use of temporary power or telephone facilities by an Owner incidental to the construction or repair of the portion of the Building located on such Owner's Parcel.

Section 3.8. Fire and Safety Systems. All fire alarms, automatic sprinkler systems, smoke control systems, standby power and emergency voice/alarm communication systems required by the building officials for the operation and treatment of the Building (collectively the "Fire and Safety Systems") shall be maintained as if the Building was owned by one Owner The School District Property Owner shall be responsible for the control and maintenance of the Fire and Safety Systems for the entire Building pursuant to the Joint Operations and Maintenance Agreement. The ISU Property Owner shall be responsible to reimburse the School District Property Owner for such maintenance and control pursuant to the Joint Operations and Maintenance Agreement Both Owners shall insure that the fire department has proper access to the equipment required by the fire department to be maintained on the Property.

Section 3.9. Mechanical Equipment. All mechanical equipment, utility meters, storage tanks, air conditioning equipment and similar items shall be screened with landscaping or attractive architectural features integrated into the structure itself.

Section 3.10. Mineral Exploration. No portion of the Property shall be used in any manner to explore for or to remove any steam, heat, oil or other hydrocarbons, gravel, earth, or any earth substances or other minerals of any kind; provided, however, that this shall not prevent the excavation of earth in connection with the grading or construction of Improvements within a Parcel. Water may be extracted to the extent permitted by the appropriate governmental agency.

ARTICLE 4
DAMAGE OR LOSS TO IMPROVEMENTS

Section 4.1. Restoration of Common Areas. Except as otherwise provided in this Agreement, in the event of any destruction of any portion of the Common Areas other than any portion of the Building, it shall be the duty of the School District Property Owner to restore and repair the same to its former condition, as promptly as practical. The proceeds of any insurance shall be used for such purpose. The Common Areas and all other Improvements located within the Common Areas shall be reconstructed or rebuilt substantially in accordance with the original construction plans if they are available, with such changes as are approved by the Owners In the event that the amount available from the proceeds of such insurance policies for such restoration and repair shall be less than the estimated cost of restoration and repair, a Reconstruction Assessment shall be levied by the School District Property Owner upon the Owners and their Parcels in order to provide the necessary funds for such reconstruction over and above the amount of any insurance proceeds available for such purpose. Reconstruction Assessments shall be borne by the Owners in the same proportions as Common Assessments as set forth in the Joint Operations and Maintenance Agreement.

Section 4.2. Restoration Obligations of Owners. In the event of the damage or destruction of any portion of a Parcel or the portion of the Building thereon, then it shall be the duty of the Owner of such Parcel, as soon as may be practical, to repair and replace the damage or destruction, or such portion thereof as will render such damage or destruction indiscernible from the exterior of the Parcel.

Section 4.3. Condemnation. In the event the whole, or any part, of the Common Areas shall be taken or condemned by any authority exercising the power of eminent domain, the Owners shall appear and defend such proceedings; provided, that if a Parcel is encumbered by a Mortgage or Mortgages which has or have a provision relating to condemnation, then in lieu of distributing the award to the Owner of said Parcel, that Owner's portion of the award shall be paid to the Mortgagee of the Mortgage with the highest priority and seniority for distribution and payment in accordance with the terms and conditions of said Mortgagee's Mortgage

ARTICLE 5
DURATION AND AMENDMENT

Section 5.1. Duration. This Agreement shall be recorded against the Parcels, shall run with the Parcels and shall be perpetual

Section 5.2. Amendment. This Agreement may not be amended without written consent of all Owners. Notwithstanding the foregoing, any of the following amendments, to be effective, must be approved in writing by the record holders of one hundred percent (100%) of the aggregate value of Mortgages encumbering the Property at the time of such amendment and all necessary building officials.

Section 5.3. Governmental Regulation. All valid governmental enactments, ordinances and regulations are deemed to be part of this Agreement and to the extent that they conflict with any provision, covenant, condition or restriction hereof, said conflicting governmental enactment, ordinance and regulation shall control and the provision, covenant, condition or restriction hereof in conflict therewith shall be deemed (i) amended to the extent necessary to bring it into conformity with said enactment, ordinance and regulation while still preserving the intent and spirit of the provision, covenant, condition or restriction or (ii) stricken herefrom should no amendment conforming to the governmental enactment, ordinance or restriction be capable of preserving the intent and spirit of said provision, covenant, condition or restriction.

ARTICLE 6
RIGHT OF FIRST REFUSAL

Section 6.1. Right of First Refusal Granted. ISU hereby grants to the School District and the School District hereby grants to ISU the right of first refusal to purchase such Owner's Parcel, upon the terms and conditions hereinafter set forth.

Section 6.2. Notice of Interest to Purchase In the event an Owner determines that it is going to sell, convey or otherwise transfer its Parcel to a third party pursuant to an offer or bid, said Owner shall provide the other Owner a Transfer Notice which Transfer Notice must set forth the terms and conditions of the third party offer or bid, with a copy of such third party offer or bid attached to the Transfer Notice. Upon receipt of the Transfer Notice, the Owner receiving the Transfer Notice shall have thirty (30) days in which to provide the Owner delivering the Transfer Notice a Notice of Interest, subject to such Owner completing its due diligence and being satisfied, in its discretion, as set forth below. If an Owner fails to timely deliver a Notice of Interest, or if an Owner notifies the other Owner in writing that it declines to purchase the Parcel, the Owner selling the Parcel may proceed with its sale or transfer to the third party so long as such sale or transfer is at a price not less than and on terms not more favorable than the price and terms stated in the third party offer or bid attached to the Transfer Notice. In the event the sale or transfer attached to the Transfer Notice, the right of first refusal set forth herein shall remain in effect.

Section 6.3. Due Diligence Period. If an Owner wishes to purchase the Parcel and sends the Notice of Interest to the other Owner, then the purchasing Owner shall have thirty (30) days in which to perform its due diligence following the selling Owner's receipt of the Notice of Interest. Upon delivery of the Notice of Interest, such Owner shall proceed to conduct any surveys, soils tests, engineering studies, title reviews, and environmental tests and audits which such Owner deems necessary for such Owner to determine the suitability of the Parcel, in such Owner's sole and absolute discretion. If such Owner is satisfied with the results of the due diligence and elects to purchase the Parcel, such Owner shall notify the other Owner in writing, and the parties shall then use their good faith diligent efforts to close on the purchase of the Parcel, but in any event within three (3) months of completion of the due diligence period or otherwise agreed to in writing by the parties, unless such Owner needs to conduct a bond election to generate the funds for the purchase price and then within nine (9) months of completion of the due diligence period or otherwise agreed to in writing by the Owners. At the closing for the Parcel, the Owner selling the Parcel shall convey fee simple title to the Parcel to the Owner purchasing the Parcel, subject only to the following matters: (i) real property taxes, if any, not then delinquent; (ii) all easements, restrictions and covenants of record and/or shown on the final plat or contained in the Joint Operations and Maintenance Agreement entered into between the Owners; and (iii) zoning ordinances, easements and rights of way of record or visible upon the Parcel.

Section 6.4. Purchase Price The purchase price for purchase of the Parcel shall be the lesser of the appraised value of the Parcel, as appraised by an appraiser selected by the Owner selling the Parcel and certified in the State of Idaho and agreed to by the parties, or the amount to be paid by the third party as set forth in the Transfer Notice.

Section 6.5. Closing Costs, Payment of Purchase Price. The Owner purchasing the Parcel shall pay the cost of recording the deed conveying the Parcel. Any escrow fees, and all fees charged by the closing agent, shall be paid equally by ISU and the School District. Taxes, if any, rentals, if any, and utilities shall be prorated as of the time of closing. The Owner selling the Parcel shall pay the premium which would be charged for a standard Owner's policy of title insurance in the amount of the purchase price. The Owner purchasing the Parcel shall pay the amount of any additional premium charged for extended coverage required or desired by the Owner purchasing the Parcel. The Owner selling the Parcel shall pay all other costs including, without limitation, all other recording fees, state documentary stamps, transfer taxes, excise taxes, and assessments for improvements completed prior to the date hereof, whether levied or not. At closing, the Owner purchasing the Parcel shall pay the purchase price, and other amounts owed hereunder, in immediately available funds to an escrow agent established among the parties, and shall instruct such escrow agent to release the same when the deed conveying the Parcel is recorded in compliance herewith.

ARTICLE 7
GENERAL PROVISIONS

Section 7.1. Legal Proceedings. Failure to comply with any of the terms of this Agreement by an Owner or Occupant, his guests, employees, invitees or tenants, shall be grounds for relief which may include, without limitation, an action to recover sums due for damages, injunctive relief, foreclosure of lien, or any combination thereof, which relief may be sought by an aggrieved Owner. Failure to enforce any provision hereof shall not constitute a waiver of the right to enforce said provision, or any other provision hereof. Any Owner (not at the time in default hereunder) shall be entitled to bring an action for damages against any defaulting Owner and, in addition, may enjoin any violation of this Agreement. Any judgment rendered in any action or proceeding pursuant thereto shall include a sum for attorneys' fees, including appeals, in such amount as the Court may deem reasonable, in favor of the prevailing party, as well as the amount of any delinquent payment, together with interest, costs of collection and court costs. Each remedy provided for in this Agreement shall be cumulative and not exclusive or exhaustive

Section 7.2. Severability. The provisions hereof shall be deemed independent and severable, and a determination of invalidity or partial invalidity or enforceability of any one provision or portion hereof by a court of competent jurisdiction shall not affect the validity or enforceability of any other provisions hereof.

Section 7.3. Interpretation. The provisions of this Agreement shall be liberally construed to effectuate its purpose of creating a uniform plan for the operation of the Property and for the maintenance of the Common Areas, and any violation of this Agreement shall be deemed to be a nuisance The article and section headings, titles and captions have been inserted for convenience only, and shall not be considered or referred to in resolving questions of interpretation or construction. Unless the context otherwise requires, as used herein the singular and the plural shall each include the other and the masculine, feminine or neuter shall each include the masculine, feminine and neuter.

Section 7.4. Hold Harmless and Indemnification; Insurance. To the extent permitted by the Idaho Tort Claims Act, Idaho Code § 6-901 et seq., each Owner shall indemnify, defend, protect and hold each other harmless from and against any and all claims of liability for any injury or damage to any person or property arising from School District's or School District's agents and representatives or ISU's or ISU's agents and representatives, use of the Building, Common Area and Property, or from any activity, work or thing done, permitted or suffered by, in or about the Property and Building. The School District and ISU shall further indemnify, defend, protect and hold each other harmless from and against any and all claims arising from any negligent or intentional act or omission by each's respective agents, contractors or employees, and from and against all costs, attorney's fees, expenses and liabilities incurred in the defense of any such action or proceeding brought thereon. In the event any action or proceeding is brought against the School District or ISU, by reason of any such claim, the entity from whose conduct the claim arose shall, upon notice from the School District or ISU, defend it or them at that entity's expense by counsel satisfactory to the entity to whom indemnification is owed.

Section 7.5. Limitation on Liability and Remedies. The School District and ISU, as a material part of the consideration to each other and in recognition of the cooperative relationship of the parties and their desire to provide for continued public use and enjoyment of the Property, do hereby agree to the following limitations on each other's liability arising from and as well as the use of the Building and the Property. To the fullest extent permitted by law, both the School District and ISU, on each other's behalf and on behalf of all persons or entities claiming by and through either, agree to limit the liability of the School District and ISU for any claims, losses, costs, damages of any nature whatsoever or claims or expenses from any cause or causes, so that the total aggregate liability of a claim against either the School District or ISU shall not exceed the amount of collectible liability insurance that the School District and ISU are separately required to maintain hereunder be liable to the other Owner for any injury to any person or damage to the Common Areas or any equipment thereon which may be sustained by reason of the negligence of said Owner or of his guests, employees, invitees or tenants, to the extent that any such damage shall not be covered by insurance. The costs incurred by the other Owner as a result of such damage shall be deemed a Special Assessment of such Owner and its Parcel, and shall be subject to levy, enforcement and collection by the other Owner in accordance with the assessment lien procedure provided in this Agreement.

Section 7.6. No Public Right or Dedication. Nothing contained in this Agreement shall be deemed to be a gift or dedication of all or any part of the Property to the public, or for any public use.

Section 7.7. Nonliability No Person shall be liable to any party for injuries or damage resulting from such Person's acts or omissions within what such Person reasonably believed to be the scope of his duties under this Agreement ("Official Acts"), except to the extent that such injuries or damages result from such Person's malicious or criminal misconduct.

Section 7.8. Notices Except as otherwise provided in this Agreement, in each instance in which notice is to be given to an Owner, the same shall be in writing and may be delivered personally to the Owner, in which case personal delivery of such notice to one or more co-owners of a Parcel or to any general partner of a partnership owning a Parcel shall be deemed delivery to all co-owners or to the partnership, as the case may be. Personal delivery of such notice to any officer or agent for the service of process on a corporation or limited liability company shall be deemed delivery to the corporation or limited liability company, as the case may be. In lieu of the foregoing, such notice may be delivered by certified or registered United States mail, postage prepaid, return receipt required, addressed to the Owner at the most recent address furnished by such Owner to the other Owner or, if no such address shall have been furnished, to the street address of such Parcel. Such notice shall be deemed delivered forty-eight (48) hours after the time of such mailing.

THIS Agreement has been executed on the date first written above and may be executed in any number of original counterparts, each of which shall be deemed an original, but all of which when taken together shall constitute one and the same instrument. The signature and notary acknowledgement pages of any counterpart may be detached therefrom without impairing the legal effect of the signature(s) thereon provided such signature and notary pages are attached to any other counterpart identical thereto except having additional signature and notary pages executed by other parties to this Agreement attached thereto.

BOARD OF TRUSTEES AND STATE BOARD OF EDUCATION OF IDAHO STATE UNIVERSITY

By: ______________________

Name: Kenneth R. Prolo
Title: Vice President for Financial Services Idaho State University

JOINT SCHOOL DISTRICT NO. 2, ADA AND CANYON COUNTIES, IDAHO

By: ______________________

Name: Linda Clark

Title: Superintendent

04636.0064.915404.6

STATE OF IDAHO)
) ss.
County of Bannock)

On this 5th day of June, 2007, before me, Rita Magee, a Notary Public in and for said State, personally appeared Kenneth R. Prolo, known or identified to me to be the Vice President for FINANCIAL SERVICES IDAHO STATE UNIVERSITY, the entity that executed the within instrument or the person who executed the instrument on behalf of said entity, and acknowledged to me that such entity executed the same.

IN WITNESS WHEREOF, I have hereunto set my hand and affixed my official seal the day and year in this certificate first above written.

RITA MAGEE
NOTARY
PUBLIC
STATE OF IDAHO

Rita Magee
Notary Public for Idaho
Residing at Pocatello, ID
My commission expires 6/8/10

04636.0064.915404.6

delivered by certified or registered United States mail, postage prepaid, return receipt required, addressed to the Owner at the most recent address furnished by such Owner to the other Owner or, if no such address shall have been furnished, to the street address of such Parcel. Such notice shall be deemed delivered forty-eight (48) hours after the time of such mailing.

THIS Agreement has been executed on the date first written above and may be executed in any number of original counterparts, each of which shall be deemed an original, but all of which when taken together shall constitute one and the same instrument. The signature and notary acknowledgement pages of any counterpart may be detached therefrom without impairing the legal effect of the signature(s) thereon provided such signature and notary pages are attached to any other counterpart identical thereto except having additional signature and notary pages executed by other parties to this Agreement attached thereto.

BOARD OF TRUSTEES AND STATE BOARD OF
EDUCATION OF IDAHO STATE UNIVERSITY

By: ______________________________

Name: Kenneth R. Prolo
Title: Vice President for Financial Services Idaho State University

JOINT SCHOOL DISTRICT NO. 2, ADA
AND CANYON COUNTIES, IDAHO

By: ______________________________

Name: Linda Clark

Title: Superintendent

16

04636 0064 915404 6

STATE OF IDAHO)
) ss
County of Ada)

On this 29th day of November, 2007, before me, Patricia A. Duncan, a Notary Public in and for said State, personally appeared Linda Clark, known or identified to me to be the Superintendent of JOINT SCHOOL DISTRICT NO. 2, ADA AND CANYON COUNTIES, IDAHO, the entity that executed the within instrument or the person who executed the instrument on behalf of said entity, and acknowledged to me that such entity executed the same

IN WITNESS WHEREOF, I have hereunto set my hand and affixed my official seal the day and year in this certificate first above written

PATRICIA A. DUNCAN
NOTARY PUBLIC
STATE OF IDAHO

Patricia A. Duncan
Notary Public for Idaho
Residing at Meridian, Idaho
My commission expires 3-27-09

04636 0064 915404 6

EXHIBIT "A"
LEGAL DESCRIPTION OF SCHOOL DISTRICT PROPERTY

52423\01000\289733 V02 DNL

04636 0064 915404 6

PARCEL DESCRIPTION April 12, 2007

Project: Jabil Property -- Hummel Architects

Parcel Type: Remainder - A Portion of Parcel "A" of ROS No. 6631 and that portion of Locust Grove Rd. R/W West of the Section line.

A parcel of land being a portion of Parcel "A" of Record of Survey No. 6631, situated in the SE 1/4 of Section 18, Township 3 North, Range 1 East, Boise Meridian, City of Meridian, Ada County, Idaho, more particularly described as follows:

COMMENCING at a found 3" brass cap, Corner Record Instrument No. 103176248, marking the Southeast corner of said Section 18;

Thence North 00°30'34" East, coincident with the east line of said Section 18, also being the centerline of Locust Grove Rd., a distance of 1281.66 feet to the intersection of said east line (centerline of Locust Grove Rd.) and the northerly right-of-way of Interstate Highway 84 and the POINT OF BEGINNING;

Thence North 89°33'08" West, coincident with said northerly right-of-way line, a distance of 330.29 feet;

Thence North 00°00'00" East, a distance of 442.71 feet;

Thence North 90°00'00" West, a distance of 354.53 feet;

Thence South 00°00'00" East, a distance of 10.00 feet;

Thence North 90°00'00" West, coincident with the centerline of an existing wall within the Jabil Circuit building extended, a distance of 105.95 feet to the centerline intersection of an existing wall within the Jabil Circuit building;

Thence North 00°00'00" East, coincident with the centerline of an existing wall within the Jabil Circuit building, a distance of 70.23 feet to the centerline intersection of an existing wall within the Jabil Circuit building;

Thence North 90°00'00" West, coincident with the centerline of an existing wall within the Jabil Circuit building, a distance of 401.42 feet to the centerline intersection of an existing wall within the Jabil Circuit building;

Thence South 00°00'00" East, coincident with the centerline of an existing wall within the Jabil Circuit building, a distance of 203.23 feet to the centerline intersection of an existing wall within the Jabil Circuit building;

Thence North 90°00'00" West, coincident with the centerline of an existing wall within the Jabil Circuit building, a distance of 10.00 feet to the centerline intersection of an existing wall within the Jabil Circuit building;

Thence North 00°00'00" East, coincident with the centerline of an existing wall within the Jabil Circuit building, a distance of 14.26 feet to the centerline intersection of an existing wall within the Jabil Circuit building;

Thence North 90°00'00" West, coincident with the centerline of an existing wall within the Jabil Circuit building extended, a distance of 161.99 feet;

Thence South 00°00'32" West, a distance of 326.77 feet to the northerly right-of-line of Interstate Highway 84;

Thence North 89°33'30" West, coincident with said northerly right-of-way line, a distance of 401.46

Thence North 28°26'58" West, a distance of 49.59 feet;

Thence South 89°37'32" West, along the northerly line of the SE 1/4 SW 1/4 of Section 18, a distance of 64.81 feet to the southwest corner of said Parcel "A" of said Record of Survey No. 6631;

Thence leaving said right-of-way and along the westerly line of said Parcel "A" the following four courses:

Thence North 00°00'40" West, a distance of 128.95 feet;

Thence North 89°58'05" East, a distance of 94.70 feet;

Thence North 56°08'43" East, a distance of 40.08 feet;

Thence North 00°00'39" West, a distance of 764.91 feet to a point on the southerly right-of-way of East Central Drive;

Thence along said southerly right-of-way the following five courses:

Thence North 89°38'50" East, a distance of 860.51 feet to a point of curvature;

Thence 37.04 feet along a tangent curve the right, having a radius of 148.00 feet, a central angle of 14°20'17", and subtended by a chord bearing South 83°11'01" East a distance of 36.94 feet to a point of tangency;

Thence South 76°00'53" East, a distance of 355.52 feet to a point of curvature;

Thence 14.87 feet along a tangent curve the left, having a radius of 212.00 feet, a central angle of 04°01'09", and subtended by a chord bearing South 78°01'27" East a distance of 14.87 feet to a point of non-tangent compound curvature;

Thence 69.25 feet along a curve the left, having a radius of 332.00 feet, a central angle of 11°57'05", and subtended by a chord bearing South 84°01'48" East a distance of 69.13 feet to a point at the centerline of the Hunter Lateral;

Thence, coincident with the centerline of the Hunter Lateral the following four courses:

Thence South 23°43'57" East, a distance of 100.52 feet;

Thence South 32°25'35" East, a distance of 227.53 feet;

Thence South 35°12'46" East, a distance of 277.92 feet;

Thence South 41°34'55" East, a distance of 121.13 feet to a point on said east line of Section 18 and the centerline of said Locust Grove Rd.;

Thence, South 00°30'34" West, coincident with said east line of said Section 18, also being the centerline of Locust Grove Rd., a distance of 255.28 feet to the POINT OF BEGINNING.

The parcel above described contains 23.300 acres, more or less.

Together with and subject to covenants, easements, and restrictions of record.

PROFESSIONAL LAND SURVEYOR REGISTERED 10729 STATE OF IDAHO TRAVIS P. FOSTER

Travis P. Foster, P.L.S. 4/12/07 License No. 10729

End of Description

EXHIBIT "B"

LEGAL DESCRIPTION OF THE ISU PROPERTY

52423\01000\289733 V02 DNL

04636 0064 915404 6

Lot 2 in Block 1 of Joint No. 2 Subdivision Phase 1, according to the official plat thereof, filed in Book 99 of Plats at Page(s) 12828, through 12830, records of Ada County, Idaho.

PARCEL DESCRIPTION April 12, 2007

Project: Jabil Property – Hummel Architects

Parcel Type: Remainder - A Portion of Parcel "A" of ROS No. 6631 and that portion of Locust Grove Rd. R/W West of the Section line.

A parcel of land being a portion of Parcel "A" of Record of Survey No. 6631, situated in the SE 1/4 of Section 18, Township 3 North, Range 1 East, Boise Meridian, City of Meridian, Ada County, Idaho, more particularly described as follows:

COMMENCING at a found 3" brass cap, Corner Record Instrument No. 103176248, marking the Southeast corner of said Section 18;

Thence North 00°30'34" East, coincident with the east line of said Section 18, also being the centerline of Locust Grove Rd., a distance of 1281.66 feet to the intersection of said east line (centerline of Locust Grove Rd.) and the northerly right-of-way of Interstate Highway 84 and the POINT OF BEGINNING;

Thence North 89°33'08" West, coincident with said northerly right-of-way line, a distance of 330.29 feet;

Thence North 00°00'00" East, a distance of 442.71 feet;

Thence North 90°00'00" West, a distance of 354.53 feet;

Thence South 00°00'00" East, a distance of 10.00 feet;

Thence North 90°00'00" West, coincident with the centerline of an existing wall within the Jabil Circuit building extended, a distance of 105.95 feet to the centerline intersection of an existing wall within the Jabil Circuit building;

Thence North 00°00'00" East, coincident with the centerline of an existing wall within the Jabil Circuit building, a distance of 70.23 feet to the centerline intersection of an existing wall within the Jabil Circuit building;

Thence North 90°00'00" West, coincident with the centerline of an existing wall within the Jabil Circuit building, a distance of 401.42 feet to the centerline intersection of an existing wall within the Jabil Circuit building;

Thence South 00°00'00" East, coincident with the centerline of an existing wall within the Jabil Circuit building, a distance of 203.23 feet to the centerline intersection of an existing wall within the Jabil Circuit building;

Thence North 90°00'00" West, coincident with the centerline of an existing wall within the Jabil Circuit building, a distance of 10.00 feet to the centerline intersection of an existing wall within the Jabil Circuit building;

Thence North 00°00'00" East, coincident with the centerline of an existing wall within the Jabil Circuit building, a distance of 14.26 feet to the centerline intersection of an existing wall within the Jabil Circuit building;

Thence North 90°00'00" West, coincident with the centerline of an existing wall within the Jabil Circuit building extended, a distance of 161.99 feet;

Thence South 00°00'32" West, a distance of 326.77 feet to the northerly right-of-line of Interstate Highway 84;

Thence North 89°33'30" West, coincident with said northerly right-of-way line, a distance of 401.46

Thence North 28°26'58" West, a distance of 49.59 feet;

Thence South 89°37'32" West, along the northerly line of the SE 1/4 SW 1/4 of Section 18, a distance of 64.81 feet to the southwest corner of said Parcel "A" of said Record of Survey No. 6631;

Thence leaving said right-of-way and along the westerly line of said Parcel "A" the following four courses:

Thence North 00°00'40" West, a distance of 128.95 feet;

Thence North 89°58'05" East, a distance of 94.70 feet;

Thence North 56°08'43" East, a distance of 40.08 feet;

Thence North 00°00'39" West, a distance of 764.91 feet to a point on the southerly right-of-way of East Central Drive;

Thence along said southerly right-of-way the following five courses:

Thence North 89°38'50" East, a distance of 860.51 feet to a point of curvature;

Thence 37.04 feet along a tangent curve the right, having a radius of 148.00 feet, a central angle of 14°20'17", and subtended by a chord bearing South 83°11'01" East a distance of 36.94 feet to a point of tangency;

Thence South 76°00'53" East, a distance of 355.52 feet to a point of curvature;

Thence 14.87 feet along a tangent curve the left, having a radius of 212.00 feet, a central angle of 04°01'09", and subtended by a chord bearing South 78°01'27" East a distance of 14.87 feet to a point of non-tangent compound curvature;

Thence 69.25 feet along a curve the left, having a radius of 332.00 feet, a central angle of 11°57'05", and subtended by a chord bearing South 84°01'48" East a distance of 69.13 feet to a point at the centerline of the Hunter Lateral;

Thence, coincident with the centerline of the Hunter Lateral the following four courses:

Thence South 23°43'57" East, a distance of 100.52 feet;

Thence South 32°25'35" East, a distance of 227.53 feet;

Thence South 35°12'46" East, a distance of 277.92 feet;

Thence South 41°34'55" East, a distance of 121.13 feet to a point on said east line of Section 18 and the centerline of said Locust Grove Rd.;

Thence, South 00°30'34" West, coincident with said east line of said Section 18, also being the centerline of Locust Grove Rd., a distance of 255.28 feet to the **POINT OF BEGINNING.**

The parcel above described contains 23.300 acres, more or less.

Together with and subject to covenants, easements, and restrictions of record.

PROFESSIONAL LAND SURVEYOR REGISTERED 10729 STATE OF IDAHO TRAVIS P. FOSTER

Travis P. Foster, P.L.S. 4/12/07 License No. 10729

End of Description

EXHIBIT "C"

PARKING LOT,
STORAGE ROOM AND
ELECTRICAL ROOM

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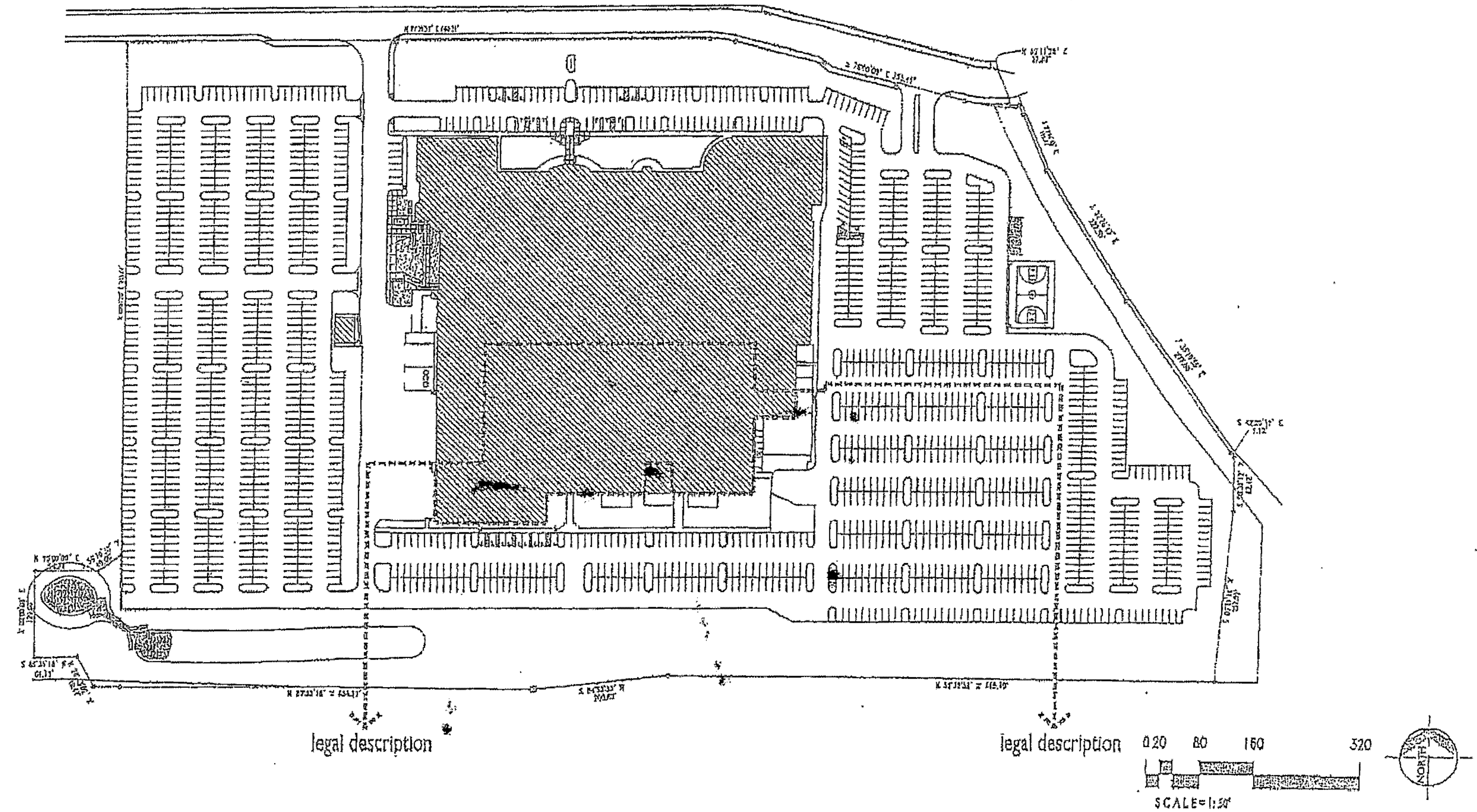
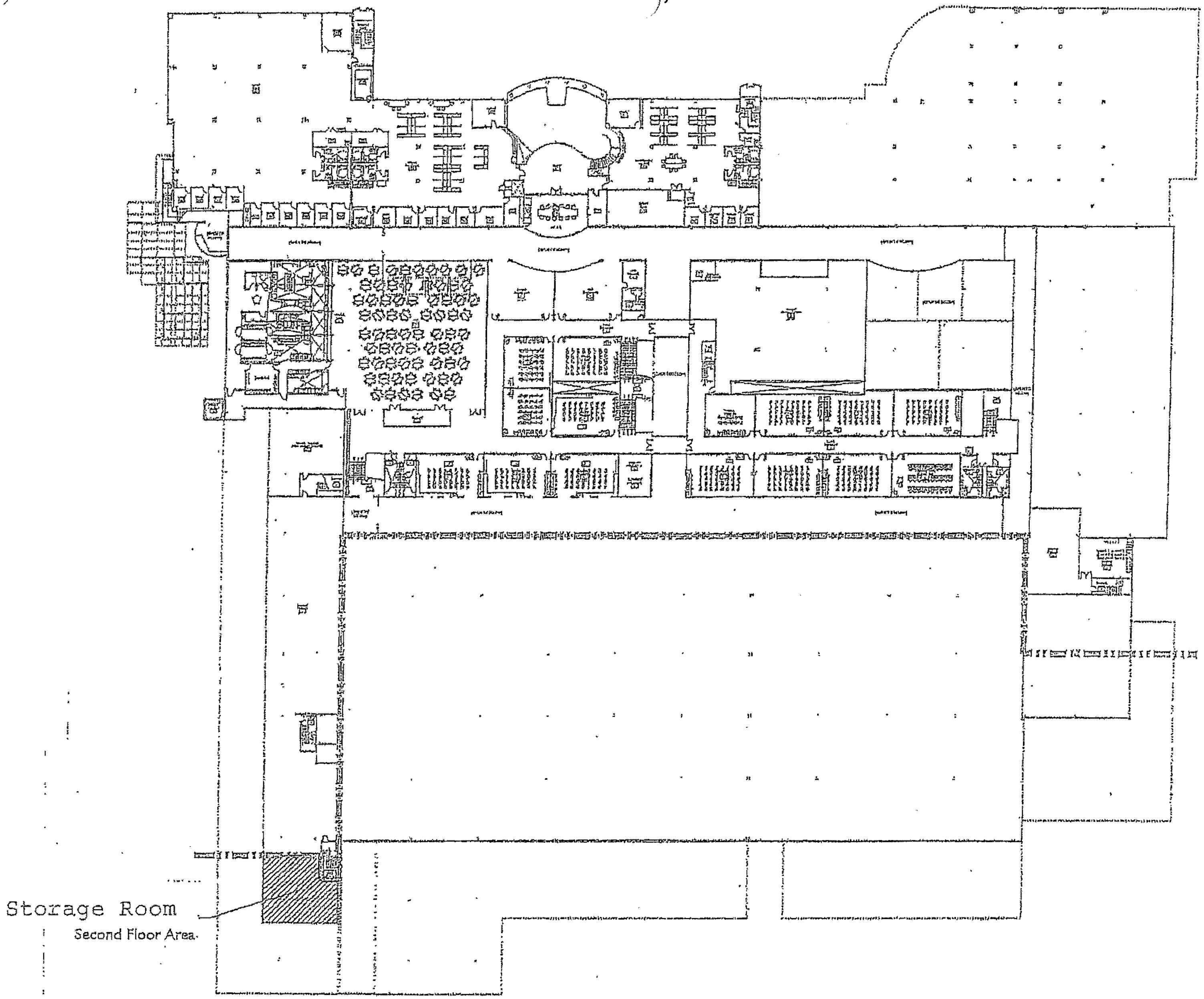


SITE PLAN	JOINT SCHOOL DISTRICT - MASTER SITE PLAN	SCHEMATIC DESIGN
JAN. 17th, 2007	JOINT SCHOOL DISTRICT NO. 2 MERIDIAN, IDAHO	HUMMEL ARCHITECTS PLLC



SECOND FLOOR PLAN SCALE: 1" = 30'	JOINT SCHOOL DISTRICT - MASTER FLOOR PLAN	SCHEMATIC DESIGN
APRIL 5th, 2007	JOINT SCHOOL DISTRICT NO. 2 MERIDIAN, IDAHO	HUMMEL ARCHITECTS PLLC

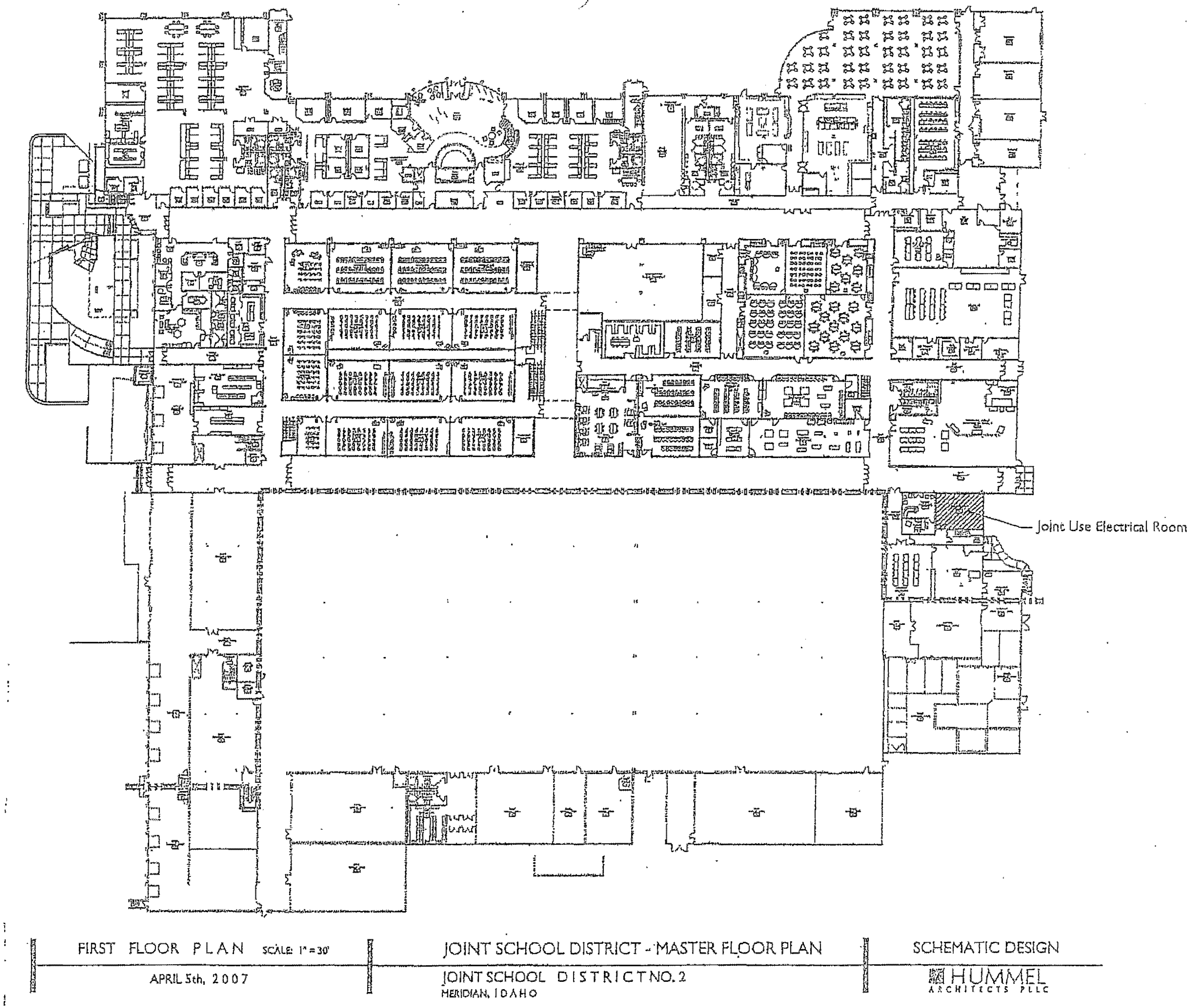

Joint Use Electrical Room
FIRST FLOOR PLAN SCALE: 1" = 30'
APRIL 5th, 2007
JOINT SCHOOL DISTRICT - MASTER FLOOR PLAN
JOINT SCHOOL DISTRICT NO. 2
MERIDIAN, IDAHO
SCHEMATIC DESIGN
HUMMEL ARCHITECTS PLLC

EXHIBIT "E"

JOINT OPERATIONS AND MAINTENANCE AGREEMENT

JOINT OPERATIONS AND MAINTENANCE AGREEMENT

THIS JOINT OPERATIONS AND MAINTENANCE AGREEMENT is made on December 4, 2007, by the BOARD OF TRUSTEES AND STATE BOARD OF EDUCATION OF IDAHO STATE UNIVERSITY ("ISU") and JOINT SCHOOL DISTRICT NO. 2, Ada and Canyon Counties, Idaho, an Idaho school district ("School District").

PREAMBLE:

A. The School District is the owner of certain real property located in the City of Meridian, County of Ada, State of Idaho, described in Exhibit "A" attached hereto and by this reference incorporated herein (the "School District Property"). ISU is the owner of certain real property located in the City of Meridian, County of Ada, State of Idaho, described in Exhibit "B" attached hereto and by this reference incorporated herein (the "ISU Property"; the ISU Property and the School District Property are herein collectively called the "Property").

B. Concurrently with the recording of this Agreement, School District has conveyed the ISU Property to ISU The parties have determined that it is desirable and necessary, for the efficient preservation of the values of the Property and for the maintenance and preservation of the Building (as defined below) and the Common Areas (as defined below) to enter into this Agreement for the purpose of maintaining and administering the Common Areas and enforcing the covenants, conditions and restrictions herein contained, and collecting and disbursing the assessments and charges hereinafter created.

C ISU and the School District have entered into that certain "Master Declaration Agreement" which encumbers the Property and is recorded concurrently herewith ("**Declaration**"). Pursuant to the Declaration the Owners have imposed certain restrictions on their Parcels and have executed reciprocal easements each in favor of the other covering the Common Area (defined below).

D. ISU and the School District hereby declare that they desire to enter into an agreement which governs the joint use and maintenance of the Property and provides for the common operation, cleaning, maintenance, repair, replacement and insurance of the Common Area. The rights, duties and obligations set forth herein shall inure to the benefit of each Owner, and shall be binding on any Owners successors and assigns, and may be enforced by any Owner

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ARTICLE 1
DEFINITIONS

The following words, when used in this Agreement and in any amendment to this Agreement, unless otherwise provided, shall have the following meanings:

Section 1.1. "Agreement" shall mean this Joint Operations and Maintenance Agreement, as it may be amended from time to time as provided herein.

Section 1.2. "Building" means the building located on the Property known as the District Services Center.

Section 1.3. "Capital Improvement Assessment" shall mean a charge against each Owner and its Parcel, representing a portion of the cost to the Owners for installation or construction of any capital improvements on any of the Common Areas, including landscaping, which the Owners may from time to time authorize in accordance with Section 2.6 this Agreement.

Section 1.4. "Common Areas" shall mean any portion of the Property, including the Improvements thereon, which are used in common by the Owners or maintained in common by the Owners, including, but not limited to (a) all roadways within the Property, (b) any landscaping located within the Property, (c) all parking areas within the Property, (d) outside and parking lot lighting and signage within the Property, (e) sidewalks within the Property, (f) the exterior of the Building and the roof, and (g) any Improvements which are restricted to a use or uses beneficial to the Owners in common by reason of requirements imposed upon the Property by governmental entities, including but not limited to the electrical room and the storage room, as depicted on Exhibit "C" attached hereto, regardless of whether such Improvement are located within the Building.

Section 1.5. "Common Assessments" shall mean the annual charge against each Owner and its Parcel, representing a portion of the total ordinary costs of maintaining, operating, improving, repairing, replacing and managing the Common Areas, and reasonable reserves therefor, which charge shall be paid by each Owner to satisfy Common Expenses as further provided herein.

Section 1.6. "Common Expenses" shall mean the actual and estimated costs of maintenance, management, operation, repair and replacement of the Common Areas (including unpaid Special Assessments and Capital Improvement Assessments) including, but not limited to, reasonable compensation paid by the School District to building supervisors, managers, accountants, attorneys and employees engaged in maintaining, managing, operating, repairing and replacing the Common Areas; the costs of all commonly metered charges for the Property, including but not limited to the costs associated with the lighting in the parking lot; the costs of maintaining, repairing and

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replacing the Fire Safety Systems (as defined below); the costs of all services benefiting the Common Areas; taxes and assessments, if any, for any of the Common Areas which is not taxed directly to an Owner; and the costs of any other item or items for the benefit of all of the Owners.

Section 1.7. "Fire Safety Systems" shall mean all fire alarm systems, smoke control systems, standby power systems, emergency voice/alarm communication systems, and sprinkler systems, and any other system or device connected to the fire alarm system for the in Building.

Section 1.8. "Improvement" shall mean the exterior of all structures and appurtenances thereto of every kind, whether above or below the land surface, including, but not limited to, the exterior of the Building, utility systems, drainage systems, walkways, driveways, parking areas, standby power systems, fire alarm and control systems, emergency voice and alarm communication systems, smoke control systems, landscaping items, fences, landscaping vegetation, wetland improvements and improvements to wetland buffer areas, irrigation systems, signs, exterior fixtures and any structure of any kind.

Section 1.9. "Occupant" shall mean a lessee or licensee of an Owner, or any other Person other than an Owner in lawful possession of a Parcel, or a portion of a Parcel, with the permission of the Owner.

Section 1.10. "Owner" shall mean the Person, including ISU and the School District, holding fee simple title of record to a Parcel, including purchasers under executory contracts of sale. "Owners" shall mean all of the owners of Parcels within the Property

Section 1.11. "Owners Committee" shall mean a committee composed of representatives of the Owners who shall meet and decide certain matters related to the Common Areas set forth in these Articles. The Owners Committee will be comprised of two representatives designated by each Owner, for a total of four (4) members. Matters requiring Owners Committee approval will be decided by consensus or unanimous vote. If the event there is not a consensus or unanimous vote, the Owners Committee will be deemed to have rejected or denied the request or proposal.

Section 1.12. " "Parcel" shall mean each of the ISU Property and the School District Property or any portion therein.

Section 1.13. "Person" shall mean a natural individual, corporation or any other entity with the legal right to hold title to real property

Section 1.14. "Property" shall mean all of the Parcels.

Section 1.15. "Reconstruction Assessment" shall mean a charge against each Owner and its Parcel, representing a portion of the cost for repair or replacement of any portion of damaged or lost Improvements in the Common Areas, as provided for in this Agreement.

Section 1.16. "Service Facilities" shall mean loading docks, trash enclosures and compactors, exterior coolers, electrical and refrigeration facilities and other similar service facilities.

Section 1.17. "Signs" shall mean any structure, device or contrivance, electric or non-electric, upon or within which any poster, bill, bulletin, printing, lettering, painting, device or other advertising of any kind whatsoever is used, placed, posted, tacked, nailed, pasted or otherwise fastened or affixed

Section 1.18. "Special Assessment" shall mean a charge against a particular Owner and its Parcel, directly attributable to, or reimbursable by, said Owner, equal to the cost incurred by the other Owner for corrective action performed pursuant to the provisions of this Agreement, plus interest and other charges thereon, as provided for in this Agreement.

Section 1.19. "Street" shall mean any street, driveway, lane, place or other thoroughfare either within or adjacent to the Property or as so used as a part of the Common Areas.

Section 1.20. "Visible from the Street" shall mean, with respect to any given object on a Parcel, that such object is or would be visible to a person six (6) feet tall, standing at ground level on a Street.

ARTICLE 2
REPAIR AND MAINTENANCE DUTIES; COVENANTS FOR MAINTENANCE ASSESSMENTS AND ENFORCEMENT THEREOF

Section 2.1. Repair and Maintenance Duties of the School District Subject to its receipt of ISU's share of Capital Improvement Assessments, Common Assessments, Reconstruction Assessments and Special Assessments, the School District shall maintain, repair, replace, resurface and make necessary improvements to the Common Areas and perform all items of common or shared maintenance required under the Declaration, to assure the maintenance of the Common Areas and perform all items of common or shared maintenance required under the Declaration, including, without limitation, all Improvements thereon, in a first class, sanitary and attractive condition The School district shall have the right to perform such duties through the use of its own employees or shall contract for such maintenance, repair and improvements. Such maintenance, repairs and improvements shall include, without limitation (a) maintenance and replacement of shrubs, trees, vegetation, irrigation systems and other landscaping Improvements located on the Common Areas, mechanical and electrical equipment in the Common Areas; (b) repair and maintenance of all recreational areas, walks and other means of ingress and egress within the Common Areas; (c) maintenance of a central trash collection facility or facilities; (d) mechanical and electrical equipment; (e) repaving, resurfacing and re-striping of the parking lot; and (f) maintenance, repair and improvement of all Fire Safety Systems for the Building together with any other mechanical or other system providing common service or required to be maintained in common

Section 2.2. Payment for Common Maintenance. All such maintenance, repairs and improvements to the Common Areas shall be paid for as Common Expenses Subject to applicable bidding laws, and with the advice and input of the Owners Committee, the School District may enter into a management service contract to perform said services, but not for a term in excess of one (1) year; provided, however, before entering into such a management service contract the School District shall first offer to ISU the right to perform said services; provided, further, however, that ISU must have the same or better experience as a management service provider and must be able to perform said services at a price which is competitive with a management service provider. In the event the School District, or its successors and assigns, should desire to not perform the foregoing obligations and ISU, or its successors and assigns is willing to perform said obligations, the parties shall execute and record an amendment to this Agreement which shall provide for ISU or its successor and assigns to perform said obligations.

Section 2.3. Fire Equipment. The School District shall be responsible for insuring that the necessary equipment is accessible for the Meridian Fire Department for the entire Building ISU shall reimburse the School District, as part of the Common Assessment, for any and all costs associated therewith, including but not limited to any costs incurred as a result of the School District's inability to properly access the Building in order to maintain the necessary fire equipment ISU hereby agrees to insure that the fire equipment is in no way obstructed or that the School District's ability to maintain the fire equipment for the Meridian Fire Department.

Section 2.4. Creation of the Lien and Personal Obligations of Assessments. ISU and the School District hereby covenant and agree to pay, and each successor Owner, by acceptance of a deed to a Parcel, whether or not it shall be so expressed in any such deed, is deemed to covenant and agree to pay, to the School District all Common Assessments for Common Expenses and all applicable Special Assessments, Reconstruction Assessments and Capital Improvement Assessments All such assessments, together with interest, costs and reasonable attorneys fees, shall be a charge and a continuing lien against the Parcel against which each such assessment is made and shall also be a separate, distinct and personal obligation of the Owner at the time the assessments fall due, and shall bind his heirs, successors in interest, devisees, personal representatives and assigns This personal obligation cannot be avoided by abandonment of the Parcel or Improvements thereon or by an offer to waive use of the Common Areas.

Section 2.5. Purpose of Assessments. The assessments levied pursuant to this Agreement shall be used to promote the health, safety, welfare and general benefit of the Owners and their employees and for the operation, replacement, improvement and maintenance of the Common Areas. All assessments must be used solely for the common benefit of the Owners for purposes authorized by this Agreement, as it may be amended from time to time. Disbursements by the School Distinct Property Owner shall be made for such purposes as may be necessary for the discharge of its responsibilities herein for the common benefit of the Owners.

Section 2.6. Determination of Common Assessments. No later than October 1 of each calendar year, the School District shall prepare and provide to ISU an estimate of the Common Assessments for the following calendar year, broken down by Parcel, including a reasonable provision for contingencies and reserves for infrequently recurring expenditures Without first receiving the approval of ISU, the School District may increase the annual Common Assessment against each Owner and the interest of such Owner in its Parcel in any calendar year by an amount not in excess of twenty percent (20%) of the annual Common Assessment levied in the preceding calendar year. Any increase in excess of twenty percent (20%) shall require the prior approval of both Owners Not later than ninety (90) days after the end of each calendar year, the School District shall prepare and distribute to ISU an annual report, including a balance sheet and an income statement reflecting the total income and Common Expenses during such calendar year in performing its functions under this Agreement. Common Assessments relating to Common Expenses shall be borne by the Owners and their Parcels proportionately by dividing the amount of the square footage of the Building owned by such Owner by the total square footage of the Building. Such proportionate share shall be reallocated monthly based upon any improvements or additions made to the Building. ISU shall pay to the School District its annual Common Assessment in installments at monthly intervals, or at such frequency and in such amounts as may hereafter be agreed upon by the Owners In the event that the School District shall determine that the estimate of total charges for the current year is, or will become, inadequate to meet all Common Expenses for any reason, it shall immediately determine the approximate amount of such inadequacy and inform ISU. The School District shall have the authority to levy at any time a supplemental Common Assessment reflecting a revision of the total charges to be assessed against each Owner and the interest of such Owner in its Parcel, which supplemental Common Assessment shall not exceed: (1) twenty percent (20%) of the then current Common Assessment, if the current Common Assessment has been previously approved by the Owners, or (2) if the current Common Assessment has not been so approved, twenty percent (20%) of the previous year's Common Assessment. To the extent that any supplemental Common

Assessment or the aggregate of any supplemental Common Assessments in any calendar year exceeds the foregoing, such excess shall require the prior approval of the Owners. Written notice of any change in the amount of Common Assessments shall be given to ISU not less than thirty (30) days prior to the effective date of such change.

Section 2.7. Collection of Common Assessments. Within thirty (30) days of execution of this Agreement, the School District shall fix and collect from each Owner its pro-rata share of the Common Assessments. Each Owner shall make payment of its pro-rata share of the Common Assessments on the first day of the month thereafter. Common Assessments for fractions of any period involved shall be prorated. At the end of any calendar year, the Owners may determine that all excess assessment funds be returned to the Owners proportionately or be retained by the School District and used to reduce the following year's Common Assessments. In any voluntary or involuntary conveyance of a Parcel, the new Owner ("Purchaser") shall be jointly and severally liable with the previous Owner ("Seller") for all unpaid installments of assessments levied by the School District against the Seller for its share of the Common Expenses up to the date of Close of Escrow of the conveyance, without prejudice to the right of the Purchaser to collect from the Seller therefor However, any such Purchaser shall be entitled to a statement from the School District setting forth the amount of the unpaid assessments against the Seller due the School District as of the date the School District receives the request by such Purchaser, provided, however, that the Purchaser shall be personally liable for any and all installments of assessments and other charges becoming due after the Close of Escrow for the conveyance.

Section 2.8. Capital Improvement Assessments. Should the Owners determine the need for a capital improvement or replacement expenditure, the cost of which is in excess of Fifty Thousand and No/100 Dollars ($50,000 00), or which will materially affect, reduce or impede the use of the Common Area, then approval by both Owners shall be required to approve and render effective a Capital Improvement Assessment to cover the cost of such expenditure. Such Capital Improvement Assessment shall be prorated based on the same proportionate share as the Common Area Assessment

ARTICLE 3
NONPAYMENT OF ASSESSMENTS

Section 3.1. Delinquency. Any installment of an assessment provided for in this Agreement shall become delinquent if not paid on the due date. With respect to each installment of an assessment not paid within ten (10) days after its due date, the non-delinquent Owner may, at its election, require the delinquent Owner to pay a "late charge" in a sum equal to six percent (6%) of such delinquent installment, together with interest on such delinquent sums at a rate equal to fifteen percent (15%) per annum, calculated from the date of delinquency to and including the date full payment is received by the non-delinquent Owner. If any installment of an assessment is not paid within thirty (30) days after its due date, the non-delinquent Owner may mail a notice to the delinquent Owner. The notice shall specify: (1) the fact that the installment is delinquent; (2) the action required to cure the default; (3) a date not less than three (3) days from the date the notice is mailed to the delinquent Owner by which date such default must be cured; and (4) that failure to cure the default on or before the date specified in the notice may result in acceleration of the balance of the installments of the assessments for the then current fiscal year and sale of the Owner's interest in its Parcel. The notice shall further inform the delinquent Owner of its right, if any, to cure after acceleration. If the delinquent installments of the assessments and any charges thereon are not paid in full on or before the date specified in the notice, the non-delinquent Owner, at its option, may declare all of the unpaid balance of the assessments for the then current fiscal year attributable to the delinquent Owner and its Parcel or interest therein to be immediately due and payable without further demand and may enforce the collection of the assessments and all charges thereon in any manner authorized by law or by this Agreement.

Section 3.2. Lien and Notice of Lien. Each Owner vests in the other Owner the right and power to bring all actions at law or to foreclose the non-delinquent Owner's lien provided for in Section 3.1 above against an Owner and such Owner's Parcel for the collection of delinquent assessments. No action shall be brought to foreclose said delinquent assessment lien or to proceed under the power of sale herein provided sooner than thirty (30) days after the date a notice of claim of lien is recorded by the non-delinquent Owner in the Office of the Real Property Records, Ada County, Idaho, and a copy thereof is deposited in the United States mails, certified or registered, postage prepaid, to the Owner of said Parcel at said Owner's last known address. Said notice of claim of lien must contain a sufficient legal description of said Parcel, the record owner or reputed owner thereof and the amount claimed, including the cost of preparing and recording the notice of claim of lien, late charges and interest on said unpaid assessments and costs of collections, including reasonable attorneys fee.

Section 3.3. Foreclosure and Sale. Any such foreclosure and sale provided for above shall be conducted in accordance with the laws of the State of Idaho applicable to the exercise of powers of foreclosure and sale of mortgages. The non-delinquent Owner, through its duly authorized agents, shall have the power to bid on the Parcel at the foreclosure sale and to acquire and hold, lease, mortgage and convey the same.

Section 3.4. Curing the Default. Upon the timely curing of any default for which a notice of claim of lien was recorded by the non-delinquent Owner, the non-delinquent Owner shall record an appropriate release of such notice, upon payment by the defaulting Owner of all fees to cover the cost of preparing and recording such release, together with the payment of such other costs, interest and fees as shall have been incurred by the non-delinquent Owner by reason of such default. Any purchaser or encumbrancer who has acted in good faith and extended value may rely upon such release as conclusive evidence of the full satisfaction of the sums stated in the notice of claim of lien.

Section 3.5. Cumulative Remedies. The assessment lien and right of foreclosure and sale thereunder shall be in addition to, and not in substitution for, all other rights and remedies which the non-delinquent Owner may have hereunder and by law, including a suit to recover a money judgment for unpaid assessments, but any institution of a suit to recover a money judgment shall not constitute an affirmation of the adequacy of money damages.

Section 3.6. Subordination of Assessment Liens. All sums assessed in accordance with the provisions of this Agreement shall constitute a lien on the respective Parcel prior and superior to all other liens, except (1) all taxes, bonds, assessments and other levies or liens which, by law, would be superior thereto, and (2) the lien or charge of any Mortgage of Record made in good faith and for value and recorded prior to the date on which the notice of claim of lien is recorded Upon the foreclosure of, or the acceptance of a deed in lieu of foreclosure of, a Mortgage described above, the foreclosure-purchaser or deed-in-lieu-grantee shall take title free of the lien for unpaid assessments for all said charges that have accrued up to the time of the foreclosure or deed given in lieu of foreclosure, but subject to the lien hereof for all said charges that shall accrue subsequent to the foreclosure or deed-in-lieu-of-foreclosure.

ARTICLE 4
EASEMENT FOR MAINTENANCE, ACCESS, PARKING, UTILITIES, AND CIRCULATION

Section 4.1. Easements for Maintenance, Access and Parking.

(a) Easement for Bus Circulation ISU hereby agrees to maintain the Common Area on the ISU Property so as to not interfere or obstruct the circulation and flow of the School District's buses and busing route and use of the Common Area by the School District's buses

(b) Easement for Signage. The School District hereby grants and conveys to ISU a perpetual non-exclusive easement for the right to construct Signs, which are approved in writing by the School District, at the locations as approved in writing by the School District

(c) Easement for Maintenance and Repair. Each Owner grants to the other Owner perpetual nonexclusive easements over the Common Areas and the Parcels as necessary to maintain and repair the Common Areas and to perform all tasks in accordance with the provisions of this Agreement.

(d) Easement for Parking ISU and the School District hereby grant and convey to the other a perpetual, non-exclusive easement to use all parking areas presently existing or which may exist in the future on the Property No Owner may reduce the number of parking stalls on its Parcel if such reduction would impair or affect the use of the other Parcel. Any parking immediately adjacent to an Owner's primary entrance into the Building on that Owner's Parcel shall be primarily for the use of that Owner. The Owners Committee will review parking needs of the Owners, and will agree upon parking rules, as necessary, including but not limited to, reserved and/or priority parking for the respective Owners during specified hours and use of the parking lot during special events.

(e) Walkways and Driveways. There shall be no obstruction of any streets, entranceways, walkways or driveways located within the Property which would interfere with the free circulation of foot, bicycle, automobile or truck traffic, except such obstruction as may be reasonably required in connection with repairs of such streets, walkways or driveways. Free use of the entranceways, walkways and driveways and free circulation of foot, bicycle and vehicular traffic are essential elements of the Property.

Section 4.2. Utilities and HVAC System. Except for the cost associated with maintaining the lighting in the parking lot, all utilities must be separately metered to each Parcel. Each Parcel shall own, maintain and repair its own HVAC units and systems.

Section 4.3. Rights of Entry. Each Owner shall have a limited right of entry in and upon the exterior of all Improvements located on any Parcel for the purpose of inspecting the same and taking whatever corrective action may be deemed necessary or proper, as may be authorized by the provisions of this Agreement However, nothing herein shall be construed to impose any obligation upon an Owner to maintain or repair any portion of a Parcel or any Improvement thereon which is to be maintained or repaired by the other Owner. Nothing in this Article shall in any manner limit the right of any Owner to the occupancy and control over the interior of the portion of the Building located upon its Parcel. However, each Owner shall permit access to such Owner's Parcel or Improvements thereon by the other Owner as reasonably necessary, such as in case of any emergency originating on or threatening such Parcel or Improvements, whether or not such Owner is present

Section 4.4. Parking Lot Lighting. The Owner of the School District Property shall maintain the lighting in the parking lot. Such lighting shall remain on during the hours that the Owner of the School District Property deems necessary. The cost of the maintaining, repairing and replacing the parking lot lighting shall be a Common Area Expense and shall be a Common Expense

Section 4.5. Individual Maintenance Obligations. Each Owner is responsible for all Service Facilities on its Parcel and shall insure that all outdoor refuse collection areas shall be visually screened so as not to be Visible from the Street and no refuse collection area shall be permitted between a street and the front of each Owner's portion of the Building

Section 4.6. Security. Each Owner shall be responsible to provide any, if at all, security for its Parcel. Providing security shall not be the responsibility of the Owner of the School District Property and shall not be a Common Expense.

ARTICLE 5
SHARED USE OF THE FACILITIES

The parties hereby agree that the Owners have an interest in sharing the use of the Building. Except as specifically set forth herein or in the Master Declaration Agreement recorded against the Property, an Owner shall be allowed to use the other Owner's portion of the Building by obtaining written approval of the other Owner as to the dates and times of the use and the type of use. The Owner using the other Owner's portion of the Building shall pay to such other Owner the amounts as agreed to in writing by the Owners.

ARTICLE 6
INSURANCE, DAMAGE OR LOSS TO THE PROPERTY AND CONDEMNATION

Section 6.1. Insurance. The School District shall be responsible for maintaining the necessary commercial general liability and casualty insurance for the Property. The limits of liability of all such insurance shall be a combined single limit (covering personal injury, bodily injury and property damage) of $1,000,000 per occurrence. The School District shall provide ISU with a certificate evidencing such insurance. ISU shall reimburse the School District for its pro-rata share of the premium and deductibles related to the insurance, within fifteen (15) days of the School District providing a receipt for such insurance to ISU. Such pro-rata share shall be based on the same proportionate share as the Common Area Assessment. In the event the premium for such insurance is increased due to a claim(s) against an Owner, such Owner shall be solely responsible for the increase in the premium due to the claim(s). Each Owner shall be responsible for maintaining any and all insurance for its personal property.

Section 6.2. Restoration of Common Areas. Except as otherwise provided in this Agreement, in the event of any destruction of any portion of the Common Areas other than any portion of the Building, it shall be the duty of the School District Property Owner to restore and repair the same to its former condition, as promptly as practical. The proceeds of any insurance shall be used for such purpose. The Common Areas and all other Improvements located within the Common Areas shall be reconstructed or rebuilt substantially in accordance with the original construction plans if they are available, with such changes as are approved by the Owners. In the event that the amount available from the proceeds of such insurance policies for such restoration and repair shall be less than the estimated cost of restoration and repair, a Reconstruction Assessment shall be levied by the School District Property Owner upon the Owners and their Parcels in order to provide the necessary funds for such reconstruction over and above the amount of any insurance proceeds available for such purpose. Reconstruction Assessments shall be borne by the Owners in the same proportions as Common Assessments

Section 6.3. Restoration Obligations of Owners. In the event of the damage or destruction of any portion of a Parcel or the portion of the Building thereon, then it shall be the duty of the Owner of such Parcel, as soon as may be practical, to repair and replace the damage or destruction, or such portion thereof as will render such damage or destruction indiscernible from the exterior of the Parcel

Section 6.4. Condemnation. In the event the whole, or any part, of the Common Areas shall be taken or condemned by any authority exercising the power of eminent domain, the Owners shall appear and defend such proceedings; provided, that if a Parcel is encumbered by a Mortgage or Mortgages which has or have a provision relating to condemnation, then in lieu of distributing the award to the Owner of said Parcel, that Owner's portion of the award shall be paid to the Mortgagee of the Mortgage with the highest priority and seniority for distribution and payment in accordance with the terms and conditions of said Mortgagee's Mortgage.

ARTICLE 7
FUTURE IMPROVEMENTS

Section 7.1. Future Additions to the Building. In the Event an Owner desires to increase the square footage of the Building owned by it, it must provide written notice to the other Owner of such addition thirty (30) days prior to the commencement of such construction. In the event such additions are likely to materially affect, reduce, or impede the use of the Common Areas, the Owner proposing to construct the additional square footage will first obtain the review and approval of the Owners Committee, and such approval will not be unreasonably withheld. All construction must be completed as quickly as possible and must comply with all applicable local, state and federal regulations, rules and ordinances and laws, including but not limited to parking requirements. All staging must be on the Owner's own Parcel and must not inhibit access to the Property and must not unreasonably interfere with the other Owner's use of the Common Area. Any improvements or remodeling to the Building which requires additions, changes or improvements to the Common Area of the Fire Safety System shall be the sole responsibility and cost of the Owner making such additions or improvements. Any and all remodeling, additions or changes made to the Building by an Owner shall comply with all applicable laws, rules and regulations

Section 7.2. Building Improvements.

(a) The Building may not be changed in anyway (including, without limitation, signs and color) without first providing prior written notice to the Owners as to the exterior elevations (including, without limitation, signs and color) of modification. All modifications to the Building must comply with all applicable rules, laws, regulations and ordinances.

Section 7.3. Construction Requirements.

(a) All work performed in the construction, maintenance, repair, replacement, alteration or expansion of the Building or Common Area improvements located on the Property shall be effected as expeditiously as possible and in such a manner as not to unreasonably interfere, obstruct or delay (i) access to or from the Building, or any part thereof, to or from any public right-of-way, (ii) vehicular parking in that portion of the improved Common Area located in from of the Building, or (iii) the busing route or delivery of receiving of merchandise by any business on the Property including, without limitation, access to Building All staging for the construction, maintenance, repair, replacement, alteration or expansion of the Building or Common Area improvements located on the Property including, without limitation, the location of any temporary buildings or construction sheds, the storage of building materials, and the parking of construction vehicles and equipment shall be limited to that portion of the Property approved in writing by the Owners. Unless otherwise specifically state herein, the person contracting for the performance of such work ("Contracting Party") shall, at its sole cost and expense, promptly repair and restore or cause to be promptly repaired and restored to its prior condition all buildings, improvements, signs, utility lines and Common Area damaged or destroyed in the performance of such work. Any improvements or remodeling to the Building which requires additions, changes or improvements to the Common Area of the Fire Safety System shall be the sole responsibility and cost of the Owner making such additions or improvements.

(b). The Contracting Party shall not permit any liens to stand against any Parcel for any work done or materials furnished in connection with the performance of the work described in subparagraph (a) above; provided, however, that the Contracting Party shall, within thirty (30) days after receipt of written notice from the Owner or Occupant of any Parcel encumbered by any such lien or claim of lien, cause any such outstanding lien or claim of lien to be released of record or transferred to bond in accordance with applicable law, failing which the Owner or Occupant of said Parcel shall have the right, at the Contracting Party's expense, to transfer said lien to bond.

(c) The parties acknowledge and agree that incidental encroachments upon the Common Area may occur as a result of the use of ladders, scaffolds and similar facilities in connection with the construction, maintenance, repair, replacement, alteration or expansion of the Building, improvements and Common Area located on the Property, all of which are permitted hereunder so long as all activities requiring the use of such facilities are expeditiously pursued to completion and are performed in such a manner as to minimize any interference with the use of the improved Common Area or with the normal operation of any Business in the Building.

ARTICLE 8
DURATION AND AMENDMENT

Section 8.1. Duration. This Agreement shall continue in full force until December 31, 2057, and thereafter in ten (10) year intervals unless a Termination of Joint Operations and Maintenance is recorded meeting the requirements of an amendment to this Agreement as set forth in Section 8.2 Notwithstanding any termination of this Agreement, in no event shall the easements granted in Section 4 be terminated, but shall remain in full force and effect.

Section 8.2. Amendment. Notice of the subject matter of a proposed amendment to this Agreement in reasonably detailed form shall be included in the notice of any meeting of the Owners at which a proposed amendment is to be considered. The amendment shall be adopted by the vote, in person or by proxy, or written consent of all Owners.

Section 8.3. Governmental Regulation All valid governmental enactments, ordinances and regulations are deemed to be part of this Agreement and to the extent that they conflict with any provision, covenant, condition or restriction hereof, said conflicting governmental enactment, ordinance and regulation shall control and the provision, covenant, condition or restriction hereof in conflict therewith shall be deemed (i) amended to the extent necessary to bring it into conformity with said enactment, ordinance and regulation while still preserving the intent and spirit of the provision, covenant, condition or restriction or (ii) stricken herefrom should no amendment conforming to the governmental enactment, ordinance or restriction be capable of preserving the intent and spirit of said provision, covenant, condition or restriction.

ARTICLE 9
GENERAL PROVISIONS

Section 9.1. Waiver of Use No Owner may exempt himself from personal liability for assessments duly levied under this Agreement, nor release its Parcel from the liens and charges hereof, by waiver of the use and enjoyment of the Common Areas or by abandonment of its Parcel.

Section 9.2. Leasing of Property. Every lease or other agreement for the hire or occupation ("lease") of any portion of the Property which is executed after the recording of this Agreement shall be subject to the provisions of this Agreement, and every Occupant of a Parcel or a portion thereof shall in all applicable respects comply with the provisions of this Agreement. Every Owner shall:

(a) Include in any agreement for the lease of all or any portion of its Parcel a specific provision that said lease is subject to this Agreement, that the Occupant of the Parcel will comply with the provisions of this Agreement, and that such provisions are an integral part of the lease; and

Not execute a lease to any portion of the Property without complying with the provisions of Section 9.2(a) above; provided, however, that an Owner's failure to do so shall not diminish the effect of this Agreement with respect to any such lease. The lease shall not become effective until an Occupant has executed a lease containing the provision required in Section 9.2(a) above.

Section 9.3. Legal Proceedings. Failure to comply with any of the terms of this Agreement by an Owner or Occupant, his guests, employees, invitees or tenants, shall be grounds for relief which may include, without limitation, an action to recover sums due for damages, injunctive relief, foreclosure of lien, or any combination thereof, which relief may be sought by an aggrieved Owner. Failure to enforce any provision hereof shall not constitute a waiver of the right to enforce said provision, or any other provision hereof Any Owner (not at the time in default hereunder) shall be entitled to bring an action for damages against any defaulting Owner and, in addition, may enjoin any violation of this Agreement. Any judgment rendered in any action or proceeding pursuant thereto shall include a sum for attorneys' fees, including appeals, in such amount as the Court may deem reasonable, in favor of the prevailing party, as well as the amount of any delinquent payment, together with interest, costs of collection and court costs. Each remedy provided for in this Agreement shall be cumulative and not exclusive or exhaustive.

Section 9.4. Severability. The provisions hereof shall be deemed independent and severable, and a determination of invalidity or partial invalidity or enforceability of any one provision or portion hereof by a court of competent jurisdiction shall not affect the validity or enforceability of any other provisions hereof

Section 9.5. Interpretation The provisions of this Agreement shall be liberally construed to effectuate its purpose of creating a uniform plan for the operation of the Property and for the maintenance of the Common Areas, and any violation of this Agreement shall be deemed to be a nuisance The article and section headings, titles and captions have been inserted for convenience only, and shall not be considered or referred to in resolving questions of interpretation or construction. Unless the context otherwise requires, as used herein the singular and the plural shall each include the other and the masculine, feminine or neuter shall each include the masculine, feminine and neuter

Section 9.6. Hold Harmless and Indemnification; Insurance To the extent permitted by the Idaho Tort Claims Act, Idaho Code § 6-901 et seq., each Owner shall indemnify, defend, protect and hold each other harmless from and against any and all claims of liability for any injury or damage to any person or property arising from School District's or School District's agents and representatives or ISU's or ISU's agents and representatives use of the Building and Property, or from any activity, work or thing done, permitted or suffered by, in or about the Property and Building. The School District and ISU shall further indemnify, defend, protect and hold each other harmless from and against any and all claims arising from any negligent or intentional act or omission by each's respective agents, contractors or employees, and from and against all costs, attorney's fees, expenses and liabilities incurred in the defense of any such action or proceeding brought thereon. In the event any action or proceeding is brought against the School District or ISU, by reason of any such claim, the entity from whose conduct the claim arose shall, upon notice from the School District or ISU, defend it or them at that entity's expense by counsel satisfactory to the entity to whom indemnification is owed

Section 9.7. Limitation on Liability and Remedies. The School District and ISU, as a material part of the consideration to each other and in recognition of the cooperative relationship of the parties and their desire to provide for continued public use and enjoyment of the Property, do hereby agree to the following limitations on each other's liability arising from and as well as the use of the Building and the Property. To the fullest extent permitted by law, both the School District and ISU, on each other's behalf and on behalf of all persons or entities claiming by and through either, agree to limit the liability of the School District and ISU for any claims, losses, costs, damages of any nature whatsoever or claims or expenses from any cause or causes, so that the total aggregate liability of a claim against either the School District or ISU shall not exceed the amount of collectible liability insurance that the School District and ISU are separately required to maintain hereunder be liable to the other Owner for any injury to any person or damage to the Common Areas or any equipment thereon which may be sustained by reason of the negligence of said Owner or of his guests, employees, invitees or tenants, to the extent that any such damage shall not be covered by insurance. The costs incurred by the other Owner as a result of such damage shall be deemed a Special Assessment of such Owner and its Parcel, and shall be subject to levy, enforcement and collection by the other Owner in accordance with the assessment lien procedure provided in this Agreement.

Section 9.8. No Public Right or Dedication. Nothing contained in this Agreement shall be deemed to be a gift or dedication of all or any part of the Property to the public, or for any public use.

Section 9.9. Nonliability. No Person shall be liable to any party for injuries or damage resulting from such Person's acts or omissions within what such Person reasonably believed to be the scope of his duties under this Agreement ("Official Acts"), except to the extent that such injuries or damages result from such Person's malicious or criminal misconduct.

Section 9.10. Notices. Except as otherwise provided in this Agreement, in each instance in which notice is to be given to an Owner, the same shall be in writing and may be delivered personally to the Owner, in which case personal delivery of such notice to one or more co-owners of a Parcel or to any general partner of a partnership owning a Parcel shall be deemed delivery to all co-owners or to the partnership, as the case may be. Personal delivery of such notice to any officer or agent for the service of process on a corporation or limited liability company shall be deemed delivery to the corporation or limited liability company, as the case may be. In lieu of the foregoing, such notice may be delivered by certified or registered United States mail, postage prepaid, return receipt required, addressed to the Owner at the most recent address furnished by such Owner to the other Owner or, if no such address shall have been furnished, to the street address of such Parcel. Such notice shall be deemed delivered forty-eight (48) hours after the time of such mailing.

THIS Agreement has been executed on the date first written above and may be executed in any number of original counterparts, each of which shall be deemed an original, but all of which when taken together shall constitute one and the same instrument The signature and notary acknowledgement pages of any counterpart may be detached therefrom without impairing the legal effect of the signature(s) thereon provided such signature and notary pages are attached to any other counterpart identical thereto except having additional signature and notary pages executed by other parties to this Agreement attached thereto

BOARD OF TRUSTEES AND STATE BOARD OF EDUCATION OF IDAHO STATE UNIVERSITY

By: James A. Fletcher

Name: James A. Fletcher

Title: Vice President for Finance & Administration
Financial Services Idaho State University

52423\01000\289733 V02 DNL

04636 0064 904889 7

STATE OF IDAHO)
) ss.
County of Bannock)

On this 29th day of November, 2007, before me, Dorothy Ruth, a Notary Public in and for said State, personally appeared James A. Fletcher, known or identified to me to be the Vice President for FINANCIAL SERVICES IDAHO STATE UNIVERSITY, the entity that executed the within instrument or the person who executed the instrument on behalf of such entity and on behalf of the BOARD OF TRUSTEES AND STATE BOARD OF EDUCATION OF IDAHO STATE UNIVERSITY, and acknowledged to me that such entity executed the same.

IN WITNESS WHEREOF, I have hereunto set my hand and affixed my official seal the day and year in this certificate first above written

DOROTHY RUTH
NOTARY
PUBLIC
STATE OF IDAHO

Dorothy Ruth
Notary Public for Idaho
Residing at Pocatello, Idaho
My commission expires 11/06/2008

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04636 0064 904889 7

COUNTERPART SIGNATURE PAGE TO
JOINT OPERATIONS AND MAINTENANCE AGREEMENT

JOINT SCHOOL DISTRICT NO. 2, ADA
AND CANYON COUNTIES, IDAHO

By:

Name: Linda Clark

Title: Superintendent

STATE OF IDAHO)
) ss
County of Ada)

On this 29th day of November, 2007, before me, Patricia A. Duncan, a Notary Public in and for said State, personally appeared Linda Clark, known or identified to me to be the Superintendent of JOINT SCHOOL DISTRICT NO. 2, ADA AND CANYON COUNTIES, IDAHO, the entity that executed the within instrument or the person who executed the instrument on behalf of said entity, and acknowledged to me that such entity executed the same.

IN WITNESS WHEREOF, I have hereunto set my hand and affixed my official seal the day and year in this certificate first above written

PATRICIA A. DUNCAN
NOTARY PUBLIC
STATE OF IDAHO

Patricia A. Duncan
Notary Public for Idaho
Residing at Meridian, Idaho
My commission expires 3-27-09

04636 0064 904869 7

EXHIBIT "A"

LEGAL DESCRIPTION OF SCHOOL DISTRICT PROPERTY

PARCEL DESCRIPTION April 12, 2007

Project: Jabil Property -- Hummel Architects

Parcel Type: Remainder - A Portion of Parcel "A" of ROS No. 6631 and that portion of Locust Grove Rd. R/W West of the Section line.

A parcel of land being a portion of Parcel "A" of Record of Survey No. 6631, situated in the SE 1/4 of Section 18, Township 3 North, Range 1 East, Boise Meridian, City of Meridian, Ada County, Idaho, more particularly described as follows:

COMMENCING at a found 3" brass cap, Corner Record Instrument No. 103176248, marking the Southeast corner of said Section 18;

Thence North 00°30'34" East, coincident with the east line of said Section 18, also being the centerline of Locust Grove Rd., a distance of 1281.66 feet to the intersection of said east line (centerline of Locust Grove Rd.) and the northerly right-of-way of Interstate Highway 84 and the POINT OF BEGINNING;

Thence North 89°33'08" West, coincident with said northerly right-of-way line, a distance of 330.29 feet;

Thence North 00°00'00" East, a distance of 442.71 feet;

Thence North 90°00'00" West, a distance of 354.53 feet;

Thence South 00°00'00" East, a distance of 10.00 feet;

Thence North 90°00'00" West, coincident with the centerline of an existing wall within the Jabil Circuit building extended, a distance of 105.95 feet to the centerline intersection of an existing wall within the Jabil Circuit building;

Thence North 00°00'00" East, coincident with the centerline of an existing wall within the Jabil Circuit building, a distance of 70.23 feet to the centerline intersection of an existing wall within the Jabil Circuit building;

Thence North 90°00'00" West, coincident with the centerline of an existing wall within the Jabil Circuit building, a distance of 401.42 feet to the centerline intersection of an existing wall within the Jabil Circuit building;

Thence South 00°00'00" East, coincident with the centerline of an existing wall within the Jabil Circuit building, a distance of 203.23 feet to the centerline intersection of an existing wall within the Jabil Circuit building;

Thence North 90°00'00" West, coincident with the centerline of an existing wall within the Jabil Circuit building, a distance of 10.00 feet to the centerline intersection of an existing wall within the Jabil Circuit building;

Thence North 00°00'00" East, coincident with the centerline of an existing wall within the Jabil Circuit building, a distance of 14.26 feet to the centerline intersection of an existing wall within the Jabil Circuit building;

Thence North 90°00'00" West, coincident with the centerline of an existing wall within the Jabil Circuit building extended, a distance of 161.99 feet;

Thence South 00°00'32" West, a distance of 326.77 feet to the northerly right-of-line of Interstate Highway 84;

Thence North 89°33'30" West, coincident with said northerly right-of-way line, a distance of 401.46

Thence North 28°26'58" West, a distance of 49 59 feet;

Thence South 89°37'32" West, along the northerly line of the SE 1/4 SW 1/4 of Section 18, a distance of 64.81 feet to the southwest corner of said Parcel "A" of said Record of Survey No. 6631;

Thence leaving said right-of-way and along the westerly line of said Parcel "A" the following four courses:

Thence North 00°00'40" West, a distance of 128.95 feet;

Thence North 89°58'05" East, a distance of 94.70 feet;

Thence North 56°08'43" East, a distance of 40.08 feet;

Thence North 00°00'39" West, a distance of 764.91 feet to a point on the southerly right-of-way of East Central Drive;

Thence along said southerly right-of-way the following five courses:

Thence North 89°38'50" East, a distance of 860.51 feet to a point of curvature;

Thence 37.04 feet along a tangent curve the right, having a radius of 148.00 feet, a central angle of 14°20'17", and subtended by a chord bearing South 83°11'01" East a distance of 36.94 feet to a point of tangency;

Thence South 76°00'53" East, a distance of 355 52 feet to a point of curvature;

Thence 14 87 feet along a tangent curve the left, having a radius of 212 00 feet, a central angle of 04°01'09", and subtended by a chord bearing South 78°01'27" East a distance of 14.87 feet to a point of non-tangent compound curvature;

Thence 69.25 feet along a curve the left, having a radius of 332.00 feet, a central angle of 11°57'05", and subtended by a chord bearing South 84°01'48" East a distance of 69.13 feet to a point at the centerline of the Hunter Lateral;

Thence, coincident with the centerline of the Hunter Lateral the following four courses:

Thence South 23°43'57" East, a distance of 100.52 feet;

Thence South 32°25'35" East, a distance of 227.53 feet;

Thence South 35°12'46" East, a distance of 277.92 feet;

Thence South 41°34'55" East, a distance of 121.13 feet to a point on said east line of Section 18 and the centerline of said Locust Grove Rd.;

Thence, South 00°30'34" West, coincident with said east line of said Section 18, also being the centerline of Locust Grove Rd., a distance of 255.28 feet to the POINT OF BEGINNING.

The parcel above described contains 23.300 acres, more or less.

Together with and subject to covenants, easements, and restrictions of record.

PROFESSIONAL LAND SURVEYOR REGISTERED 10729 STATE OF IDAHO TRAVIS P. FOSTER

Travis P. Foster, P.L.S. 4/12/07 License No. 10729

End of Description

EXHIBIT "B"

LEGAL DESCRIPTION OF THE ISU PROPERTY

52423\01000\289733 V02 DNL

04636 0064 904889 7

Lot 2 in Block 1 of Joint No. 2 Subdivision Phase 1, according to the official plat thereof, filed in Book 99 of Plats at Page(s) 12828, through 12830, records of Ada County, Idaho.

PARCEL DESCRIPTION April 12, 2007

Project: Jabil Property – Hummel Architects

Parcel Type: Remainder - A Portion of Parcel "A" of ROS No. 6631 and that portion of Locust Grove Rd. R/W West of the Section line.

A parcel of land being a portion of Parcel "A" of Record of Survey No. 6631, situated in the SE 1/4 of Section 18, Township 3 North, Range 1 East, Boise Meridian, City of Meridian, Ada County, Idaho, more particularly described as follows:

COMMENCING at a found 3" brass cap, Corner Record Instrument No. 103176248, marking the Southeast corner of said Section 18;

Thence North 00°30'34" East, coincident with the east line of said Section 18, also being the centerline of Locust Grove Rd., a distance of 1281.66 feet to the intersection of said east line (centerline of Locust Grove Rd.) and the northerly right-of-way of Interstate Highway 84 and the POINT OF BEGINNING;

Thence North 89°33'08" West, coincident with said northerly right-of-way line, a distance of 330.29 feet;

Thence North 00°00'00" East, a distance of 442.71 feet;

Thence North 90°00'00" West, a distance of 354.53 feet;

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Thence North 00°00'00" East, coincident with the centerline of an existing wall within the Jabil Circuit building, a distance of 14.26 feet to the centerline intersection of an existing wall within the Jabil Circuit building;

Thence North 90°00'00" West, coincident with the centerline of an existing wall within the Jabil Circuit building extended, a distance of 161.99 feet;

Thence South 00°00'32" West, a distance of 326.77 feet to the northerly right-of-line of Interstate Highway 84;

Thence North 89°33'30" West, coincident with said northerly right-of-way line, a distance of 401.46

Thence North 28°26'58" West, a distance of 49.59 feet;

Thence South 89°37'32" West, along the northerly line of the SE 1/4 SW 1/4 of Section 18, a distance of 64.81 feet to the southwest corner of said Parcel "A" of said Record of Survey No. 6631;

Thence leaving said right-of-way and along the westerly line of said Parcel "A" the following four courses:

Thence North 00°00'40" West, a distance of 128.95 feet;

Thence North 89°58'05" East, a distance of 94.70 feet;

Thence North 56°08'43" East, a distance of 40.08 feet;

Thence North 00°00'39" West, a distance of 764.91 feet to a point on the southerly right-of-way of East Central Drive;

Thence along said southerly right-of-way the following five courses:

Thence North 89°38'50" East, a distance of 860.51 feet to a point of curvature;

Thence 37.04 feet along a tangent curve the right, having a radius of 148.00 feet, a central angle of 14°20'17", and subtended by a chord bearing South 83°11'01" East a distance of 36.94 feet to a point of tangency;

Thence South 76°00'53" East, a distance of 355.52 feet to a point of curvature;

Thence 14.87 feet along a tangent curve the left, having a radius of 212.00 feet, a central angle of 04°01'09", and subtended by a chord bearing South 78°01'27" East a distance of 14.87 feet to a point of non-tangent compound curvature;

Thence 69.25 feet along a curve the left, having a radius of 332.00 feet, a central angle of 11°57'05", and subtended by a chord bearing South 84°01'48" East a distance of 69.13 feet to a point at the centerline of the Hunter Lateral;

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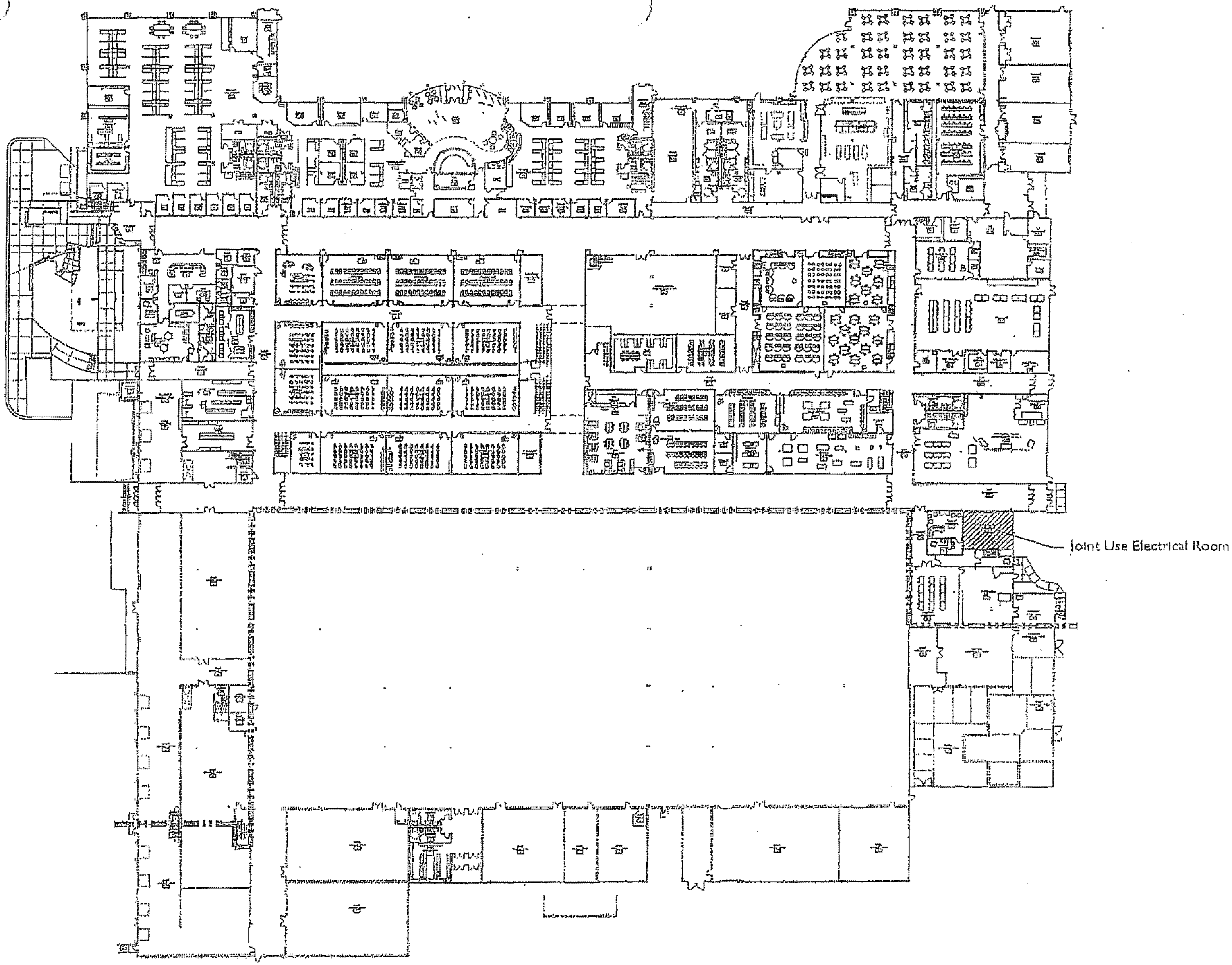
PROFESSIONAL LAND SURVEYOR REGISTERED 10729 STATE OF IDAHO TRAVIS P. FOSTER

Travis P. Foster, P.L.S. 4/12/07 License No. 10729

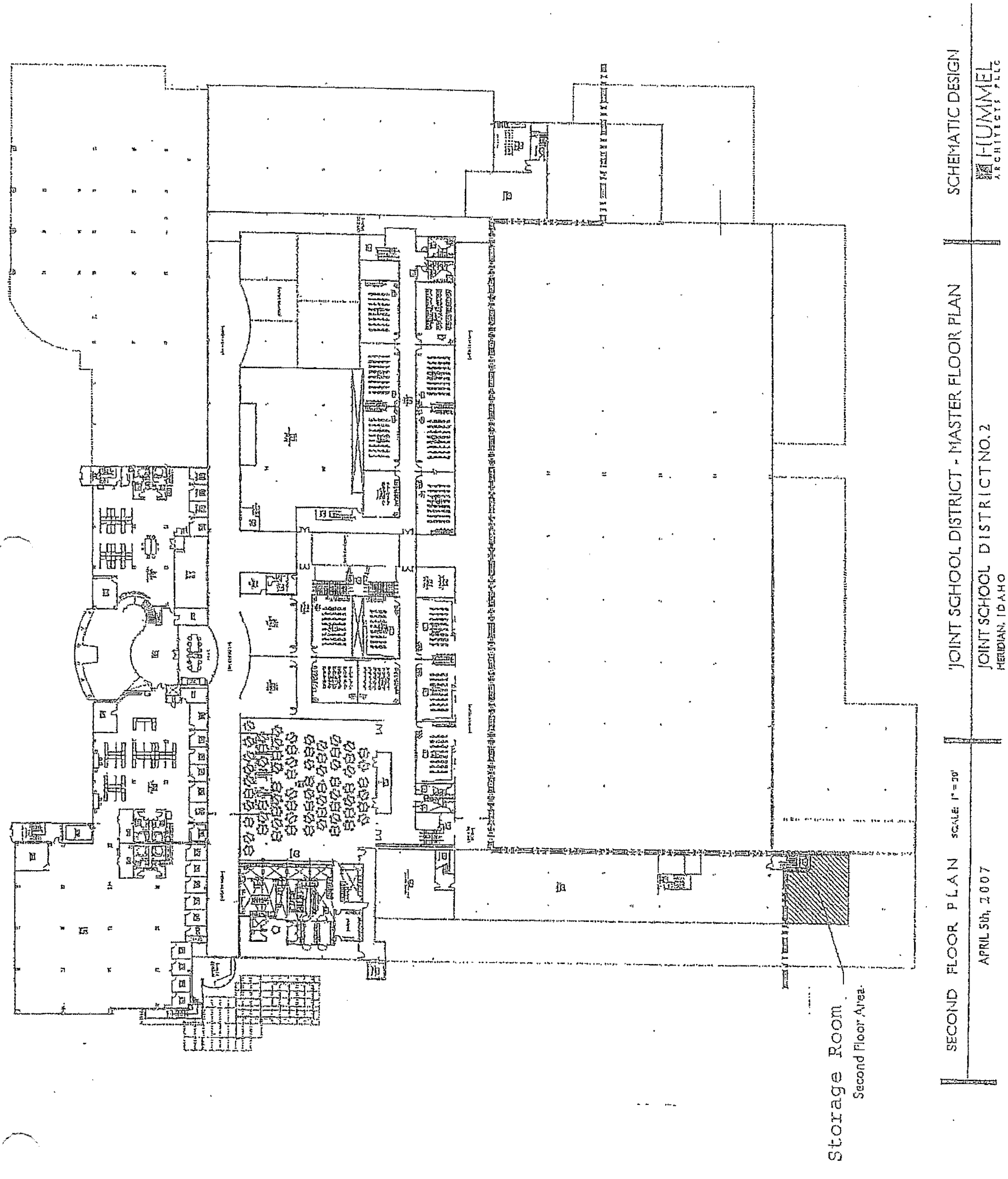
End of Description

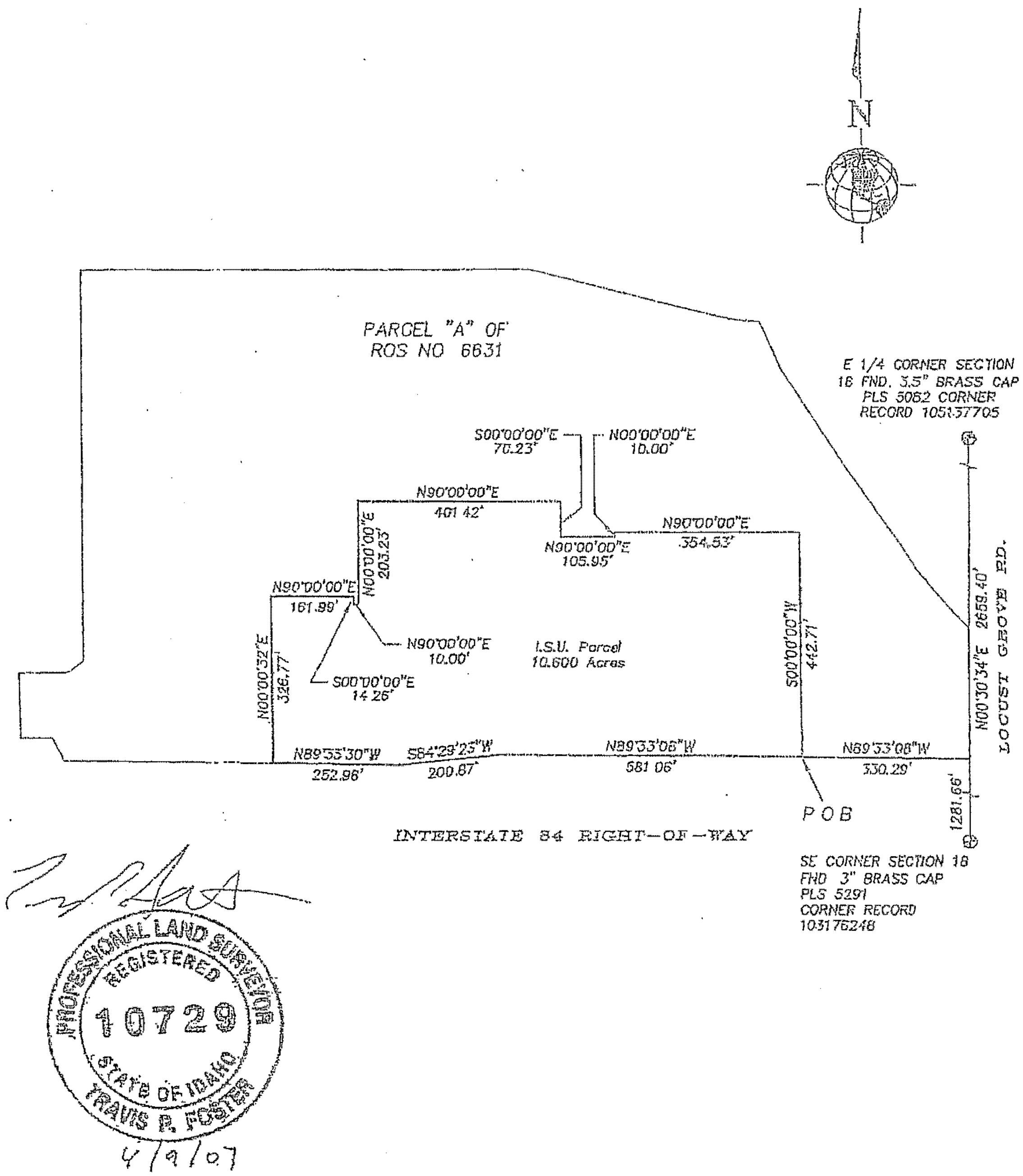
EXHIBIT "C"

ELECTRICAL AND STORAGE ROOMS



FIRST FLOOR PLAN SCALE: 1" = 30'	JOINT SCHOOL DISTRICT - MASTER FLOOR PLAN	SCHEMATIC DESIGN
APRIL 5th, 2007	JOINT SCHOOL DISTRICT NO. 2 MERIDIAN, IDAHO	HUMMEL ARCHITECTS PLLC


Storage Room
Second Floor Area.
SECOND FLOOR PLAN
APRIL 5th, 2007
JOINT SCHOOL DISTRICT - MASTER FLOOR PLAN
JOINT SCHOOL DISTRICT NO. 2
MERIDIAN, IDAHO
SCHEMATIC DESIGN
HUMMEL
ARCHITECTS PLLC



DRAWN BY: TRF	CHECKED BY:
LAST EDIT: 4/3/2007	APPROVED BY:
	PLOT DATE: 04/04/07

DATE	BY	REV#	REVISION	CK'D	APPR.

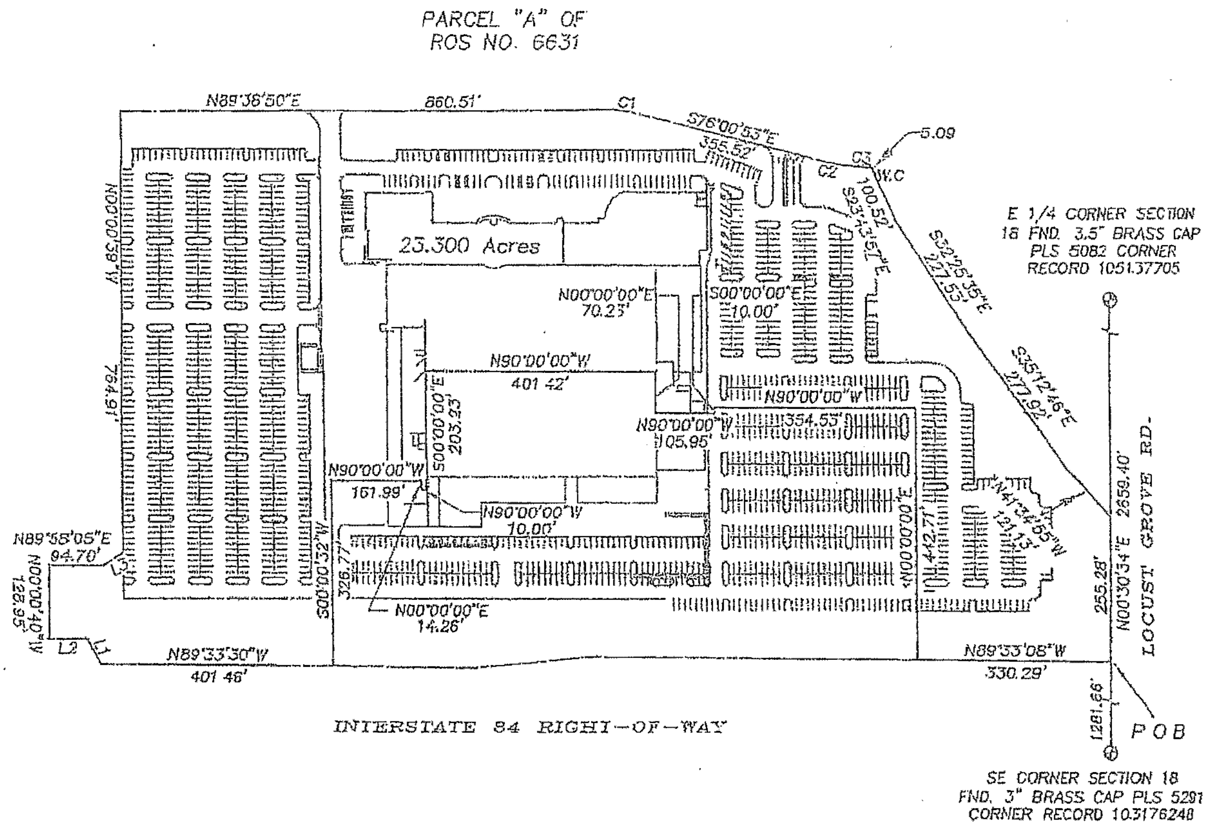
3130 S. Gwyhan St
Boise, Idaho
83705-4750

1st FLOOR - A PORTION OF PARCEL "A" OF ROS NO. 6631

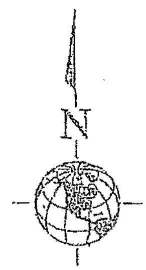
IN THE SE 1/4 OF SECTION 18, T3N, R1E, BM
ADA COUNTY, IDAHO

MERIDIAN IDAHO

SCALE:	PROJECT NO.	DRAWING FILE NAME:	SHEET
1"=300'	33417	33417-SURV-EXHIBITS	1 of 1



CURVE TABLE					
CURVE	DELTA	RADIUS	ARC	CHORD BEARING	CHORD
C1	14°20'17"	148.00	37.04	N83°11'01"W	36.94
C2	4°01'09"	212.00	14.87	S78°01'27"E	14.87
C3	11°57'05"	332.00	69.25	S84°01'48"E	69.13



LINE TABLE		
LINE	BEARING	LENGTH
L1	N28°26'58"W	49.59
L2	S89°37'32"W	64.81
L3	N55°08'43"E	40.08

PROFESSIONAL LAND SURVEYOR
REGISTERED
10729
STATE OF IDAHO
TRAVIS P. FOSTER
4/12/07

DRAWN BY: TFF	CHECKED BY:		
LAST EDIT: 4/12/2007	APPROVED BY:		
	PLOT DATE: 04/12/07		
DATE	BY	REV#	REVISION	CK'D/APPR

WAI PACIFIC
5130 S. Overland ..., Boise, Idaho 83705-4765

REMAINDER - A PORTION OF PARCEL "A" OF ROS NO. 6631

IN THE SE 1/4 OF SECTION 18, T3N, R1E, BM
ADA COUNTY, IDAHO

MERIDIAN IDAHO

SCALE:	PROJECT NO.	DRAWING FILE NAME:	SHEET
1"=300'	33417	33417-SURV-EXHIBITS	1 / 1

EXHIBIT D

Leased Premises

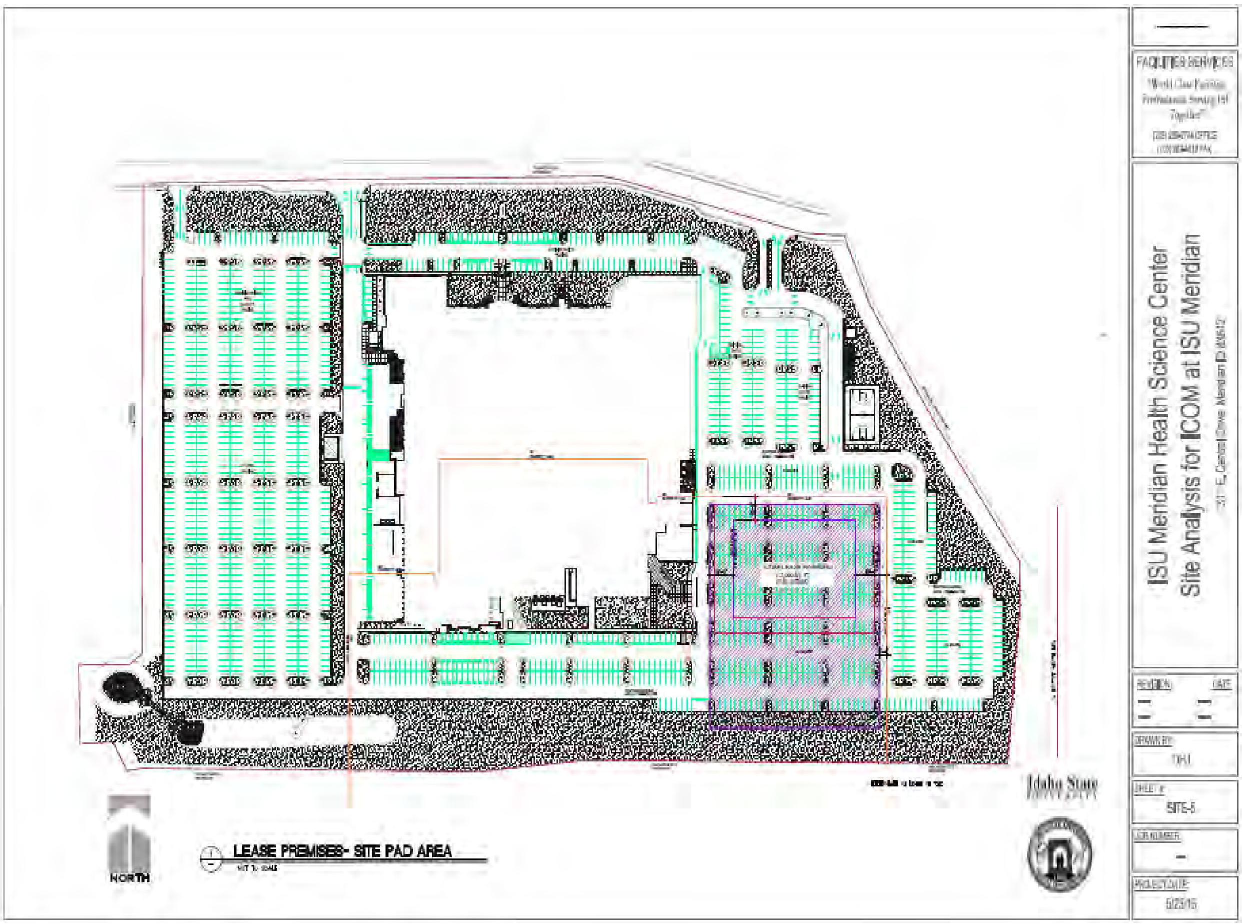


EXHIBIT E

COMA Accreditation Standards and Procedures

(attached)

COMMISSION ON OSTEOPATHIC COLLEGE ACCREDITATION

ACCREDITATION OF COLLEGES OF OSTEOPATHIC MEDICINE:
COM Accreditation Standards and Procedures

(Effective: July 1, 2016)

AMERICAN OSTEOPATHIC ASSOCIATION
142 E. Ontario Street • Chicago, IL 60611-2864 • 800-621-1773 • 312/202-8000 • Fax 312/202-8209

TABLE OF CONTENTS

ACCREDITATION OF COLLEGES OF OSTEOPATHIC MEDICINE:
COM ACCREDITATION STANDARDS AND PROCEDURES

NEW AND REVISED STANDARDS AND PROCEDURES

Words that appear in blue throughout the Standards are defined in the Glossary. The changes made in the Standards are highlighted in yellow throughout. Previous standards are renumbered accordingly to accommodate the addition of the new standards.

At the April 16 – 17, 2016 meeting of the COCA, the Standards Review Committee presented changes to the *Accreditation of Colleges of Osteopathic Medicine: COM Accreditation Standards and Procedures* in the following Domains which were approved and become effective on **July 1, 2016**:

- Standard One: Mission, Goals, and Objectives
- Standard Two: Governance, Administration, and Finance
- Standard Three: Facilities, Equipment, and Resources
- Standard Four: Faculty
- Standard Five: Students
- Standard Six: Curriculum
- Standard Eight: GME Outcomes
- Chapter II: Applicant and Accreditation Procedures
- Chapter III: The Self Study Process
- Chapter VI: USDE Requirements

ACCREDITATION OF COLLEGES OF OSTEOPATHIC MEDICINE: COM ACCREDITATION STANDARDS AND PROCEDURES

INTRODUCTION TO COM ACCREDITATION AND THE COMMISSION ON OSTEOPATHIC COLLEGE ACCREDITATION

Role of Accreditation

The American Osteopathic Association Commission on Osteopathic College Accreditation (COCA) is the only accrediting agency for predoctoral osteopathic medical education, and is recognized by the United States Department of Education (USDE).

Accreditation action taken by the COCA means a college or school of osteopathic medicine (COM) has appropriately identified its mission, has secured the resources necessary to accomplish that mission, shows evidence of accomplishing its mission, and demonstrates that it may be expected to continue to accomplish its mission in the future. Accreditation of a COM means that the COM incorporates the science of medicine, the principles and practices of osteopathic manipulative medicine, the art of caring and the power of touch within a curriculum that recognizes the interrelationship of structure and function for diagnostic and therapeutic purposes; recognizes the importance of addressing the body as a whole in disease and health; and recognizes the importance of homeostasis and self-regulation in the maintenance of health.

Accreditation signifies that a COM has met or exceeded the AOA standards for educational quality with respect to mission, goals, and objectives; governance, administration, and finance; facilities, equipment, and resources; faculty; student services; preclinical and clinical education; research and scholarly activity; and graduate medical education.

The process of accreditation is a cooperative activity calling for continuing self-assessment on the part of each COM, periodic peer evaluation through on-site visits and other reviews directed by the COCA.

A Brief History of AOA College Accreditation Activities

The history of the accreditation of colleges of osteopathic medicine shows that from the very start in the late nineteenth century the osteopathic profession has been interested and active in assisting colleges in the attainment and maintenance of high educational standards.

The American School of Osteopathy was established by Dr. Andrew Taylor Still, a registered physician and surgeon in the State of Missouri, in Kirksville, Missouri. The college's corporate charter (May 11, 1892) granted the right to confer the Doctor of Medicine (M.D.) degree. However, the **governing body** of the school chose to award the Doctor of Osteopathy (D.O.) degree.

A number of osteopathic colleges had been established by 1898. However, there was a lack of uniformity in the admission and graduation requirements of the various colleges. In these early years, osteopathic educators and leaders recognized the fact that the attainment and maintenance of high educational standards was essential. The American School of Osteopathy issued an invitation to all osteopathic colleges to attend a meeting in Kirksville, Missouri, June 28, 1898, to form an association of osteopathic colleges.

In 1897, the first Constitution of the American Association for the Advancement of Osteopathy (forerunner of the American Osteopathic Association) was adopted and among the several committees provided for was the Committee on Education. The 1901 Constitution of the American Osteopathic Association provided that the Committee on Education, together with the Executive Committee of the Associated Colleges of Osteopathy, should constitute a joint committee to:

a. Investigate schools applying for membership in the Associated Colleges of Osteopathy;
b. Make an annual investigation of schools who were already members; and
c. Make an annual report on these schools to the Board of Trustees of the American Osteopathic Association.

The Committee on Education was charged with the duty of reporting annually on the condition of each school. The Board and members of the Association were primarily interested in the following:

a. "Do the charter, equipment and work of a particular school correctly represent osteopathy?"
b. "What kind of person, both as to general character and professional qualifications, who just from school, has opened an office near me for the practice of the same profession?"

In 1901, the joint committee adopted the policy of appointing a member of the profession to serve as "college inspector," sometimes referred to as "censor". In 1902, the Bylaws of the American Osteopathic Association for the first time provided machinery for the inspection and approval of osteopathic colleges. The first college inspection was made in 1903, and on the basis of the report to the Board of Trustees, the members of the Associated Colleges of Osteopathy were approved. By 1915, it was agreed that expenses of college accreditation would be borne by the American Osteopathic Association.

In 1923, the AOA Department of Education was changed to "The Bureau of Professional Education," and two years later, "The Bureau of Colleges" was added. In 1928, the two bureaus were joined together, and in 1930, the Bureau of Professional Education and Colleges was established. In the following year the Board of Trustees approved a recommendation that the Chair of the Bureau of Professional Education and Colleges and the Chair of the Committee on College Inspection, a sub-committee of the Bureau, should be one and the same person.

In 1938, a policy was adopted to create official inspection committees of two or three members to inspect each osteopathic college at least once every two years. In 1949, a new policy of college inspection, known as the "Survey Committee," was adopted, which provided for a complete survey of each college to be performed by a survey team of from four to seven members at least every three years.

In 1952, the American Osteopathic Association was initially recognized by the United States Department of Education. In 1959 - 1960, after several years of study, a reorganization of the education structure of the American Osteopathic Association took place. In order to bring all facets of osteopathic education into one body, a new Bureau of Professional Education was organized.

The National Commission on Accrediting recognized the American Osteopathic Association in 1967. The National Commission on Accrediting was the predecessor to the Council on Postsecondary Accreditation. On January 1, 1994 the Council on Postsecondary Accreditation was reorganized as the Commission on Recognition of Postsecondary Accreditation. On January 1, 1997, the Commission on Recognition of Postsecondary Accreditation (CORPA) was reorganized as Council on Higher Education Accreditation (CHEA), which is the non-governmental agency recognized by higher education institutions to approve, and recognize national agencies for accreditation purposes.

In 1993, the Bureau renamed its committees and coordinated four councils that dealt with various phases of osteopathic education:

a. The Council on Predoctoral Education, the evaluating unit of undergraduate medical education;
b. The Council on Postdoctoral Training, the evaluating unit of internships, residencies, preceptorships and other post-graduate medical education programs;
c. The Council on Continuing Medical Education, the unit which evaluates programs and recommends approval of CME credits; and
d. The Council on International Osteopathic Medical Education and Affairs.

These councils were responsible for evaluating the programs under their purview and making initial recommendations to the AOA Bureau. The AOA Bureau served as the accrediting and final approval agency for colleges of osteopathic medicine. The Board of Trustees was the final appeal body for decisions of the Council on Postdoctoral Training, and was the final approving and appeal body for the Council on Continuing Medical Education.

In 2001, the Task Force to Study the Structure of the Department of Educational Affairs began to broadly review the structure of the Department of Educational Affairs, with an emphasis on the AOA Bureau. In February 2003, the Task Force presented its final report to the AOA Board of Trustees for approval. The result of this Task Force was to split the functions of the AOA Bureau into two separate decision making bodies.

The Bureau of Osteopathic Education (BOE) was responsible for postdoctoral education and continuing medical education and had five committees reporting to it. Of those five committees, three were new. The five committees were: 1) Council of Hospitals (new); Osteopathic Medical Educators Council (new); Council of Osteopathic Specialty Societies (new); Council on Postdoctoral Training; and Council on Continuing Medical Education. The BOE began its new functions in July 2004.

The college accreditation process was re-organized into the Commission on Osteopathic College Accreditation (COCA), a single purpose committee that functions as the final decision making body for college accreditation.

In February 2004, the AOA Board of Trustees voted to approve the recommended structure of the COCA, which included the elimination of the Council on Predoctoral Education. The COCA is now the sole accrediting body for colleges of osteopathic medicine that reviews, evaluates and establishes the accreditation status of a COM.

Mission, Goals and Objectives of the COCA

The COCA serves the public by establishing, maintaining, and applying accreditation standards and procedures to ensure that academic quality and continuous quality improvement delivered by the COMs reflect the evolving practice of osteopathic medicine. The scope of the COCA encompasses the accreditation of COMs.

Goals and Objectives

Goal 1

To serve the public and the community of interest by ensuring the continued effectiveness of the COCA.

Objectives:

1. Maintain an independent and objective accreditation process.
2. Inform the public and the communities of interest regarding the accreditation status of programs and institutions.
3. Develop and implement policies with integrity and high ethical standards.
4. Continue to seek the most cost effective way to provide the services of the COCA.
5. Develop and disseminate information that demonstrates the effectiveness of the COCA's operations.
6. Maintain liaison between the COCA and its constituents.
7. Keep the community of interest informed of current trends and developments in specialized accreditation.
8. Serve as a resource on accreditation.

Goal 2

To develop, maintain, apply, and periodically review the COCA's accreditation processes and the accreditation standards for COMs.

Objectives:

1. Review COMs programs and institutions and make accreditation decisions in accordance with COCA's standards and procedures and the COM's mission, goals and objectives.
2. Establish and disseminate standards, policies and procedures in the accreditation manual for the COMs accredited by the COCA.
3. Comprehensively review the accreditation standards at least every five years.
4. Solicit suggestions from accrediting teams relative to standards, procedures, and process.
5. Solicit suggestions from the community of interest relative to standards, procedures, and process.
6. Identify competent individuals and provide appropriate training so they can participate in accreditation on-site visits.
7. Evaluate the performance of all evaluators and use the results of the evaluations to identify areas needing emphasis in the training process.
8. Monitor programs in the interim between on-site visits through the use of annual reports, mid-cycle reports, progress reports, interim progress reviews, and focused visitations.

Goal 3

To foster continuous quality improvement of osteopathic medical education by encouraging innovation and creativity in COM's programs and institutions.

Objectives:

1. Communicate to the community of interest that the COCA encourages innovation and creativity in the COM.
2. Ensure that the policies and the procedures of the COCA do not inhibit innovation.
3. Ensure that the COCA and *Evaluators Registry* members perceive innovation as a necessary and positive approach to foster continuous quality improvement in osteopathic medical education.
4. Create standards which tie institutional planning to ongoing assessment of COM effectiveness.

Goal 4

To assure the continued effectiveness of the accreditation process by the development and application of continuous quality assurance, self-assessment, and external review of the COCA.

Objectives:

1. Maintain recognition by the USDE.
2. Seek external review by organizations that recognize accrediting bodies and follow accepted codes of good practice.
3. Engage in planning and conduct periodic self-assessments.
4. Evaluate and test the validity and reliability of the COCA's processes.
5. Maintain a committee structure that involves COCA members, and other experts in planning, quality improvement, and self-assessment.
6. Seek regular input from the community of interest relative to planning, quality improvement, and self-assessment.

CHAPTER I: COM ACCREDITATION STANDARDS

Introduction

This chapter defines the accreditation standards against which COMs are evaluated for accreditation by the COCA. The COCA and each accredited COM are required to adhere to the policies, procedures and standards contained in the official COCA document: *Accreditation of Colleges of Osteopathic Medicine: COM Accreditation Standards and Procedures.*

In conducting its accrediting activities, the COCA will evaluate the COM considering its stated mission, including respect for its religious mission where that exists, and will consistently apply and enforce its standards. This should not be construed as limiting COCA's ability to enhance its standards over time.

Standard One: Mission, Goals, and Objectives

1.1 The COM must have a clearly defined mission statement. Mission, vision, and goals statements may be used as one entity which collectivity addresses all issues mentioned in this standard. The mission, vision, and goals statement must include goals and objectives appropriate to osteopathic medical education that address teaching, research, service, including osteopathic clinical service, graduate medical education training, and student achievement.

Guideline*: The mission statement should be clear and concise, and provide in a concise format what the COM does. The mission statement should be communicated to faculty, staff, students and other communities of interest.* ***The*** *mission statement should be periodically reviewed and revised as necessary.*

1.1.1 All COMs having accreditation status must submit a "mid-cycle" report to the COCA on their success in meeting their mission. This report will be submitted with the Annual Supplemental Report in the fourth year after receipt of initial or continuing accreditation status.

1.2 Each COM must maintain in effect any charter, licenses or approvals required for it to function as a college of osteopathic medicine in the jurisdiction in which it operates.

1.3 The COM must connect its learning outcomes assessment to mission plans and objectives in order to continuously improve the educational quality of its osteopathic medical education program.

1.3.1 The planning processes must incorporate **formative and summative reviews** of student achievement including, but not limited to: COMLEX-USA Level 1 and COMLEX-USA Level 2 passage rates; licensure, geographic area of practice, obtainment and completion of a postdoctoral program, and AOA or ABMS board certification.

Guideline*: Strategic planning is essential to ensure the quality of the osteopathic medical education program. An assessment program should be an ongoing, systematic process that provides the means for assessing student achievement, program effectiveness, and opportunities for improvement.*

1.4 The COM must have a process that will contribute to the advancement of knowledge through research and scholarly contributions in the fields of the basic biomedical sciences, clinical medicine and osteopathic principles and practice.

Guideline: *Contributing to the existing body of knowledge is an important component to osteopathic medical education and higher education.*

1.5 This standard has been eliminated.

1.6 The COM must have a process that addresses the development and planning for the appropriate affiliations necessary to provide predoctoral clinical experiences sufficient in scope for the training of osteopathic physicians.

Guideline: *The COM should demonstrate the educational continuum of its students from predoctoral education, which leads to the professional degree, to placement of graduates in postdoctoral education.*

Standard Two: Governance, Administration, and Finance

2.1 The COM, and/or its parent institution, must develop and implement bylaws, or equivalent documents, that clearly define the governance and organizational structure that enables the COM to fulfill its mission and objectives.

2.1.1 Responsibilities of the COM administrative and academic officers and faculty must be clearly defined in the COM, and/or its parent institution's bylaws, or other equivalent documents.

Guideline: *Clearly defining the COM's, and/or its parent institution's, governance and organizational structure enables others to clearly identify lines of authority and to understand how the COM will meet its mission and objectives.*

2.1.2 The COM or its parent institution must have board approved policies regarding:

a. Conflict of Interest for board members, professional and non-professional full time employees, and all credentialed instructional staff;
b. Due process for all employees, students, and credentialed instructional staff;
c. Claims of illegal discrimination;
d. Confidentiality of employment, student, and medical records; and
e. Fiscal management and accountability of the COM

2.1.3 The COM, and/or its parent institution, must satisfy such provisions as may be required by applicable law and regulations. If the COM is organized within a larger institution of higher education, that institution must have appropriate approval from its U.S. Department of Education-recognized institutional accreditor to offer doctoral programs.

2.2 The **governing body** will confer the degree Doctor of Osteopathy (D.O.) or Doctor of Osteopathic Medicine (D.O.) upon those students who have satisfactorily completed the requirements for graduation and have been recommended for graduation by faculty.

2.3 The COM must have financial resources and reserves to achieve and sustain its educational mission and objectives.

2.4 The **Chief Academic Officer** must have the responsibility and authority for fiscal management of the COM and ensuring compliance with COCA Standards.

Guideline: *This responsibility and authority usually consists of oversight of resources appropriately allocated by the governing board of the COM (if freestanding) or its institutional governing board (if within a larger institution of higher education.*

2.5 The **Chief Academic Officer** must have relevant training and experience.

Guideline: *This experience will usually include but is not limited to: dean, associate dean, assistant dean, or chair of an academic unit at a college of osteopathic medicine, college of allopathic medicine, military or public health facility.*

2.5.1 The **Chief Academic Officer** must have an earned DO degree from a COCA accredited COM.

2.5.2 The **Chief Academic Officer,** at a minimum at the time of appointment, must be a D.O. who has achieved AOA or ABMS board certification in his/her primary specialty at some point in his/her career.

2.5.3 The **Chief Academic Officer** must be employed full time by the COM and will *not* engage in other gainful employment outside the institution.

2.5.4 The **Chief Academic Officer** must be able to demonstrate the "Competencies of a Chief Academic Officer" as defined in the Glossary of this document.

2.6 The COM must have a **Chief Financial Officer** who has training and experience relevant to the position.

2.6.1 For those COMs that are free-standing, single degree-program institutions for which the COCA is the institutional accreditor, the **Chief Financial Officer** must be able to demonstrate the "Competencies of a Chief Financial Officer" as defined in the Glossary of this document.

2.7 The COM's senior administrative leadership must collectively demonstrate experience and training in higher education and medical education.

Guideline: *The senior administrative leadership includes, but is not limited to the* ***Chief Executive Officer****,* ***Chief Academic Officer****, and* ***Chief Financial Officer****.*

2.7.1 For those COMs that are free-standing, single degree-program institutions for which the COCA is the institutional accreditor, the **Chief Executive Officer** must be able to demonstrate the "Competencies of a Chief Executive Officer" as defined in the

Glossary of this document.

2.8 The selection of administrative personnel must not discriminate on the basis of race, ethnicity, color, sex, gender, religion, national origin, age or disabilities.

***Guideline**:* *A diverse administrative staff provides the richness necessary for medical education. A COM should make every effort to hire administrative staff from a diverse background to foster that richness while meeting its mission and objectives.*

Standard Three: Facilities, Equipment, and Resources

3.1 A COM must have available sufficient and appropriate facilities for the program of instruction that enable students and faculty to successfully pursue the educational goals and curriculum of the COM.

***Guideline**:* *Facilities should include appropriate classroom and laboratory space to facilitate attainment of the curricular objectives.*

3.1.1 The COM must have a continuous assessment process that reviews all facility resources appropriate to achieve the COM's mission and objectives.

3.2 The COM must provide access to appropriate learning resources necessary to support the curriculum.

***Guideline**:* *Resources should include, but not be limited to: information technology; student space for individual and group study; and electronic resources, including databases for learning.*

3.3 The learning resources of all campuses and affiliated teaching sites must be reviewed by the COM to ensure delivery of the curriculum.

***Guideline**:* *The COM should identify the specific learning resources necessary for their students at each affiliated site. COMs should conduct an evaluation of all affiliated sites to ensure each site has the necessary space, technology, and other material as identified by the COM.*

Standard Four: Faculty

4.1 The COM must have sufficient and appropriately trained faculty, supplemented by part time and **adjunct faculty**, at the COM to meet its mission and objectives. The COM must also have sufficient and appropriately trained faculty at its affiliated and educational teaching sites.

***Guideline**:* *A well-functioning COM should have enough faculty members to conduct the work of committees; ensure that all lecture topics are covered; allow all students to have access to faculty for consultation; and provide advisement to student organizations.*

4.1.1 The COM must develop a **faculty adequacy model**[1] appropriate to the COM's mission and objectives and curriculum delivery model. The method used to calculate the model must be fully described and documented. Faculty must include osteopathic physicians, basic scientists, and other qualified faculty to carry out the COM's mission and objectives.

4.1.2 The COM must academically credential or approve the faculty at all COM and COM-affiliated and educational teaching sites.

***Guideline**: The process should be consistent with the COM's established faculty academic credentialing or approval procedures and should include regular reviews based upon the COM's established methods of faculty evaluation.*

4.2 The **Department Chair or Equivalent** must have proven experience in teaching and academic leadership in a medical education setting.

4.2.1 In the clinical department or discipline of Primary Care (defined as Family Medicine, Internal Medicine, and/or Pediatrics), the **Chair or Equivalent** must be a D.O who is AOA or ABMS board certified in their primary specialty.

***Guideline**: The COM should have an organizational structure that can provide faculty leadership. This can be done through faculty departments or divisions.*

4.2.2 In the discipline of Osteopathic Manipulative Medicine/Neuromusculoskeletal Medicine, the **Department Chair or Equivalent** leader must be AOA board-certified through the American Osteopathic Board of Neuromusculoskeletal Medicine or have received a Certificate of Special Proficiency in Osteopathic Manipulative Medicine (C-SPOMM).

4.2.3 In all other clinical departments or disciplines, the **Department Chairs or Equivalents** must be AOA board-certified or ABMS board-certified physicians in one of the disciplines included within the department.

***Guideline**: COMs are highly encouraged to have osteopathic physicians as the chairs of all clinical departments and divisions in their COMs. This will ensure expression of osteopathic tenets throughout the curriculum and adequate mentoring opportunities for the students.*

4.2.4 In all departments of the COM, the **Department Chair or Equivalent** must be able to demonstrate the "Competencies of a Department Chair or Equivalent" as defined in the glossary of this document.

1 A conceptual definition is provided in the Glossary. For questions about implementation, please contact the COCA Secretary.

4.3 The selection of faculty must not discriminate on the basis of race, ethnicity, color, sex, gender, religion, national origin, age or disabilities.

Guideline: *A diverse faculty provides a richness necessary for medical education. A COM should make every effort to hire faculty from a diverse background to foster that richness while meeting its mission and objectives.*

4.4 COMs must develop and implement an ongoing needs-based, assessment driven faculty development program that is in keeping with the COM's mission and objectives.

Guideline: *The ongoing faculty development program should be a needs-based professional development program. The participants' educational outcomes should be assessed and utilized by the COM for further faculty development planning*

4.4.1 The faculty development program must include the knowledge and understanding of osteopathic philosophy and principles.

Guideline: *All faculty, on-campus and off-campus, should participate in a comprehensive osteopathic philosophy and principles faculty development program.*

4.5 A faculty organization that serves as a representative forum for the free exchange of ideas and concerns of all faculty must be developed and implemented.

4.6 Faculty policies and procedures must be developed, adopted, and implemented.

Guideline: *Faculty policies and procedures should address faculty recruitment, promotion, appointments, re-appointments, tenure, academic assignments and responsibilities, sabbaticals, reporting relationships, grievance, conflicts of interest, and benefits.*

4.7 The COM must have a board approved code of academic and professional ethics for its entire faculty, administration, and staff that includes the interaction of these groups. Such code of ethics shall address the proper relationship of faculty, administration, and staff with students.

Guideline: *A statement of professional ethics for a COM should address most, if not all, of the following principles:*

- *Duty to adhere to policies and procedures of the COM in all matters;*
- *The student – faculty interaction;*
- *The student – administration interaction;*
- *The student – staff interaction;*
- *The faculty - administration & staff interaction;*
- *Intellectual honesty in teaching activities;*
- *Promotion of learning by students;*
- *Pursuit of innovation in medical education;*
- *Scholarly activity by faculty and students;*
- *Intellectual honesty in scholarly activities;*
- *Research; and*
- *Relationship with commercial entities.*

4.7.1 The COM must have adopted the Code of Ethics established by the American Osteopathic Association.

Standard Five: Students

5.1 The COM must adopt admissions policies and criteria designed to meet its mission and objectives.

5.1.1 To ensure the COM meets its mission and objectives, the COM must tie its admission process and criteria to the outcome performance of its graduates.

***Guideline**: Tying the admission process and admission criteria to the outcome performance should validate that the COM is admitting students who may be expected to have the ability to complete the curriculum of study in accordance with the COM's mission and objectives.*

5.2 The COM must develop and implement a student recruitment process that attracts and maintains a qualified applicant pool.

5.3 The minimum requirement for admission to a COM must be no less than 75 percent of the credits needed for a baccalaureate degree from a college or university accredited by an agency recognized by the United States Department of Education.

***Guideline**: The COM should document alternative educational experiences that it will accept for admission.*

5.3.1 The COM must have a policy to verify that candidates with credentials from a college or university outside of the United States have met the equivalency of the minimum requirements for admission to a COM.

5.3.2 Recruitment and selection of students for admission to a COM must not discriminate on the basis of race, ethnicity, color, sex, gender, religion, national origin, age or disabilities.

***Guideline**: A diverse student body provides the richness necessary for osteopathic medical education. A COM should make every effort to recruit students from a diverse background to foster that richness while meeting its mission and objectives.*

5.4 Each COM must develop transfer credit and waiver policies and procedures in accordance with its educational mission and objectives.

5.4.1 Credits may be transferred only from medical schools and colleges accredited either by the COCA or by the Liaison Committee on Medical Education (LCME). Transfer credits should only be given is the student is eligible for readmission to the previously attended COCA or LCME accredited medical school.

5.4.2 When a student transfers from one COM to another COM, the last two years of instruction must be completed within the COM granting the D.O. degree.

5.4.3 When students transfer from an LCME accredited medical school or college to a

COM at least two years of instruction must be completed within the COM.

5.4.4 In the case of LCME transfers, the COM requirement for osteopathic manipulative medicine must be completed prior to graduation.

Guideline: *Transfer credits should only be given if the student is eligible for readmission to the previously attended COM or other LCME medical school.*

5.4.5 The transfer of credit policy of each COM must be publically disclosed in accordance with 34 CFR 668.43(a)(11) [1]; and

5.4.6 The transfer of credit policy of each COM must include the criteria established by the COM regarding transfer of credit.

5.4.7 Each COM, for which the COCA is its institutional accreditor, shall establish written policies and procedures and employ them in a systematic review of the assignment of **credit hours** for all of its curriculum, using the definition of a **credit hour** as provided in the glossary of the *Accreditation of Colleges of Osteopathic Medicine: COM Accreditation Standards and Procedures*. The COM bears the responsibility of assigning the amount of credit awarded for student work and demonstrating that its assignment criteria conform to commonly accepted practices in higher education. The COM must maintain records of this activity in a format that will permit sampling by a COCA site visit team.

Guideline: *The COM is strongly encouraged to include a discussion of the application of these policies and procedures for reviewing the* ***credit hours*** *given for each course in its curriculum in the self-study report.*

5.5 The COM, and/or its parent institution, must provide services devoted to student affairs.

Guideline: *The COM, and/or its parent institution, should have sufficient full-time employees to deliver these services.*

5.5.1 The COM, and/or its parent institution, must provide services devoted to registrar services.

Guideline: *The COM, and/or its parent institution, should have sufficient full-time employees to deliver these services.*

5.5.2 The COM, and/or its parent institution, must provide services devoted to admissions.

Guideline: *The COM, and/or its parent institution, should have sufficient full-time employees to deliver these services.*

5.5.3 The COM, and/or its parent institution, must provide services devoted to financial

[1] 34 CFR 668.43 (a)(11): A description of the transfer of credit policies established by the institution which must include a statement of the institution's current transfer of credit policies that includes, at a minimum – (i) Any established criteria the institution uses regarding the transfer of credit earned at another institution; and (ii) A list of institutions with which the institution has established an articulation agreement.

aid.

Guideline: *The COM, and/or its parent institution, should have sufficient full-time employees to deliver these services.*

COMs should provide, on an annual basis, counseling to its students regarding their level of indebtedness.

5.5.4 The COM, and/or its parent institution, must provide services devoted to academic counseling.

5.5.5 The COM, and/or its parent institution, must provide services devoted to career counseling.

5.5.6 The COM, and/or its parent institution, must provide students' access to administrators and faculty.

Guideline: *Opportunities to consult with faculty should be available and made known on a regular and ad hoc basis.*

Opportunities to consult with members of the administration should be available and made known to each student.

5.5.7 The COM and/or its parent institution must make available to students confidential resources for physical healthcare services.

5.5.8 The COM and/or its parent must make available to students on a 24 hour per day 7 days a week ("24/7") basis, confidential resources for behavioral healthcare services.

5.6. The COM, and/or its parent institution, must develop an orderly, accurate, confidential, secure, and permanent system of student records.

Guideline: *All staff who provide student services should be knowledgeable of the confidential aspects of these services, including but not limited to FERPA, HIPAA, and Title IX requirements.*

5.7 The COM, and/or its parent institution, must publish, at least every other year, via paper document or on its website, information on policies and procedures on academic standards, grading, attendance, tuition fees, refund policy, student promotion; retention; graduation; academic freedom; students' rights and responsibilities, including a grievance policy and appeal procedures; and other information pertinent to the student body.

5.8 The COM, and/or its parent institution, must publish policies and procedures regarding student complaints related to accreditation standards and procedures, and must maintain records of the receipt, adjudication, and resolution of such complaints. The COM must include in its policies and procedures the contact information, including address, phone number and email, of the COCA in the American Osteopathic Association, Department of Accreditation, 142 East Ontario, Chicago, IL, 60611, 312-202-8000, email:

predoc@osteopathic.org.

Guideline: *The COM should utilize student complaints in its ongoing performance improvement processes, as appropriate.*

Standard Six: Curriculum

General Requirements

6.1 The COM must develop and implement a method of instruction and learning strategies designed to achieve its mission and objectives.

Guideline: *A COM can implement their curriculum utilizing different curriculum models. The curriculum should at least include, but not be limited to, the following areas of biomedical sciences and disciplines related to osteopathic medicine: principles, history and practice of osteopathic medicine, human anatomy, biochemistry, pharmacology, genetics, physiology, pathology, microbiology, physical and differential diagnosis, medical ethics and legal aspects of medicine; internal medicine, family medicine, pediatrics, geriatrics, obstetrics and gynecology, preventive medicine and public health, psychiatry, surgery, radiology, and basic knowledge of the components of research.*

6.1.1 The minimum length of the osteopathic medical curricula must be at least four academic years or its equivalent as demonstrated to the COCA.

Guideline: *The curriculum should provide at least 130 weeks of instruction.*

6.2 The COM must develop and implement ongoing review and evaluation of the curricula, and demonstrate application of the findings towards improvement of the educational program.

Guideline: *The COM should have a Curriculum Committee to conduct the curricula review and evaluation. The Curriculum Committee should be comprised of sufficient faculty representation to ensure a thorough review of the curriculum. Students should also be represented on the Curriculum Committee.*

6.3 The COM must provide for integration of osteopathic philosophy, principles and practices, including didactic and hands-on opportunities, through each year of the curriculum.

Guideline: *The COM should be able to present a broad based curriculum to their first and second year students that includes direct and indirect OMM techniques and understanding of the glossary of terms found in the Glossary of Osteopathic Terminology © American Association of Colleges of Osteopathic Medicine, Chevy Chase, MD, April 2009. The COM should have in place learning programs in OMM/OPP for students during their third and fourth years that include both didactic content (may be delivered by* ***distance education*** *technology) and hands-on opportunities under faculty/preceptor supervision which include osteopathic physicians. The assessment process through all four years should be appropriate for both cognitive and* *psychomotor learning.*

6.3.1 The COM must provide each student with opportunities for both observation and hands-on application of OMM to patients in a clinical setting supervised by full time faculty of the COM.

Guideline: *Observations and hands-on opportunities for OMM can be provided in a college setting, primary care office, student clinic, or hospital setting.*

6.4 The COM must help to prepare students to function on health care teams that include professionals from other disciplines. The experiences should include practitioners and/or students from other health profession and encompass the principles of collaborative practices prior to graduation from the COM.

Guideline: *Competencies for **interprofessional collaborative practice** may include the ability to:*

1. *Work with individuals of other professions in a climate of mutual respect.*
2. *Apply knowledge of the osteopathic physicians' and other professionals' training, knowledge, skills and competencies to address the health care needs of the patients and populations served.*
3. *Communicate with patients, families, communities, and other professionals in a manner that supports the team approach to the care of the patient, the maintenance of health and treatment of disease.*
4. *Apply principles of team dynamics to plan and deliver patient/population centered care that is safe, timely, efficient and effective.*

Core Competencies

6.5 The COM must stipulate specific educational objectives to be learned in its educational program.

Guideline: *The COM should also stipulate the course of instruction designed to address the educational objectives, and the faculty responsible for offering the instruction.*

6.5.1 At minimum, a graduate must be able to:

1. Demonstrate basic knowledge of osteopathic philosophy and practice and osteopathic manipulative treatment;
2. Demonstrate medical knowledge through one or more of the following: passing of course tests, standardized tests of the NBOME, post-core rotation tests, research activities, presentations, and participation in directed reading programs and/or journal clubs; and/or other evidence-based medical activities;
3. Demonstrate interpersonal and communication skills with patients and other healthcare professionals;
4. Demonstrate knowledge of professional, ethical, legal, practice management, and public health issues applicable to medical practice;
5. Demonstrate basic "basic support skills," as assessed by nationally standardized evaluations.

6.6 The COM must define, publish, and implement educational outcomes, based on its own educational objectives that will prepare students for osteopathic graduate medical education consistent with the COM's mission, goals, and objectives.

6.6.1 The COM must establish clinical **core competencies** and a methodology to ensure they are being met.

Guideline: *Osteopathic medical students should have the basic skills and competencies defined by COM faculty as the prerequisites to osteopathic graduate medical education.*

Integration of basic skills and competencies should be developed through the use of standardized patients, skills testing, and clerkship training.

The COM should, at minimum, consider the Seven ***Core Competencies*** *required of all AOA-accredited postdoctoral training programs. The seven competency areas include: medical knowledge; osteopathic philosophy and osteopathic manipulative medicine; patient care; professionalism; interpersonal & communication skills; practice-based learning and improvement; and systems based practice. For details on the requirements and* ***Guidelines*** *of the core competency program, please refer to the AOA's Core Competency Compliance Program as described in the document entitled "The Basic Documents for Postdoctoral Training", Part One: Basic Document for Postdoctoral Training, Section IV. Institutional Requirements, Subsection I. Core Competency Requirements or contact the AOA's Division of Postdoctoral Training at 312.202.8000.*

6.7 A longitudinal record marking the career tracks, choices, and achievements of the graduates must be included in an assessment system.

6.8 The COM must develop and publicize a system, in keeping with the COM's mission and objectives, to assess the progress of each student toward acquiring the competencies essential to effective performance as an osteopathic physician.

6.8.1 All students must take and pass the National Board of Osteopathic Medical Examiners, Inc. (NBOME) Comprehensive Osteopathic Medical Licensing Examination COMLEX-USA Level 1 prior to graduation. All students must take COMLEX-USA Level 2 Cognitive Evaluation (CE) and Performance Evaluation (PE) components prior to graduation. All students who enter in the 2004-2005 academic year or later, and all students who graduate after December 1, 2007, must also pass NBOME Cognitive Evaluation (CE) and Performance Evaluation (PE) components of COMLEX-USA Level 2 prior to graduation.[1]

6.8.2 A component of this assessment must include the student performance and the

1 Students graduating prior to December 1, 2007 were required to have ***taken*** COMLEX-USA Level 2 CE and PE prior to graduation.

COM's overall performance on the NBOME COMLEX-USA Levels 1, 2, and 3.

6.8.3 The COM must track COMLEX-USA Levels 1, 2, and 3 results as part of a process to determine how well students accomplish the COM's educational goals.

Guidelines: *The assessment process should provide assurance that the COM's students have met all requirements for the D.O. degree prior to conferral of that degree.*

The system of assessment should clearly define procedures for the evaluation, advancement and graduation of students. It should provide feedback to each student and should serve as a motivating factor in improving student performance.

Clerkship Training

6.9 A COM may offer a portion of its curricula at affiliated or educational clinical sites not owned or operated by the COM. Written affiliation or educational agreements with core rotation sites, which clearly define the rights and responsibilities of both parties, must be obtained between the COM and each clinical clerkship teaching facility not owned or operated by the COM, or in the case where an institutional agreement is not applicable, between the COM and the individual preceptor.

6.9.1 Osteopathic medical education must include student experiences with the clinical practice of osteopathic physicians.

Guideline: *"Experience with the clinical practice of osteopathic physicians" should be interpreted broadly to include Osteopathic Principles and Practices as well as Osteopathic Manipulative Medicine. Standard 6.9.1 may be met through early clinical experience, core, selective and/or elective rotations.*

6.9.2 The COM must provide an annual prospective and retrospective assessment of the adequacy of affiliations for predoctoral clinical education.

Guideline: *The COM's annual assessment should provide evidence of having secured the necessary affiliations for all students' required core clinical rotations and retrospectively assess the availability of "elective" clinical rotations.*

6.9.3 The COM must conduct an annual assessment of the numbers of students and areas of instruction that are to take place at each of its affiliated clinical education sites.

6.10 The COM must develop and implement its clinical clerkship training curricula to achieve the COM's mission and objectives.

6.10.1 The COM must utilize the clinical education capabilities of its Osteopathic Postdoctoral Training Institution (OPTI) partners to offer predoctoral clinical education clerkships to its students.

Guideline: *The COM may also offer clinical rotations at affiliated sites that are outside of its OPTI partners.*

6.11 All instruction at the affiliated or educational sites must be conducted under the supervision of COM academically credentialed or approved faculty.

Guideline: *The Dean or the Dean's designate is responsible for ensuring that meaningful educational experiences should be conducted at **affiliated clinical sites** including credit-based international sites.*

It is the responsibility of the COM administration to review the credentials of all academically credentialed or approved faculty to determine that they are qualified, or to have an affiliation agreement with such clinical sites which recognizes and approves the processes by which faculty at those sites are credentialed and approved (that are consistent with the credentialing policies of the COM). The training environment at affiliated educational sites should also be reviewed to guarantee that they provide students, at a minimum, an appropriate number of clinical presentations, appropriate supervision, and opportunities to interact with other healthcare professionals.

The individuals supervising students' clinical experiences should be the same as those who were appointed or credentialed by the COM, or approved or credentialed by the affiliate as provided for in the affiliation agreements.

6.12 Planning and implementation of instruction at affiliated or educational sites must be a cooperative activity between COM academically credentialed or approved faculty at those sites and the administration and faculty at the COM.

6.13 The COM must develop and implement an assessment process that reviews student achievement in the clinical education program at its affiliated or educational sites to ensure that these programs meet the COM's mission and objectives.

6.14 The COM must develop a process that evaluates the clerkship in regards to meeting the COM's mission and objectives.

Guideline: *The COM should hold the affiliated or educational site to its established goals and objectives, and conduct routine, periodic visits to ensure the goals and objectives are being met. The COM may also wish to utilize the OPTI to ensure the COM's OPTI's goals and objectives of the clerkships are being met.*

Standard Seven: Research and Scholarly Activities

7.1 The COM must make contributions to the advancement of knowledge and the development of osteopathic medicine through scientific research. This effort may include, but may not be limited to, the conduct of and resulting publication in peer-reviewed journals of "bench" research, clinical trials, patient care research, medical educational research, and health services research. The **faculty adequacy model**[1] must demonstrate adequate faculty time for

1 A conceptual definition is provided in the Glossary. For questions about implementation, please contact the COCA Secretary.

research efforts.

Guideline: *A functioning research program would include some, if not all, of the following elements: research programs that investigate questions arising from the unique elements and applications of the principles and practices of osteopathic medicine; an Institutional Review Board (IRB); Institutional Animal Care and Use Committee (IACUC); dedicated facilities to conduct research, either at the COM or with a partnering institution; evidence of start-up funding for research; a grants officer; pre-award and post-award management of grants; and evidence of published articles in scholarly journals.*

7.2 The COM must show its commitment to research by having a strategic plan for research support, development, and productivity that is linked to faculty adequacy, facilities, outcome goals, and budget.

Guideline: *Growth and development of research is closely linked to availability of human, financial, and physical resources required to support research efforts, as well as the education of osteopathic physicians to prepare them for conduct of research. COMs can enhance this in many ways, including, but not limited to: having an expectation for research in the culture and expected outcomes of the institution; providing appropriate protected time for faculty to engage in research; providing funding to support research initiatives; providing facilities and resources required to support research efforts; supporting dual degree programs in research disciplines, i.e. leading to the MS and PhD degree; dual degree programs in other professional areas that are supportive of research, e.g. MPH, MEd; sponsorship or support for research fellowships for students and residents.*

Standard Eight: GME Outcomes[1]

8.1 The COM must be a member of an Osteopathic Postdoctoral Training Institution (OPTI) that is accredited by the American Osteopathic Association's Council on Osteopathic Postdoctoral Institutions for the purpose of supporting the continuum of osteopathic education.

8.2 The COM must establish a relationship with an OPTI and facilitate the development, growth and maintenance of graduate medical education.

8.3 The COM must develop a retrospective GME Accountability Report based on information reported by the COM on the AACOM Annual Report demonstrating that the COM's mission and objectives are being met. The methods used to develop the report must be fully described and documented. The report must demonstrate the number of graduates entering GME, the positions available in the COM's affiliated OPTI, the historic percentage of match participation (AOA, NRMP, military, etc.), final placement, the number/percentage of eligible students unsuccessful in the matches, and the residency choices of its graduates.

Guideline: *COMs should strive to place 100% of their graduates into GME programs*

1 NOTE: The following standards occur in other standard domains in this chapter and have some components that are related to graduate medical education: 1.1, 6.6, 6.6.1, 6.7, 6.8.2, 6.8.3, 6.10.1, and 6.14.

and devote the necessary resources to obtain that goal.

8.4 The COM must develop and publicize a system, in keeping with the COM's mission and objectives, to assess the progress of each student toward acquiring the competencies essential for successfully entering into a GME program leading to graduation and effective performance as an osteopathic physician.

8.5 The COM must annually report publicly, beginning with the 2013-2014 academic year, from the previous four academic years, the following data (a. and b. below) on its website, in its catalog, and in all COM **promotional publications** that provide information about the COM's education for prospective students. The COM may use a reference to this data as to where it can be found on the COM's website.

a. The number of students from each graduating class who applied to and obtained or were offered placement in a graduate medical education program accredited by the American Osteopathic Association or the Accreditation Council for Graduate Medical Education or the military, and the number of students from each graduating class who applied to and were unable to obtain placement in an accredited graduate medical program.[1]

b. The first time pass rate of its graduates on the COMLEX-USA Level 3 exam.[2]

2 The COMLEX-USA Level 3 examination first time pass rates are reported as an aggregate score to all COMs for a single year period. This is the value that is to be published by the COM.

Standard Nine: Prerequisites for Accreditation (for Pre-accreditation evaluations only)

9.1 Each applicant must obtain any charter, licenses or approvals required for it to function as a COM in the jurisdiction in which it intends to operate.

9.2 Each applicant must have a **governing body**, or be part of a higher education institution with a **governing body**, which defines the mission of the institution and the intended COM.

9.3 Each **governing body** will adopt bylaws, or equivalent documents, which will:

9.3.1 Ensure that the **governing body** will be composed of persons with demonstrated expertise required to implement the mission of the COM.

9.3.2 Define responsibilities of the **governing body**, the administrative and academic officers and the faculty and set forth the organizational structure of the COM; and

9.3.3 Satisfy such provisions as may be required by applicable law and regulations.

Revision of Standards

The COCA, in establishing procedures for the review of the accreditation documents, recognizes the need for an ongoing review process. Therefore, the *COM Accreditation Standards and Procedures* will be reviewed for relevancy on a continuous basis, with a major review every three (3) years. That review will be precipitated by a survey to determine whether the intent of the standard is clear, reliable and whether it is relevant to osteopathic education. The COCA will announce the review process via the COCA website, http://www.aoacoca.org. This announcement will include information about the process and its timeline.

A survey of the standards, policies and procedures will be conducted prior to the initiation of the accreditation document review process. The survey document will query respondents to evaluate the accreditation document as it relates to the a) quality of osteopathic medical education, and b) the relevancy of the educational training needs of the osteopathic medical student. The COCA will solicit comments from the following constituents: 1) COM Presidents: 2) COM Deans; 3) COM Faculty; 4) Site Team Evaluators; 5) Directors, Medical Education; 6) Directors, Residency Programs; 7) Members, Specialty College Evaluator Committees; 8) COM Students; 9) recent COM Graduates; 10) Osteopathic Licensing Boards; 11) NBOME; 12) Hospital Administrators; 13) AOA Board of Trustees; and 14) COCA Members.

Once the COCA has initiated the accreditation document review process, the review will be completed within twelve months. Changes to the document *Accreditation of Colleges of Osteopathic Medicine*, including the policies, procedures, and scope of accreditation of the COCA, will be made when necessary only after providing advance notice and opportunity for comment by affected persons, institutions, and organizations, including, but not limited to: The Secretary of the USDE, **AACOM**, the NBOME, and each COM.

CHAPTER II: APPLICANT AND ACCREDITATION PROCEDURES

Introduction

COM development is meant to be an orderly process that requires time, financial reserves and planning. This process should not be embarked upon at an accelerated rate or without careful consideration of the **minimal timelines** that are discussed in this chapter and in the tables and other documents specifically described herein.

The COCA believes that the timeline provided is the minimum period necessary to develop a new COM and will not waive its usual timeline procedures to process applications of new COMs. Entities seeking to develop a new COM should be aware of the business risks that are inherent in the development of a new COM.

Applicant Status

Applicant status is the initial step in seeking accreditation. This status is offered without rights or privileges of accreditation, and does not establish or imply recognition by the COCA. Applicant status is granted upon the formal request for evaluation submitted by the **Chief Executive Officer** of the applicant COM. Information regarding "New and Developing COMs" can be found on the COCA website, www.aoacoca.org. This information consists of:

- **A Memo to Prospective Applicants**
- **Startup Costs Estimates**
- **Pre-accreditation Preparation Timetable Calculator Tool**
- ***Accreditation of Colleges of Osteopathic Medicine: COM Accreditation Standards and Procedures***

Pre-accreditation Status

Pre-accreditation status is the second step in seeking accreditation by an applicant COM and is conferred with the privilege of recognition by the COCA, which will be publicly announced. Pre-accreditation status may be granted to COMs that demonstrate the planning and resources necessary to be expected to be able to proceed to Provisional accreditation within five (5) years.

Role of the Dean

It is expected that a Dean, as the **Chief Academic Officer** of the COM, will be hired at least 6 months prior to the submission of the Feasibility Study in the development of the COM and will provide the principle guidance and direction in the development of the COM through all steps of the pre-accreditation process and beyond through Provisional accreditation and into Accreditation. A feasibility study must be prepared and submitted by the **Chief Executive Officer** and the Dean of the applicant COM in order for a COM to be evaluated for Pre-accreditation status. Applicants should also note the minimal timelines for the Provisional accreditation application process as stated in Table 1, and the spreadsheet referred to within Table 1, with regard to the selection of the Dean.

It is also expected that the Dean will hire qualified individuals at the Associate/Assistant Dean level to assist him/her in the development of the COM through the Pre-accreditation status and into the Provisional accreditation status and ultimately progress to Accreditation.

Feasibility Study

An applicant for Pre-accreditation status must submit a Feasibility Study that assesses the viability of the proposed new COM. The COM Dean and administrative team must play an integral role in the development of the feasibility study (see section "Role of the Dean" above).

The financial *pro forma* portion of the Feasibility Study must be conducted by a nationally recognized accounting firm/management firm.

The Feasibility Study must contain documented evidence of:

1. An assessment of the degree of support that the applicant has in the community, county and state, and the respective osteopathic professional associations. The assessment must include a letter of comment from the state osteopathic association for each state in which the applicant intends to have clinical training sites.
2. Incorporation as a new, free-standing applicant as either a non-profit or for-profit corporation with bylaws consistent with the accreditation standards, and with an appointed, functioning **governing body**.
3. For an applicant that is part of a university, the parent institution, of which the COM is a part, must demonstrate clear commitment to the COM's mission, operation, development, and financial support.
4. A charter or evidence of support for approval to grant the Doctor of Osteopathy (D.O.) or Doctor of Osteopathic Medicine (D.O.) degree from the appropriate state agency.
5. Adequate staff support, including but not limited to, the appointment of a **Chief Executive Officer**, a dean/chief academic officer, and a chief financial officer, all of whom will have sufficient professional education and experience to provide leadership during the development of the COM. The **Chief Academic Officer** must have an earned D.O. degree from a COCA-accredited COM, have AOA board certification, and be employed in the development of the applicant COM on a full-time basis.
6. The Dean/**Chief Academic Officer** must have identified the organizational structure to be employed, including all Associate/Assistant Deans and a plan for their hiring at the time of submitting the Feasibility Study. At the time of awarding of Pre-accreditation, all Associate/Assistant Deans must be under contract. The professional education and experience of the Associate/Assistant Deans will be reviewed under Standard 2.7 at the time of initial review of Pre-accreditation.
7. Written verification about the educational planning and progress toward providing for clerkship training opportunities sufficient in number for the clinical curricular experiences of the applicant. Documentation must include an assessment of the impact of the applicant's proposed clerkship training programs upon any osteopathic training programs already in existence at the clinical sites under discussion.
8. Adequate financial support that includes sufficient operating, reserve, and necessary construction funds:
    a. Sufficient funds will be available to support all necessary and proper expenses, the

employment of a core staff, the development of curriculum or curricula, support of administration and planning personnel, and will include such other funds as may be necessary to secure funding from governmental or private sources.

b. The applicant will demonstrate that the level of funds described immediately above will be available for not less than four (4) years of instruction, i.e., until graduation of the first class of students.

c. An applicant must demonstrate the existence of a minimum segregated, unencumbered reserve fund escrowed until graduation of the first class of students and equal to the *greater* cash value of 1) $12,500,000; or 2) tuition multiplied by the number of students of the inaugural class multiplied by four years. An increase in tuition will require recalculation of the escrow amount and an increase in the calculation of the amount of the escrowed funds. **The escrowed reserve fund** must **not be borrowed or pledged funds and** must **be 100% wholly owned assets of the COM or its parent institution.**

d. Except upon written approval of the COCA, such fund will remain segregated and unencumbered; and cannot be used for any purpose including, but not limited to, operation, equipment or construction costs, until after Accreditation status has been granted. The purpose of this fund is to provide substantial financial support for the costs of a teach-out agreement should such an agreement become necessary. The applicant, to achieve its mission and objectives, may use interest earned on such fund at any time.

e. For a state-supported applicant, a letter or statement of commitment is required to document their financial support being available in the amount specified in Procedure 8c for four years.

f. An applicant must also demonstrate the existence of a minimum operating reserve fund equal to one-quarter (1/4) of the amount of the minimum segregated, unencumbered reserve fund. The minimum operating reserve fund must not be borrowed or pledged funds and must be 100% wholly owned assets of the COM or its parent institution.

g. Except upon written approval of the COCA, the operating reserve fund must maintain its minimum value throughout the entire fiscal year of the COM. The COCA may authorize use of this fund for operation, equipment or construction costs. If such use is granted, then the minimum value of this fund must be re-attained at the end of the fiscal year in which the operating reserve fund is reduced below its required minimum value. These restrictions will apply until after Accreditation status has been granted. The new COM, to achieve its mission and objectives, may use interest earned on the operating reserve fund at any time.

h. For a state-supported applicant, a letter or statement of commitment is required to document their financial support available in the amount specified in Procedure 8f for four years.

9. Demonstrate educational planning and noted progress in generating graduate medical education opportunities using a retrospective GME Feasibility Report, incorporating the metrics in the GME Accountability Report in Standard 8.3 that demonstrates the expected placement in GME, including OGME, for their prospective class.* An EXCEL® workbook

for current and projected Clinical Rotations and GME development will be sent to all COMs requesting approval of a new COM. COCA staff will send the workbook and information to complete the workbook after the request for the new COM has been received. COCA Staff will also assist the COM in the workbook completion.

*A COM must demonstrate the feasibility of success for GME placement of its students in order to be approved.

COMs with Hosting Partners

COMs and hosting partners, who are themselves, academic institutions, hospitals, or healthcare systems, require a Memorandum of Understanding (MOU) or legally binding contract that addresses at least the following elements:

These statements must be included at the time a new COM is submitting a feasibility study:

1. A statement of why the COM wishes to enter into an agreement with the "host" institution.
2. A statement that identifies the authority and status of the "host" institution.
3. A statement of contractual agreement and legal obligation that includes:
   a. Fiscal, fiduciary, and marketing relationship;
   b. The rights retained by the COM;
   c. The duties of the COM to the "host" institution;
   d. The rights retained by the "host" institution;
   e. The branding by the COM alone, and any co-branding with the host institution;
   f. Specification of the services being provided by each entity to the other;
   g. Specification of who is the final authority on the curriculum for the COM and the requirements for granting the D.O. degree;
   h. Specification on who awards the D.O degree;
   i. Specification on who is the final authority on the selection of COM students;
   j. Specification on who is the final authority on selection of COM faculty members;
   k. A statement of the term of the agreement;
   l. A statement on how the agreement may be amended;
   m. A statement on how either party may withdraw from the agreement;
   n. A statement that explains whether the MOU reflects the complete agreement between the parties of should be interpreted in light of other agreements between the parties;
   o. A statement that the COM recognizes it is responsible for meeting the COCA standards;
   p. A statement where the COM recognizes it is responsible for handling COCA complaints;
   q. Information, as requested by COCA concerning the "host's" finances and accreditation status;
   r. Verification that students are aware of financial responsibility and student rights in regards to Title IV;
   s. Verification that students are aware that financial aid is no processed through the "host" institution and they are not eligible to participate in Title IV through the "host" institution;
   t. A lease agreement must be a minimum of 10 years in length with at least five (5) year notice of termination.
   u. A minimum period of three (3) years is required for cancellation of any services

affecting students.

v. Upon notice of termination of a lease, a teach-out plan must be submitted to the COCA or the school must be able to immediately demonstrate a new location or lease to be approved by the COCA.

All of the above legal and contractual obligations must be completed prior to the awarding of Provisional accreditation.

Feasibility Study Evaluation

Upon receipt of a completed application with Feasibility Study, the Feasibility Study will be reviewed by the COCA Executive Committee (COCA-EC) to determine if the Feasibility Study materials are technically complete, meaning that if a site visit were to be authorized, it may be reasonably expected that the site visit team will be able to find evidence on-site to assess compliance with the standards and procedures required for the award of Pre-accreditation. This review will occur within sixty (60) days of receipt of the Feasibility Study at a teleconference of the COCA-EC.

The applicant COM will be notified as to the decision of the COCA-EC within fifteen (15) working days of the COCA-EC determination. Upon determination by the COCA-EC that the Feasibility Study is acceptable and technically complete to permit scheduling of an on-site visit, staff will schedule the initial review of Pre-accreditation within forty-five (45) to sixty (60) days after notifying the applicant COM that the Feasibility Study is technically complete and notifying the COM of the findings of the Feasibility Study review, subject to availability of team members.

In the review of a Feasibility Study, the COCA-EC may determine that one or more of the Feasibility Study elements are not technically complete and request additional information before authorizing a site visit. The COCA-EC reserves the right to review this information either by (a) by teleconference meeting, or (b) vote by email.

Pre-accreditation On-Site Visit

The Pre-accreditation on-site visit will be conducted to ensure the accuracy of the Feasibility Study and the following standards found in Chapter I:

- Standard One: Mission, Goals, and Objectives – all standards
- Standard Two: Governance, Administration, and Finance – all standards
- Standard Five: Students – Standard 5.7 and Standard 5.8
- Standard Nine: Prerequisites for Accreditation – all standards

The application, which includes the Feasibility Study, COCA-EC review of the Feasibility Study (including materials requested to establish technical completeness), and the on-site visit report, will be transmitted to the COCA for their decision on the granting of Pre-accreditation status. This review will occur at the next regularly scheduled meeting of the COCA.

Activities Prohibited During Pre-accreditation

The COM holding Pre-accreditation status will <u>not</u> recruit, accept applications from, or admit prospective students. This means that a COM holding Pre-accreditation status must <u>not</u> do any of the following:

- Use solicitation to recruit students;
- Solicit or collect application fees;

- Collect application information, including academic transcripts, Medical College Admissions Test (MCAT) scores, and letters of recommendation;
- Initiate the admission review process;
- Schedule interviews for any potential applicants;
- Offer advice on financial aid; and
- Issue letters of admittance into the COM.

Review of Pre-accreditation

Pre-accreditation status is reviewed on an annual basis for up to five (5) years and the COM will be required to submit an annual report in the format prescribed by the COCA. The COCA will review the annual report, and based on that review, may determine that continuing Pre-accreditation status will be subject to an on-site visit, as necessary.

Accreditation actions taken by the COCA during the period in which a COM holds Pre-accreditation include continuing Pre-accreditation status or withdrawal of Pre-accreditation status, and will be based upon an on-site visit. However, if the COM fails to attain Provisional accreditation status within five (5) years of the Pre-accreditation status award, the COCA will terminate the COM's Pre-accreditation status. Such termination will be published within thirty (30) days of final action.

Provisional Accreditation Status

Provisional accreditation status may be granted to COMs who have achieved Pre-accreditation status and meet the standards of accreditation. In order to assure adequate self-study, timely consideration of information, and provide for faculty and administration development, an institution seeking COCA Provisional Accreditation must conform to these provisions. The COCA may not waive compliance with these procedures.

In order for the COCA to grant Provisional accreditation status to the new COM holding Pre-accreditation status, the new COM will demonstrate that it meets, or will meet at the date proposed for the beginning of its educational program, the accreditation standards as described in Chapter I.

Additionally, a COM must demonstrate the following prior to being granted Provisional accreditation status:

1. Faculty must be hired consistent with the initial hiring plan and pro forma submitted to the COCA.
2. The first and second year curricula must be fully developed.
3. Clinical affiliation agreements sufficient to meet the needs of the curriculum and the students must be signed.

Timetable to Achieve Provisional Accreditation

The Updated Feasibility Study must be submitted a minimum of eighteen (18) months prior to the intended opening date (See Table One for a timetable). This schedule will permit the orderly progression for the COM to begin its inaugural class. However, in order to begin its educational program, a COM seeking Provisional accreditation would need to adhere to the minimum time schedule in Chapter IX, Table One. This schedule will permit orderly consideration of a COM's request for Provisional accreditation status. A COM receiving this status may begin accepting applications.

Updated Feasibility Study Content

The Updated Feasibility Study must contain all pertinent information regarding:

- The COM's compliance with all standards of domains One through Eight, addressed for each individual numbered standard in the domains;
- Administration and operation of the educational program proposed for the COM through graduation of the COM's first class of students;
- Future development plans and other information required by the COCA;
- Written verification of the number of clinical sites to accommodate the entire first class of students at the time of graduation;
- Written verification of clinical sites to accommodate their entire clinical needs; and
- Written verification of the formal affiliation agreements with an adequate number of training positions for the entire required clinical curriculum of the COM. The affiliation agreements must be included in the updated feasibility study.

Evaluation of Updated Feasibility Study

In addition to the information listed above, an acceptable Updated Feasibility Study must address any issues found to be out of compliance or lacking on the Pre-accreditation visit, and not yet found satisfied by the COCA, as well as all standards that will be reviewed on the Provisional Accreditation On-site visit (see below) and with attachments of support.

COCA staff will review the materials submitted to assess the presence of the elements required and note the presence or absence of each of the elements. The presence or absence of this information will be reviewed with the COCA Chair to determine if additional information is required prior to scheduling or at the time of the initial provisional accreditation site visit. The COM will be notified of the results of this analysis. This analysis will be completed with thirty (30) days of receipt of the updated feasibility study. After determining that the updated Feasibility Study is complete, an on-site visit will be conducted.

Provisional Accreditation On-site Visit

The initial Provisional accreditation on-site visit will be conducted to ensure the accuracy of the updated Feasibility Study and compliance with the following standards found in Chapter I:

- Standard One: Mission Goals, and Objectives – all standards
- Standard Two: Governance, Administration, and Finance – all standards
- Standard Three: Facilities, Equipment and Resources – all standards
- Standard Four: Faculty –all standards
- Standard Five: Students – all standards
- Standard Six: Curriculum –- all standards
- Standard Seven: Research and Scholarly Activities – all standards
- Standard Eight: GME Outcomes – all standards

Following receipt of the visiting team's report, the request for the Provisional accreditation status will be considered by the COCA at its next regularly scheduled meeting.

Activities Allowed During Provisional Accreditation

Upon the receipt of Provisional accreditation, the COM will have the right and privilege to solicit applications and admit students, offer medical instruction within the approved osteopathic medical curriculum, and announce its provisional accreditation status. A COM may publicize that it is provisionally accredited. However, Provisional accreditation status may not be designated as "Accreditation" until the COM has received "accreditation" from the COCA.

Review of Provisional Accreditation

Provisional accreditation status will be reviewed for renewal annually by the COCA six to eight months prior to the initial day of classes and then concurrent with the academic progress of the first-, second-, and third-year classes of the COM. In order to obtain continuing provisional accreditation status for the second and each subsequent year of provisional accreditation status, the COM will demonstrate that it meets the standards of accreditation as described in Chapter I through annual submission of an updated Self-Study, and an on-site visit.

In compliance with 34 CFR 602.16(a)(2), Provisional accreditation will be for a period of time not to exceed five (5) years. Provisional accreditation will be awarded to become effective no earlier than July 1 of the calendar year, five (5) years prior to the year in which the COM intends to graduate its first class in the months of May-June.

If the COCA makes a decision to award Provisional accreditation at a meeting that occurs prior to the effective date specified above, the Pre-accreditation status will remain until the effective date of Provisional accreditation, but not for a period to exceed five (5) years of total award. During this interim period, the COM's Pre-accreditation status will be stated as: **"Pre-accreditation with permission to recruit, but not to admit students or offer instruction."**

Timetable to Achieve Accreditation

COMs holding Provisional accreditation status will undergo a Comprehensive accreditation visit directed by the COCA to be scheduled prior to graduation of its first class. The Comprehensive visit will be conducted before March 31 of the year the COM's inaugural class graduates. Provisional accreditation status will expire following the Accreditation award granted by the COCA.

If a new COM fails to attain Accreditation status, the COCA will terminate the COM's Provisional accreditation status. Such termination will be published within thirty (30) days of final action.

Accreditation Status

Accreditation status is the highest level of accreditation awarded, and confers all rights and privileges of accreditation. Accreditation status is reviewed on a seven (7) year survey cycle unless otherwise directed by the COCA for a shorter period. Renewal of accreditation is subject to an on-site visit. Once Accreditation status is attained, the COM will retain that status until such time as it may be withdrawn by the COCA or may be voluntarily withdrawn at the request of the COM.

CHAPTER III: THE SELF-STUDY PROCESS

The Self-Study

The Self-Study is a systematic process of institutional and programmatic self-assessment leading to institutional improvement and providing evidence to the COCA that standards of accreditation are being met. The Self-Study is used, in part, to prepare for the COCA accreditation process prior to a Provisional or Comprehensive on-site accreditation visit. A COM's self-evaluation and assessment should reflect its unique, distinctive organization and be utilized as a frame of reference for the review that the COM's evaluation team conducts and the COCA reviewers assess. A broad Self-Study that exhibits integrity in reporting indicates to the site visit team and the COCA that the COM is serious in their attitude toward self-examination and peer review.

A successful Self-Study will provide valuable information that may be used by the COM for change and improvement of its educational program, organization, budgeting, and planning processes. An effective Self-Study will produce results and recommendations that the COM can utilize and address as well as identify challenges facing the COM in the future. The Self-Study should build on the COM's existing self-evaluation processes in order to add to what is already in place as well as be an indication of where to change their processes through their self-study evaluation.

Preferably, a COM with accreditation status should initiate the self-study process at least twenty-four (24) months before the scheduled site visit. Completed Self-Studies must be sent to the COCA at least sixty (60) days prior to the scheduled date of a Comprehensive or Provisional on-site visit. The Self-Study is to be submitted to: Secretary, COCA; American Osteopathic Association; Department of Accreditation; 142 E. Ontario Street, 6th Floor; Chicago, IL 60611 or via email to predoc@osteopathic.org.

Beginning the process early allows time to address the basic questions that will help to guide the development of the Self-Study:

- Does the COM have a current and appropriate mission, goals, and institutional learning objectives?
- Are the curriculum and resources organized to meet the mission, goals and objectives of the COM?
- What is the evidence that the COM is meeting its mission, goals and objectives?
- How can current assessment processes be utilized in creating the Self-Study, including the strategic planning process and outcomes data?
- What is the structure of the COM? Who are the COM's leaders?
- What are the strengths and weaknesses of the COM?
- Who will be involved in the creation of the Self-Study? Who will lead the process? Who will edit the documents?

Characteristics of an Effective Self-Study

1. *The Self-Study process should be a COM-wide project, rather than the work of a few individuals.*

   The Self-Study is an official COM document; therefore, the individuals chosen to participate in creating the Self-Study should be representative of the COM. All constituencies should be represented on the Self-Study committee, including students for the Comprehensive and

Provisional Self-Study.

An effective Self-Study will draw on the expertise of recognized leaders throughout the organization in order to make the effort credible and to accomplish goals in an efficient way. The Self-Study committee will serve as both the starting point and ending point of the Self-Study document and should continually provide and obtain feedback in order to ensure that all constituencies are informed and involved as the process unfolds. Participants of the Self-Study committee should be noted in the completed document.

2. *Adequate personnel, technical, and financial resources should be provided by the COM administration and Board for the self-study process.*

COM administration and the Board send a clear message to faculty, staff, and students that the Self-Study is an important institutional priority when adequate resources are allocated to assure its timely and effective completion. High expectations for organizational learning from the Self-Study process should be clearly communicated to all constituencies. Evidence of support from administration and the Board motivates stakeholders and keeps them engaged in the process.

3. *The success of the Self-Study will depend on the ability of the COM to add to its ongoing self-evaluation processes.*

The Self-Study should not be perceived as being separate from a COM's existing and ongoing evaluation processes nor should it be the creation of new processes and data for use only in the Self-Study process. Rather, the Self-Study should build on the assessment processes and outcomes already in place within the organization in order to analyze their effectiveness, add to them, and make changes to them as indicated throughout the Self-Study process. In addition, the Self-Study will incorporate data already existing within the organization in its report to provide evidence of institutional compliance with the standards.

An essential element of the Self-Study is to assess the results or outcomes of the COM's efforts in pursuit of its mission, goals, and objectives. While mission, goals and objective statements indicate the desired outcomes, the COM should address the specific criteria utilized to validate outcomes and establish that they have been achieved.

4. *The Self-Study should be a report that meets the needs of the COCA and the site visit team that will be evaluating the COM for accreditation.*

While the Self-Study has several audiences, the COCA is one of the most important. The Self-Study report provides evidence to the COCA and the visiting team that the COM deserves its accreditation status. The Self-Study assists the team in conducting an efficient visit by providing them with important information about the COM, including its mission, goals, objectives, curriculum, and all business, personnel and student processes. The Self-Study will tell the story of the COM to the COCA and the visiting team by presenting evidence of how the COM meets the accreditation standards.

5. *The content of the Self-Study should include information regarding:*

- historical overview of the COM;
- organization of the self-study process;
- mission, goals and objectives of the COM;
- organization of the COM;
- facilities;

- administration;
- faculty;
- students;
- academic resources;
- curriculum, preclinical and clinical;
- assessments utilized by the COM, outcomes, and implications for change;
- recent accomplishments and current concerns;
- achievement of its graduates in relation to the mission of the COM; and
- research

In addition, the COM must include evidence that it is in compliance with its responsibilities under Title IV of the Higher Education Act of 1965 as most recently amended. Separate financial reports, including the audited financial statements, or the appropriate financial reports for state institutions, for at least the last three years, should be included in the Self-Study or, at least, be available to the visiting team on site. The Self-Study should also include information concerning the COM's plans, if any, for proposed changes in curriculum, faculty, staff, students, financial support services, and physical plant development.

Getting Ready for the Self-Study: Planning, Choosing a Model, Establishing Timelines

1. *COM administration should provide direction to the Self-Study committee prior to turning the task of the Self-Study over to them. COM leadership should focus on:*
   - Creating the organizational goals or outcomes for the process. If they believe that there are particular priorities or issues within the organization that need to be addressed, they should be made clear to the committee.
   - Clarifying the values and culture of the organization that the self-study should respect.
   - Suggesting the ongoing evaluation processes that are being utilized by the COM that the Self-Study committee can build on for their report.
   - Understand what is required for compliance with the U.S. Department of Education as well as compliance with the COCA standards and procedures as published in *Accreditation of Colleges of Osteopathic Medicine: COM Accreditation Standards and Procedures*, as most currently revised.
   - Determine the size of the committee based on tasks necessary to complete the Self-Study and consider organization based on smaller work-groups charged with gathering specific information and completing specific tasks.
   - Issuing an appointment letter from the COM **Chief Academic Officer** or **Chief Executive Officer** to committee members stating effective dates of their appointment, describing specific responsibilities and expectations, and other information that may be relevant to the committee's mission in the development of the Self-Study.

2. *Common models that can be used for the Self-Study*:
   - The most common Self-Study model is built from the organization of the standards. This Self-Study model would track the process standard by standard through each of the eight standard domains. A working group could be assigned for each standard domain to prepare and complete the Self-Study.
   - The Self-Study can also be developed in narrative form, addressing themes identified by the COCA or areas within the organization that the institution wishes to emphasize, improvements in institutional structures and processes, and strategic planning processes.

In this model, standards could be grouped together in a way that made sense to the COM, i.e. one working group could be assigned to all assessment processes at the COM.

- The Self-Study may also be developed from selected topics that the institution wishes to address and present to the visiting team and the COCA. Compliance with standards not related to the selected topics would be addressed by providing documentation for the team and the COCA to review.

If a Self-Study model is chosen that is not based on the organization of the COCA accreditation standards, the COM should provide a crosswalk of the Self-Study's organization with that of the COCA accreditation standards for evaluators and reviewers to utilize.

3. *Timelines for completing the tasks involved in producing the Self-Study should be determined by the COM early in the process.*

   These timelines should be realistic and allow opportunity for input by all constituencies, but also consider the deadline for submitting the Self-Study to the COCA. In addition, enough time should be allowed for editing and review by faculty, students and staff for completeness, accuracy, and determining whether the Self-Study has met the goals that were set.

4. *Finalizing the Self-Study.*

   Plan to share the outcomes from the self-study process with all constituencies in the COM community. Doing so will help to prepare faculty, students and staff for the upcoming site visit and enable all concerned to answer questions that may be directed to them by the team in a knowledgeable way as well as receive valuable feedback from constituencies before the Self- Study is published and sent to the COCA.

CHAPTER IV: ON-SITE VISIT PROCEDURES

On-Site Visit Process

On-site visits will be scheduled during the normal periods that the COM is in session. Official holidays, examination periods and days immediately adjacent to them should be avoided. The **Chief Executive Officer** or **Chief Academic Officer**, as appropriate, will be consulted in establishing mutually suitable dates.

If the COCA directs an on-site visit and the COM refuses to permit an on-site visit, and the COM is not on probation, the COCA will reduce that COM's status to Accreditation with Probation. However, if the COM is on probation, the COCA will withdraw accreditation status for reasons of non-compliance with the policies and procedures for accreditation.

For Provisional or Comprehensive on-site visits, the COM's Self-Study is required at least sixty (60) days in advance of the on-site visit date.

Members of the site visit team will be appointed by the COCA from an approved list of evaluators qualified to review the particular standards to be addressed at the on-site visit. The COCA will only use competent and knowledgeable persons, qualified by experience and training, and selected in accordance with conflict of interest and non-discriminatory practices developed and articulated in writing by the COCA.

Provisional and Comprehensive Accreditation On-Site Visits

Provisional and Comprehensive accreditation on-site visits to COMs are scheduled by the COCA to examine compliance with all areas of the accreditation standards. Three (3) days on site are usually required for completion of these on-site visits.

Interim Progress Reviews

An Interim Progress Review ordinarily will require one (1) or two (2) days and will focus on the particular areas about which questions have been raised by the COCA at a previous on-site visit, rather than on the entire COM as in the case of a Provisional or Comprehensive on-site visit.

Focused Visitations

A Focused Visitation will ordinarily require one (1) or two (2) days and will focus on particular area(s) identified by the COCA.

The COCA may require a COM to undergo an on-site evaluation when, in the judgment of the COCA, such an evaluation is warranted.

Composition and Selection of the On-Site Visit Team

For Provisional and Comprehensive on-site visits the team will be comprised of five (5) or six (6) members, one (1) **evaluator trainee** (when appropriate), and one (1) AOA staff member to address all of the accreditation standards. At least one of the team members will be an educator and one will be an osteopathic practitioner.

An Interim Progress Review team will be composed of a sufficient number of evaluators but no more than six (6) evaluators and one (1) AOA staff member to adequately review the findings from the previous on-site visit.

A Focused Visitation team will also be composed of no more than two (2) evaluators and one (1) AOA staff member when conducted to adequately address problems noted in a Provisional or Comprehensive on-site visit, or Interim Progress Review, or other issues identified by the COCA. The Focused Visitation team to review a request for substantive change will be composed of evaluators and one (1) AOA staff member as appropriate for the substantive change. (See Chapter VI)

The COCA will appoint the personnel for site visits. The COCA chair, or his/her designee, selects personnel from the *Evaluators Registry* who have the experience, training, and represent certain areas of expertise to serve on an on-site visit. For each type of on-site visit, each team may have at least one (1) member who is a member of the COCA. Depending on the standards to be addressed, the on-site visit team will be composed of individuals with the following areas of expertise:

- Team Chair
- Administration/Finance
- Student Services
- Preclinical Education
- Clinical Education
- **Evaluator trainee** (when appropriate)

The COCA will seek and receive the concurrence of the COM's **Chief Executive Officer** or **Chief Academic Officer** as to the composition of the team. The names and a brief background about the proposed team members will be provided to the COM's **Chief Executive Officer** or **Chief Academic Officer** to determine whether there are any conflicts of interest perceived with any of the proposed members. If the COM finds a real or potential conflict of interest with respect to a proposed team member, the COM must indicate to AOA staff the nature of the conflict of interest. AOA staff will inform the COCA chair, or his/her designee who will take action when deemed necessary.

Observers

Observers may, upon formal request and approval by the COCA chair accompany, on-site visit teams. Each observer must not be in violation of the conflict of interest standards as adopted by the COCA. **Observers** from the USDE, and the Council for Higher Education Accreditation, and those who represent Federal or State agencies or organizations, which may have a legitimate accreditation responsibility, may also accompany on-site visit teams. Costs incurred by this observer will be paid by the observer's organization.

Observers on an on-site visit of a COM will abide by the following procedures:

1. The **observer's** function is generally limited to gathering first-hand information regarding the on-site visit procedures of the COCA.
2. The **observer** is not a consultant to either the on-site visit team or COM, and should be careful not to be drawn into the team as an active member.
3. Approved **observers** may attend all phases of the on-site visit, including the entrance and exit conference, subject to the approval by the **Chief Executive Officer** or **Chief Academic Officer** of the COM and the chair of the COCA on-site visit team.

Observers must agree to honor the confidentiality of the standards adopted in this document.

4. If, at the completion of the on-site visit, the team asks the **observer** for comments on the team's performance, it is appropriate for him/her to inform the team of the major points that will be reported to that **observer's** agency or institution.

5. Each **observer's** agency or organization should provide, in advance, their official set of criteria to be used to evaluate the site visit team performance.

6. In assessing the competence of an on-site visit team, the **observer** should note not only the members' academic competence, but also their understanding of the purposes and procedures of accreditation.

On-Site Visit Agenda

The on-site visit agenda is the scheduled interviews of each team member that will be conducted during the on-site visit. The agenda is a fluid document subject to revisions before and during the on-site visit to accommodate changing circumstances, including unplanned interviews. AOA staff, prepares a draft agenda based on the COM's self-study report. If the on-site visit is an Interim Progress Review or Focused Visitation, the agenda is based upon the issues identified by the COCA, or as required by a substantive change request. After the draft agenda is created, the agenda is presented to the COM for approval. Refer to the *Evaluator Manual* for more information about the on-site visit agenda.

Although the agenda differs based on the demands of the on-site visit, each of the following elements are included:

1. Day 1 of the site visit generally begins with a team planning and document review session. Some of the topics discussed at this meeting include the agenda, review of protocol for team members, identification of areas that need clarification with the **Chief Executive Officer** or **Chief Academic Officer**, and discussion of the materials provided as they relate to the accreditation standards.

2. Also on day 1 of the site visit, an entrance interview with the chief academic officer and others who may be so designated will be conducted to discuss the following topics: the chief academic officer's perceptions of the strengths, challenges, and areas of concern of the program; the team's perceptions of areas which will require exploration and clarification during the on-site visit; discussion of the relationship of the COM to the parent institution, when appropriate; and other subjects selected by the chief academic officer and the Team Chair. The entrance interview will orient the team to particular areas of concern and the chief academic officer to the methods and procedures of the team.

3. A campus tour of the COM including teaching facilities and external clinical sites, as identified.

4. Interviews with the following individuals as determined by the standards to be reviewed: the **Chief Executive Officer** or appointed representative if the COM is part of a university; the **Chief Academic Officer**; chief financial officer; admissions officer; student affairs officer; financial aid officer; department chairs; students; faculty; librarian; and selected standing committees.

5. An open meeting with students (no faculty or administrators present) will be scheduled to provide the team with input on student perceptions regarding the effectiveness of the COM.

6. An open meeting with faculty (no administrators present) to allow the faculty to participate in discussions with the team.
7. Meetings with individual faculty, students and administrators will be conducted at the discretion of the Team Chair or appropriate team member.
8. A team meeting will be held at the end of each full day of the on-site visit to go over any findings the team may have noted, and to begin the report writing process.
9. A final team meeting will take place at the end of the last day of the on-site visit. This meeting will provide an opportunity for the team to further discuss their findings and to review their written report.

At the conclusion of the on-site visit, an Executive Session between the Team Chair and the **Chief Executive Officer** and/or **Chief Academic Officer** will be conducted. The team will give an oral report that will provide the COM with an accurate preview of the final report. During the Executive Session, the COM will be allowed to present additional information to correct any errors the team may have reported. Following the Executive Session, an Exit Conference between the team and representatives of the COM designated by the **Chief Executive Officer** or **Chief Academic Officer** will be conducted. This meeting provides an opportunity for the team to present a brief overview of their findings to the COM's senior administrators and invited guests. At the discretion of the Team Chair and COM President or Dean, the Executive Session and Exit Conference may be combined.

Report Structure

All Provisional and/or Comprehensive site visit reports will consist of the components as described below. Reports of Interim Progress Reviews and Focused Visitations will contain only those components as appropriate.

1. **Site Visit Cover**: The cover page will denote the type of on-site visit, the COM being evaluated, the date of the on-site visit, and includes the following statement: This report has been reviewed by all members of the on-site visit team, and by the COM.

2. **Summary of Due Dates for Continuing and New Requirements**: The summary page is designed to provide an overview of the standard sections that the on-site visit team found to be out of compliance and need further review. Each **Requirement** must be submitted to the COCA in the form of a Progress Report by the due date cited.

3. **Purpose of the On-Site Visit**: The purpose of the on-site visit includes a brief narrative of the reason for the on-site visit; the name and location of the COM; and the date of the on-site visit. This narrative will also include whether any previous **Requirements** were reviewed. This narrative is written in paragraph form by the team secretary.

4. **History of Accreditation:** This section will be prepared by AOA staff. It will contain, among other information, a chronological history of the COM's accreditation activities and resulting COCA actions; a brief description of the geographical location of the institution; its public or private status; its relationship with the parent institution, if appropriate; and regional accreditation status, if applicable.

5. **Review of Compliance with the Standards**: Each standard section begins with an Introduction. Each assigned team member will provide a brief, but concise overview

of the COM's standards compliance related to the standards in that particular section.

In addition, each evaluator will write a comprehensive **current finding** on all standards in their assigned domain that are the subject of the site visit review. All **Requirements** must specify the standard or procedure that is being cited and refer to accreditation standards as described in Chapter I.

The visiting team may include **Recommendations** in the team report as a mechanism to provide consultative advice to a COM. Because **Recommendations** are consultative in nature, no further response will be required from the COM. **Recommendations** from previous site visit reports are reviewed by the COCA and subsequent visiting teams for informational purposes only. All **Recommendations** must specify the standard or procedure that is being addressed and refer to accreditation standards as described in Chapter I.

The visiting team may also write **Commendations**. All **Commendations** must specify the standard that is being exceeded and provide the rationale for the finding. **Commendations** can only refer to standards of accreditation as described in Chapter I.

6. **Summary of Requirements**: This summary will contain all **Requirements** written by the visiting team in the order cited.
7. **Summary of Recommendations:** This summary will contain all **Recommendations** made by the visiting team.
8. **Summary of Commendations**: This summary will contain all **Commendations** made by the team in the order cited.
9. **On-Site Visit Team Roster**: The on-site visit team roster lists (on a separate page) each team member's name, title, area of expertise, and team assignment.
10. **Individuals Interviewed and Documents Reviewed**: This section consists of a list of the individuals interviewed (by position only) and materials reviewed by the team and are included as Appendix A. Any clinical sites visited or teleconferences conducted by the team will also be included.
11. **Background Information**: This information includes historical accreditation information and on-site visits. This will be prepared by AOA staff and included as Appendix B.

Financing the Accreditation Process

The accreditation process is funded through annual accreditation fees paid by the COMs. The same accreditation fees will also be charged for **Branch Campuses** and **Additional Locations**.

The AOA will be reimbursed by a COM for the direct costs of an on-site visit. The AOA will bill the COM for these expenses after the conclusion of the on-site visit.

CHAPTER V: ACCREDITATION PROCEDURES

Due Process

All COMs have the right to appear before the COCA to offer testimony on all accreditation actions, including:

1. Applications for Pre-accreditation and its continuation;
2. Applications for Provisional accreditation and its continuation;
3. Applications for Accreditation and its continuation;
4. Review of on-site evaluation reports;
5. Review of Progress Reports;
6. Review of requests for Substantive Change;
7. Changes in accreditation status;
8. Reconsideration; and
9. Appeals

The COCA provides for review of its accreditation actions by first allowing COMs to seek reconsideration before the COCA, and second, if necessary following reconsideration and if requested by the COM, a separate hearing before the COCA Appeals Committee (see descriptions that follow).

All COMs have the right to representation by legal counsel in all appearances before the COCA and its Appeal Panel, including reconsiderations and appeals.

Review of the Accreditation Site Visit Report

A copy of the draft report, including the final **Requirements** and **Recommendations**, will be sent to each team member for review, correction, and/or editing. The on-site visit report will then be transmitted to the COM's **Chief Executive Officer** or **Chief Academic Officer,** as appropriate, for review and correction of errors of fact.

After receipt of the draft report, the COM may request correction of errors of fact. The COM will have up to thirty (30) calendar days from the date of transmission in which to submit written response to the visiting team report, unless the COM requests that this period be waived by the COCA. The visiting team's report will reflect consideration of the COM's comments, as appropriate, and will be forwarded to the COCA. If no comments were received, that fact will also be noted when the report is presented.

The report of each visiting team will be reviewed and evaluated by the COCA. At least one member of the team, preferably the team chair, must be in attendance, either in person or via teleconference.

*If the COM has concerns that the errors in the actions, findings or **Recommendations** of the visiting team have not been resolved, the COM may submit to the COCA additional written information relevant to the questions of accuracy of the report. Because it is intended that the report reflect the findings of the team at the time of the visit, the COCA will retain the right to have such additional written information reviewed by the team chair or other members of the visiting team. It is expected that the COM is to be ready for the visit at the time the visit is conducted.*

The COCA will review the COM Self-Study, as appropriate to the type of on-site visit, the draft report of the visiting team, and any written submissions provided by the COM to address questions of accuracy of the report. The COCA may accept or modify the **Recommendations** made by the visiting team and will specify the reasons for any modifications. The COCA will make the final accreditation decision.

All letters reporting the official actions of the COCA will contain the complete action taken by the COCA, including its findings of deficiencies in meeting the standards for accreditation, and the rationale for changes in accreditation status.

All **Requirement**s issued by the COCA are expected to be addressed by the COM with Progress Reports of corrective action taken to be reviewed at subsequent meetings of the COCA. All Progress Reports will be filed at times as specified in the final site visit report. This date will usually be the first business day of the month preceding COCA meetings (e.g. March 1, July 1 and November 1).

The COCA will notify a COM in writing of any adverse accrediting decision or other action to place the COM on probation or **show cause** for non-compliance with a standard or **show cause** for withdrawal of an accreditation status. The written notice will describe the basis for the action.

Accreditation Decisions

Pre-accreditation Status

Upon receipt of the application for Pre-accreditation status from COMs with applicant status, the COCA will either:

- Approve the request if the requirements for Pre-accreditation status are clearly being exceeded or met; or
- Defer the request if the COCA finds that there are a limited number of requirements for Pre-accreditation that are not met, and the COCA believes that the applicant may be expected to meet the requirements for Pre-accreditation status at the next meeting of the COCA; or
- Deny the request if the COM fails to meet the requirements for Pre-accreditation status or fails to make proper application. The COCA will clearly specify which requirements were not attained. Denial of Pre-accreditation is an **adverse action**.

Provisional Accreditation Status

Upon the application for Provisional accreditation status from COMs with Pre-accreditation status, the COCA will either:

- Approve the request if the accreditation standards are clearly being met or exceeded; or
- Defer the request until the next meeting or other date if the COCA finds that there are a limited number of requirements for Provisional accreditation that are not met, and the COCA believes that the applicant may be expected to meet the requirements for Provisional accreditation status at the next meeting of the COCA; or

- Deny the request, cite the accreditation standards that have not been met by the COM, and continue Pre-accreditation if the COM fails to meet the standards for Provisional accreditation, but has not exceeded the five-year term of the Pre-accreditation status. Denial of Provisional accreditation is an **adverse action**; or

- Deny the request, cite the accreditation standards that have not been met by the COM, and withdraw recognition if the COM fails to meet the accreditation standards, and has exceeded the five-year term of the Pre-accreditation status. Denial of Provisional accreditation is an **adverse action**.

Upon review for renewal of Provisional accreditation status, the COCA will either:

- Approve the request for a renewal period of one (1) year if the accreditation standards are clearly being exceeded or met; or

- Deny the request and deny Provisional accreditation status citing the accreditation standards that have not been met by the COM. Such termination will be published within thirty (30) days of final action. Denial of Provisional accreditation is an **adverse action**.

Upon the initial review for accreditation status prior to the anticipated graduating date of that COM's first class, the COCA will either:

- Award Accreditation if the accreditation standards are clearly being exceeded or met. The date of accreditation will be established as the graduating date for the COM's first class; or

- Terminate Provisional accreditation if the accreditation standards are not being met. Such termination will be published within thirty (30) days of final action.

Accreditation Status

Accreditation is granted when the COM clearly meets the accreditation standards or the COM has a sound overall program, but certain limited number of accreditation standards is not being met. The COCA will specify the standard(s) not being met and clearly note deficiencies. The COM must provide documentation of compliance with the standards within twenty-four (24) months or less as determined by the COCA. The COCA will specify procedures for monitoring compliance, which may include an on-site visit within two (2) years.

All COMs, regardless of accreditation status, must satisfy a **Requirement** within twenty-four (24) months of the initial issuance, except for good cause. If a COM should have its accreditation status reduced, e.g. from Accreditation to Accreditation with Probation, any existent **Requirements** must still be satisfied within the initial period of issuance. This fixed period will not lengthen solely by virtue of a reduction in accreditation status.

The COCA may elect to extend the twenty-four (24) month period for the following good causes:

- Change in **Chief Executive Officer**;
- Change in **Chief Academic Officer**;
- Demonstration of progress on a plan whose fulfillment would require an extension in time; or
- Other substantive financial or administrative changes which affect the operation of the COM

This period of extension is to be determined by the COCA, but must not exceed twelve (12) months in total duration. Failure to meet the **Requirements** as stated by the COCA during the twenty-four (24) month period, including any extension for good cause, will result in denial of accreditation.

Accreditation with Warning

"Accreditation with Warning" or "Provisional Accreditation with Warning" is granted when the COM is found to exhibit weaknesses that threaten the quality of the total program. The COCA will specify the accreditation standard(s) not being met, clearly note deficiencies, and specify the procedures for monitoring compliance. Accreditation with warning status is private between the COCA and the COM. The COCA and the COM will continue to publicly describe the COM's status as "Accreditation" or "Provisional accreditation." The COCA may require the use of a consultant, submission of written reports and/or documents, and other actions or activities as determined by the COCA.

COMs must provide documentation of standards compliance within one year or less as determined by the COCA and will undergo an on-site visit within one year of the COCA's decision of Accreditation with Warning.

The COCA may elect to extend this period for the following good causes:

- Change in **Chief Executive Officer**;
- Change in **Chief Academic Officer**;
- Demonstration of progress on a plan whose fulfillment would require an extension in time; or
- Other substantive financial or administrative changes, which affect the operation of the COM.

This period of extension is to be determined by the COCA, but must not exceed twelve (12) months in total duration. Failure to meet the **Requirements** as stated by the COCA during the twelve (12) month period, including any extension for good cause, will result in denial of accreditation.

At any time during the period a COM has accreditation with warning status, the COCA may require that COM to **show cause** why accreditation should not be denied. The COCA will state, in writing, its reasons for taking this action. The COM will have thirty (30) days in which to respond. The COCA will take action upon the COM's response within thirty (30) days after its receipt.

Accreditation with Probation

"Accreditation with Probation" or "Provisional Accreditation with Probation" is granted when the COM is found to exhibit serious weaknesses in meeting the accreditation standards such that the quality of the total program is in jeopardy. The COCA will specify the accreditation standard(s) not being met, clearly note deficiencies, and specify the procedures for monitoring compliance. Accreditation with probation status is public and notice will be provided to all interested parties. The COCA and COM will publicly describe the COM's status as "accreditation with probation." The COCA will establish a timetable for remediation. The COCA may require the use of a consultant, submission of written reports and/or documents, and other actions or activities as determined by the COCA.

The COCA may elect to extend this period for the following good causes:

- Change in **Chief Executive Officer**;
- Change in **Chief Academic Officer**;
- Demonstration of progress on a plan whose fulfillment would require an extension in time; or
- Other substantive financial or administrative changes, which affect the operation of the COM.

The COCA will determine the extension period, but the extension must not exceed six (6) months in total duration. Failure to comply with outstanding **Requirements** during the six (6) month period, including any extension for good cause, will result in denial of accreditation.

At any time during the period a COM has accreditation with probation status, the COCA may require that COM to **show cause** why accreditation should not be denied. The COCA will state, in writing, its reasons for taking this action. The COM will have thirty (30) days in which to respond. The COCA will take action upon the COM's response within thirty (30) days after its receipt.

Denial of Accreditation

Denial of accreditation may occur at any time that the COM is found to exhibit such weaknesses in meeting the accreditation standards that the quality of the total program is unacceptable. Denial of accreditation will usually be preceded either by accreditation with warning or accreditation with probation. Prior to denial of accreditation, the COCA will require that COM to **show cause** why accreditation should not be withdrawn. The COCA will state, in writing, its reasons for taking this action. The reasons will include citation of all areas of non-compliance with the standards or procedures for accreditation. The COM will have thirty (30) days in which to respond. The COCA will take action upon the COM's response within thirty (30) days after its receipt. Denial of accreditation is an **adverse action**.

Withdrawal from Accreditation

At any time, an accredited COM, or new COM, retains the right to withdraw from the accreditation process. Such requests may be made only in writing by the **Chief Executive Officer** of the COM. **Withdrawal** is an action initiated and taken by the COM. The COCA will notify the USDE of a **withdrawal** from the accreditation process within thirty (30) days of the receipt of the withdrawal.

Notification of Accreditation Decisions

The COM will receive a decision letter from the COCA within 30 days of the meeting. Letters and accompanying documents will be sent to the COM **Chief Academic Officer**. Concurrently, a copy of the letter and accompanying documents will be sent to the Chancellor, Provost, President, or **Chief Executive Officer**, as appropriate.

Appeal Process

Reconsideration of a Decision

A COM has the opportunity to make a request for reconsideration of a COCA Accreditation decision not more than thirty (30) days following the receipt of the COCA decision. A request for reconsideration may be filed by the COM's **Chief Executive Officer**, **Chief Academic Officer**, or other appropriate authority. These requests must be filed, in writing; be accompanied by documentation, data, and other information; and will be limited to:

- Alleged bias, injustice or factual error of sufficient magnitude to warrant a reconsideration of the decision; or
- Departure from the standards of accreditation or established policies and procedures as defined in the document *Accreditation of Colleges of Osteopathic Medicine*.

The COCA will also provide for reconsideration of a decision for purposes of reviewing new financial information if all of the following conditions are met:

- The financial information was unavailable to the COM until after the accreditation action subject to reconsideration and appeal was made;
- The financial information is significant and bears materially on the financial deficiencies identified by the COCA, i.e. the information is of such a nature that if found to be credible it could result in the finding that a deficiency based upon financial resources is now met;
- The only remaining deficiency cited by the agency in support of a final **adverse action** decision is the institution's or program's failure to meet an agency standard pertaining to finances

Such a review of new financial information may only be sought once – through reconsideration and subsequently through appeal - and that the decision made by the COCA is not subject to further appeal.

<u>COCA Reconsideration Hearing</u>

The reconsideration hearing before the COCA will occur at a regularly scheduled meeting of the COCA as an announced agenda item. The COM will receive prior notice as to the date / time/ place of the COCA meeting at least thirty (30) days in advance of the meeting. The COM will have an opportunity to present written and oral testimony at the meeting. The reconsideration hearing will be conducted as described for the appeal hearing before the COCA Appeal Panel.

<u>COCA Reconsideration Decision</u>

The decisions to be made by the COCA following a reconsideration hearing are as follows:

- Affirm the original action of the COCA,
- Amend the original action of the COCA, or

- Reverse the original action of the COCA, based upon finding the presence of bias, injustice, error or departure from the standards and procedures, or
- In the case of a review of new financial findings, determine that the requirements pertaining to financial standards are either met, or not met.

Requests for reconsideration of a COCA decision should be addressed to the Secretary, COCA; American Osteopathic Association; 142 E. Ontario St.; Chicago, IL 60611 or via email to predoc@osteopathic.org. The COCA Secretary will notify the COM of the date of the next regularly scheduled COCA meeting. The COM will be given an opportunity to appear at this meeting and to make a statement or presentation regarding the COCA decision.

Appeal of a COCA Decision

Following the reconsideration of an accreditation action before the COCA, the **Chief Executive Officer** or **Chief Academic Officer** of a COM may appeal a COCA decision within sixty (60) days of receipt of the notice of the final disposition of the request for reconsideration. The COM's current accreditation status, if applicable, will be maintained throughout the appeal process.

The basis of an appeal will be limited to:

- Alleged bias, injustice or error of sufficient magnitude to warrant a change in the COCA's action; or
- Departure from the standards of accreditation or established policies and procedures as defined in the document *Accreditation of Colleges of Osteopathic Medicine*.

The COCA will also provide for the appeal of a decision for purposes of reviewing new financial information if all of the following conditions are met:

- The financial information was unavailable to the COM until after the accreditation action subject to reconsideration and appeal was made;
- The financial information is significant and bears materially on the financial deficiencies identified by the COCA, i.e. the information is of such a nature that if found to be credible it could result in the finding that a deficiency based upon financial resources is now met;
- The only remaining deficiency cited by the agency in support of a final **adverse action** decision is the institution's or program's failure to meet a COCA standard pertaining to finances

Such a review of new financial information may only be sought once, and that the decision made by the COCA (at reconsideration) or at the Appeal Panel is not subject to further appeal.

Requests for appeal must be in writing and should be addressed to the Secretary, COCA; American Osteopathic Association; 142 E. Ontario St.; Chicago, IL 60611 or via email to predoc@osteopathic.org. The notice of an appeal must specifically state the basis for the appeal and will be accompanied by supporting documents, data and other information.

The Secretary of the COCA will notify the COM Appeal Panel, upon the receipt of an appeal.

COM Appeal Panel Composition

The COM Appeal Panel consists of five (5) members, including one (1) public member. These members will be selected from a list of former COCA members who were not COCA members when the COCA made the adverse decision under appeal. The list of former COCA members eligible for participation in the COM Appeal Panel will be reviewed and approved annually by the COCA and will be chosen based upon the following considerations:

- When the COCA is serving as an **institutional accreditor** of the COM, then the panel will include a member with academic background, and a member with administrative background;
- When the COCA is serving as a **programmatic accreditor** of the COM, then the panel will include an educator and a practitioner.

A quorum (simple majority) of the panel must be present for a hearing.

If vacancies occur on the COM Appeal Panel list, the COCA may fill those vacancies at any time during the year by action of the COCA. When possible, the list of seven members will include two former public members of the COCA and at least one member with previous experience as a **full-time faculty** member and/or in academic administration.

The COCA will approve the list of seven former members annually, including their backgrounds. The COM Appeal Panel is subject to the COCA's Conflict of Interest Policy.

COM Appeal Panel Hearing

Within ninety (90) days after receipt of the appeal, the COM Appeal Panel will convene an appeal hearing. The COM will be notified once the hearing date is established. The COM Appeal Panel considers the COM's allegations and any written documentation submitted in support of the allegation. It will also consider, as necessary, on-site visit report(s), including any **Recommendations** and **Requirements**, and any response from the COM; review material from the COCA; and other materials it considers pertinent to the alleged failure of processes, which are the basis for the appeal.

The COM Appeal Panel will first hear a presentation of the COCA's position, which will be given by the COCA chair or the Chair's designee(s). After this presentation, the appellant COM will present its position. Following these presentations, the COM Appeal Panel will have the opportunity to question both parties. Each party will then be given an opportunity for summation of its position. After the summation, the COM Appeal Panel will deliberate in executive session and reach a decision.

COM Appeal Panel Decisions

The COM Appeal Panel will take final action on the appeal and provide a written decision, including a statement of the reasons for the decision, to the COCA and the COM.

The COM Appeal Panel will take one of the following actions:

- Sustain the original action of the COCA, or
- Amend the original action of the COCA, or
- Reverse the original action of the COCA, or
- Remand the original action of the COCA back to the COCA for reconsideration, with specific issues to be addressed by the COCA based upon finding the presence of bias, injustice, error or departure from the standards and procedures.

The COM Appeal Panel may affirm, amend, reverse or remand matters back to the COCA. A decision to affirm, amend or reverse the **adverse action** is implemented by the COCA upon notification by the Appeal Panel. In a decision to remand the matter to the COCA for further consideration, the COM Appeal Panel must identify specific issues that the COCA must address. In a decision that is implemented by or remanded to the COCA, the COCA must act in a manner consistent with the COM Appeal Panel's decisions or instructions.

If the appeal is considering a COCA decision of denial of accreditation, and after the exhaustion of all administrative appeals, upon formal disposition to uphold the COCA decision, the COM may seek reinstatement of accreditation by complying with the requirements for Pre-accreditation.

Monitoring Accredited Programs

The Annual Report

Annually, the COCA will request information about COM class size. This information, which will detail all four years of the COM, will be presented for review and acceptance at a COCA meeting.

The joint AOA/**AACOM** Annual Report of a COM will be presented for consideration by the COCA each year. The COCA may also request an Annual Supplemental Report that will be reviewed in conjunction with data from the AOA/**AACOM** Annual Report annually.

The Annual Report will collect key information, including, without limitation, the following:

- Financial -- revenues and expenditures, and an audited financial statement;
- Student Achievement -- attrition, graduation, participation in match programs for graduate medical education;
- Mid-cycle reporting – this will respond to standard 1.1.1 when applicable;
- GME placement of graduates in OGME and GME programs.

The principal purpose of the Annual Report review will be to determine whether there is credible information to cause the COCA to further investigate whether or not a COM remains in compliance with the standards. Such investigation may consist of any one or more of the following:

- a request for additional written information;
- a request to **show cause** as to why a COM is not in violation of a standard(s); and/or
- a request for COM representatives to appear before the COCA;

- a Focused Visitation as directed;
- a reduction in approved class size as directed by the COCA.

The Progress Report

A Progress Report may be requested when Standard(s) are determined to be "not met". The **Requirement** will explain the deficiency and will indicate to whom the COM must respond. The COM needs to provide all the information necessary as stipulated by the **Requirement**. The Progress Report must be submitted by the due date listed in the **Requirement**, and to: Secretary, COCA; American Osteopathic Association; 142 E. Ontario St.; Chicago, IL 60611 or via email to predoc@osteopathic.org.

The COCA will review reports, which are submitted in fulfillment of a Requirement. The COCA will determine one of the following:

- The **Requirements** will be determined to be "met"; or
- The **Requirements** will be determined to be "not met".

The COCA will document its findings in a report that details the review of the COM's Progress Report, including any recommendations for further Progress Reports. The COCA may also determine that an on-site Focused Visitation be conducted *in lieu* of another Progress Report.

Interim Progress Review

An Interim Progress Review is utilized to examine a COM's response to the findings of a previous Provisional or Comprehensive on-site visit, in which deficiencies were noted and **Requirement**s for compliance with the accreditation standards were stated.

Focused Visitation

A Focused Visitation may be required by the COCA on the basis of problems noted in a Provisional, Comprehensive, or Interim Progress Review site visit which have been determined to not have been adequately addressed. A Focused Visitation may also be required when deemed necessary by the COCA.

CHAPTER VI: USDE REQUIREMENTS

Correspondence with the USDE

The COCA is required to provide the USDE with specific information as prescribed in 34 CFR 602.27.

Annual Information

The COCA will make available to the USDE, on an annual basis, a copy of the following:

- A copy of the COCA's annual report to the AOA House of Delegates; and
- An annually updated copy of its directory of COMs having recognition status from the COCA.

Selected Proposed Changes in Standards and Procedures

The COCA will notify the USDE of any proposed changes in its standards and procedures that might alter:

- Its scope of recognition, or
- Its compliance with the criteria for recognition by the Secretary.

Selected Activities by the COCA

The COCA will submit to the USDE the following:

- A summary of the COCA's major accrediting activities during the previous year (an annual data summary), if requested by the Secretary;
- A decision by the COCA to expand its scope of recognition to include **distance education** or correspondence education as provided in section 496(a)(4)(B)(i)(I) of the **HEA**, which will become effective on the date the USDE receives the notification;
- The name of any COM that the COCA accredits that the COCA has reason to believe is failing to meet its Title IV, **HEA** program responsibilities, or is engaged in fraud or abuse, along with the COCA's reasons for concern about the institution or program.
- If the Secretary requests, information that may bear upon a provisionally accredited or accredited COM's compliance with its Title IV or **HEA** program responsibilities, including the eligibility of the institution or program to participate in these programs.

Ordinarily, the COCA will copy the affected COM on any correspondence with the USDE as described in this section. The need for confidentiality of that contact, based upon the circumstances, will be considered on a case-by-case review. Upon request by the USDE, the COCA must consider that contact confidential.

Distance education

The USDE gives accrediting agencies the authority to conduct accreditation of programs offered by **distance education**. The COCA accredits osteopathic medical schools. The COCA encourages all their accredited schools to be innovative and use multiple methods of instruction to deliver their curriculum. The COCA, however, does not accredit stand-alone on-line medical school programs. The COCA believes that the science and art of osteopathic medicine must be gained by direct, in-person interaction with instructors and clinical education supervisors. For this reason, the COCA will **not** accredit programs offered by **distance education** as defined at 34 CFR 602.3.

USDE Notification

Initial and Continuing Accreditation Decisions

The COCA will provide written notification regarding its accreditation decisions to the Secretary of the USDE, the appropriate state licensing or authorizing agency, the appropriate accrediting agencies, and the public within 30 days after the decision to:

- Award initial and continuing Pre-accreditation
- Award initial and continuing Provisional accreditation
- Award initial and continuing Accreditation.

Adverse Decisions

The COCA will provide written notification regarding its accreditation decisions to the Secretary of the USDE, the appropriate state licensing or authorizing agency, the appropriate accrediting agencies, and the public at the same time as provided to the COM, and within 30 days after it makes either of the following decisions:

- Final decision of probation or equivalent status of an institution or program; or
- Final decisions to deny, withdraw, suspend, revoke, or terminate the accreditation or pre-accreditation of an institution or program.

Written notice to the public, including posting to the COCA website, regarding the above decisions must be made within 24 hours of the notice to the institution or program. In addition, a brief statement summarizing the reasons for the agency's decision, describing the evidence that the affected institution or program was given the opportunity to provide comments, and the comments, if any, that the affected institution or program may have made with regard to that decision will be provided to the Secretary of the USDE, the appropriate state licensing or authorizing agency, the appropriate accrediting agencies, and the public, no later than 60 days after the final decisions.

Withdrawal or Lapses of Accreditation

The COCA will notify the Secretary of the USDE, the appropriate state licensing or authorizing agency, the appropriate accrediting agencies, and, upon request, the public within 30 days of receiving notification from the institution or program if it has decided to withdraw voluntarily from Pre-accreditation, Provisional accreditation or Accreditation.

The COCA will notify the Secretary of the USDE, the appropriate state licensing or authorizing agency, the appropriate accrediting agencies, and, upon request, the public within 30 days of the date on which accreditation or pre-accreditation lapses if the institution or program notifies the COCA that it will not request renewal of its pre-accreditation or accreditation status.

Consideration of Other Accreditors' Actions

As a condition of being recognized as an accrediting agency by the U.S. Secretary of Education, the

COCA is expected to not grant initial or renewed pre-accreditation, provisional accreditation, or accreditation to a COM during a period in which the parent educational institution of a COM or the COM itself:

- Is the subject of an interim action by a recognized **institutional accrediting agency** potentially leading to the suspension, revocation, or termination of any recognition status;
- Is the subject of an interim action by a state agency potentially leading to the suspension, revocation, or termination of the institution's legal authority to provide postsecondary education;
- Has been notified of public probation or a threatened loss of accreditation by a recognized **institutional accrediting agency**, and the due process procedures required by the action have not been completed; or
- Has been notified of a threatened suspension, revocation, or termination by the state of the institution's legal authority to provide postsecondary education, and the due process procedures required by the action have not been completed.

The COCA will provide the Secretary of the USDE, within thirty (30) days of action by the COCA, with a thorough explanation, consistent with its accreditation standards, of why it may have elected to grant initial Pre-accreditation, Provisional accreditation, or Accreditation of a COM during a period in which the parent educational institution of a COM:

- Has had its recognition status placed on probation or an equivalent by a recognized **institutional accrediting agency**; or
- Has had its recognition status denied or revoked by a recognized **institutional accrediting agency**; or
- Has had its legal authority to provide postsecondary education suspended, revoked, or terminated.

The COCA will promptly review the Pre-accreditation, Provisional accreditation, or Accreditation status of a COM when a recognized institutional agency takes an **adverse action** with respect to the parent body for a COM, or places that institution on public probation.

The COCA may review the Pre-accreditation, Provisional accreditation, or Accreditation status of a COM when a recognized programmatic accrediting agency takes an **adverse action** for reasons associated with the overall institution, rather than the specific program.

Title IV

The COM and, where applicable, its parent institution will document performance of its students and graduates relative to Title IV default rates based on the most recent data provided by the Secretary of the USDE. The COM and, where applicable, its parent institution must document compliance with all necessary responsibilities under Title IV of the 1965 Higher Education Act as most recently amended, and the resulting regulations issued by the Secretary at 34 CFR Part 602, 34 CFR 667, and 34 CFR 668 and other enabling regulations.

Teach-Out Plans and Agreements

Conditions That Require Approval of a Teach-out Plan

The COCA requires a COM for which it is the institutional accreditor and has granted provisional accreditation or accreditation to submit a **teach-out plan** to the COCA for approval upon the occurrence of any of the following events:

- The Secretary of Education notifies the COCA that the Secretary has initiated an emergency action against an institution, in accordance with section 487(c)(1)(G) of the **HEA**, or an action to limit, suspend or terminate an institution participating in any title IV, **HEA** program, in accordance with section 487(c)(1)(F) of the **HEA**, and that a teach-out plan is required;
- The COCA acts to withdraw, terminate, or suspend the provisional accreditation or accreditation of the COM;
- The COM notifies the COCA that it intends to cease operations entirely or close a location that provides one hundred percent of at least one program;
- A state licensing or authorizing agency notifies the COCA that an institution's license or legal authorization to provide an educational program has been or will be revoked.

Evaluation of a Teach-Out Plan

The COCA will evaluate the **teach-out plan** to ensure that it provides for equitable treatment of students under the criteria listed below for **teach-out agreements**. The plan must specify what additional charges, if any, will need to be paid by the students, and will provide notification to the students of those charges.

If the COCA approves a **teach-out plan** that includes a program that is also accredited by another recognized accrediting agency, then the COCA must notify that accrediting agency of its approval. The COCA may require a COM to which it has granted Provisional accreditation or Accreditation to enter into a **teach-out agreement** as part of its teach-out plan.

Evaluation of Teach-out Agreements

The COCA will only approve teach-out agreements that are between COCA-accredited COMs. A COM may enter into a teach-out agreement with another institution provided that:

1. The agreement is submitted to the COCA, at least one hundred twenty (120) days prior to the beginning of transfer of students under the agreement, for its review and approval;

2. The agreement is consistent with the accreditation standards and procedures;

3. The agreement will provide that students will receive all of the instruction promised by the closed institution but not provided because of the closure;

4. The COCA will review the **teach-out plan** to ensure that it provides for equitable treatment of all students. In assessing whether the plan provides for such equitable treatment, the COCA will consider the following factors:

   - All correspondence to students regarding the closing of the COM will be given to all students at the same time;
   - All students from the closed program will be notified of all potential receiving

COMs;

- In general, such instruction will be provided without additional costs and tuition charges to the student. If the program determines that additional charges are needed, the plan will specify those charges and the basis for them and such additional charges will be directly related to the cost of instruction;
- All students are specifically notified, in writing, of any additional costs and tuition charges for each of the potential receiving COMs; and
- Any additional costs and tuition charges for a receiving COM will be the same for all students who transfer to that COM;

5. The recipient teach-out institution will demonstrate that it has the necessary experience, resources, and support services to provide an educational program that is of acceptable quality and is reasonably similar in its content, structure, and scheduling to that of the institution that is ceasing operations either entirely or at one of its locations;

6. The recipient teach-out institution will demonstrate that, during the period of the teach-out agreement, it will remain stable, carry out its mission, and meet all obligations to its existing students.

7. The closed institution will strive to provide for student placement in geographic proximity to the closed institution;

8. The recipient institution COM (s), in order to take additional students from the closed institution, must request an increase in class size through the substantive change process.

Closed Institutions Without Plan or Agreement

In the event that a COM having any accreditation status from the COCA closes without a teach-out plan or agreement, the COCA will work with the USDE and the appropriate state agency, to the extent feasible, to assist students in finding reasonable opportunities to complete their education without additional charges.

Substantive Change

General Information

The COCA will maintain complete and accurate records of all decisions made regarding requests for substantive changes, including the correspondence that is significantly related to those decisions. The COCA will not grant "pre-approval" of **Additional Locations** or **Branch Campus**es as described in 34 CFR 602. If a COM wishes to implement a Substantive Change, the COM must receive prior approval from the COCA 120 days before the implementation of the Substantive Change.

Substantive Changes that the COCA will review are:

1. Any change in the established mission or objectives or location of the institution;
2. Any change in the legal status or form of control of the institution;
3. Addition of instruction which represents a significant departure, in terms of curriculum content or method of delivery, from the curriculum as offered at the last on-site evaluation of the COM;

4. A change from clock hours to **credit hours** or vice versa;
5. A substantial increase in the number of clock hours awarded for completion of the curriculum;
6. A substantial increase or decrease in the length of the curriculum;
7. Establishment of an **Additional Location** geographically apart from the main campus, including a **Branch Campus**;
8. Contracting with a non-Title IV certified institution for greater than 25% of a program;
9. Acquisition of any other institution or any program or location of another institution;
10. Addition of a permanent location at which a teach-out is being conducted for students of another institution that has ceased operations; and
11. Any anticipated increase in class size.

Mergers between a COM and another entity will be reviewed as a Substantive Change in Governance.

Initial requests for a Substantive Change and the supporting materials should be submitted to: Secretary, COCA; American Osteopathic Association; 142 E. Ontario St.; Chicago, IL 60611 or via email to predoc@osteopathic.org.

Table 6a: Substantive Change Submission Guidelines

Substantive Change	Minimum Notification Timeline/# of days/months[1]	Minimum Materials Submission/# of days[1]	Suggested COCA Review[2]
Mission or Objectives of Institution	60 days	30 days	Two (2) COCA meetings prior to implementation
Change in Location of Institution	60 days	30 days	Two (2) COCA meetings prior to implementation
Change in Legal Status/Ownership	60 days	30 days	Two (2) COCA meetings prior to implementation
Curriculum	60 days	30 days	The August/September or December COCA meeting prior to implementation of new curriculum in the following academic year.
Hour Calculations	60 days	30 days	Two (2) COCA meetings prior to implementation
Curriculum Length	60 days	30 days	Two (2) COCA meetings prior to implementation

1 Prior to the scheduled COCA meeting that COM wants Substantive Change to be reviewed.
2 All Substantive Changes require at least 120 days prior approval from the COCA prior to implementation.

Additional Locations	18 months	90 days	A scheduled COCA meeting approximately 15 months prior to offering instruction at the location/at least 6 months prior to projected date to admit students.
Class Size Increase	60 days	30 days	The August/September or December COCA meeting prior to intended class matriculation in the following academic year.
Contracting with non-Title IV institution to deliver < 25% of COMs education program	18 months	90 days	A scheduled COCA meeting approximately 15 months prior to offering instruction at the location/at least 6 months prior to projected date to admit students.
Branch Campus	18 months	90 days	A scheduled COCA meeting approximately 15 months prior to offering instruction at the branch/at least 6 months prior to projected date to admit students.

Substantive Change Review

The COCA must be notified by the COM, at least sixty (60) days prior to the next regularly scheduled COCA meeting of all substantive change requests, which the COM wishes to have reviewed at the next regularly scheduled meeting. The COM must submit to the COCA all material that supports their substantive change request at least thirty (30) days prior to the next regularly scheduled meeting. Documentation required for the substantive change submission is listed under each substantive change category in the information that follows.

Substantive Changes Requiring Comprehensive Evaluation

The COCA may require that the requests for Substantive Change be evaluated with a comprehensive evaluation, in addition to the evaluation requirements that exist for that type of substantive change, whenever the COM meets one or more of the following conditions:

1. Had its last Comprehensive visit four (4) or more years ago;
2. Has received an accreditation status that included “with warning” or “with probation” within the last (5) years;
3. Had an approved Substantive Change-Class Size Increase within five (5) years;
4. Had an approved Substantive Change-Unplanned Class Size Increase within five (5) years;
5. Had an approved Substantive Change-**Branch Campus** within five (5) years; and
6. Had an approved Substantive Change-**Additional Location** within five (5) years.

The COCA may grant a new 7-year cycle of review of continuing Accreditation to a COM which undergoes a Comprehensive on-site visit for purposes of evaluating a request for Substantive Change.

Change in Educational Mission or Objectives of the Institution

Any COM that changes its established educational mission or objectives must provide documentation that describes:

1. The rationale for the change;
2. The effect this change will have on learning outcome assessments, facilities, faculty, admission policies and procedures, and the curriculum;
3. **Governing body** review and approval; and
4. Announcement of the proposed change to students, faculty, staff, alumni, and the public.

Monitoring

The COCA will require a Progress Report in Year 2 and Year 4 of the change in the educational mission or objectives. That Progress Report must address:

1. The linkage of its learning outcome assessments to its new mission plans and objectives (Standard 1.3);
2. Any changes to facilities as a result of the changes in the educational mission or objectives (Standard 3.1);
3. Any changes to faculty as a result of the changes in the educational mission or objectives (Standard 4.1);
4. Any changes to the admission policies and procedures as a result of the changes in the educational mission or objectives (Standard 5.1); and
5. Any changes to the curriculum as a result of the changes in the educational mission or objectives (Standard 6.1).

Change in the Location of the Institution

COMs that change their location must provide documentation that describes:

1. Appropriate charters, licenses, or approvals required to function if location is moved to a new jurisdiction;
2. The new facilities including a building and/or remodeling plans, project budget, and completion timelines;
3. Budget for move and other related expenses; and
4. **Governing body** discussion and approval.

Monitoring

The COCA will direct an on-site visit as soon as practicable, but within six (6) months for a substantive change involving a location change.

Another on-site visit will be conducted in Year 2 of the move to review:

1. Adequate COM financial resources (Standard 2.3);
2. Adequate COM facilities (Standards 3.1, 3.1.1, 3.2, 3.3); and
3. Adequacy of faculty (Standard 4.1).

Change in Legal Status or Form of Control or Ownership of the Institution

Changes in an institution's legal status or form of control or ownership must provide documentation that describes:

1. **Governing body** decisions and approval;
2. New or amended Articles of Incorporation;

3. New or revised **governing body** bylaws;
4. New or revised organizational chart;
5. Announcement of the proposed changes to students, faculty, staff, alumni, the public.

Monitoring

The COCA will direct an on-site visit as soon as practicable, but within six (6) months. That on-site visit will review the following:

1. **Governing body** bylaws and/or policies and procedures (Standards 2.1, 2.1.2, and 2.1.3)
2. Organization of **governing body** and its relationship to COM administration and academic officers (Standard 2.1.1)

Change in Curriculum

COMs that request **curriculum changes**, which represent a significant departure in terms of curriculum content or method of delivery, from the curriculum offered at the last on-site visit must provide documentation that describes:

1. The curriculum change;
2. Analysis of additional resources—financial, facilities, and faculty—needed for the curriculum change;
3. Curriculum Committee discussion and approval;
4. Faculty governance discussion and approval; and
5. **Governing body** discussion and approval.

Monitoring

The COCA will require a Progress Report for four years, beginning in the year after the first year of the curriculum change. The Progress Report must address:

1. Analysis of changes--positive and/or negative--that resulted from the curriculum change;
2. Analysis of additional resources—financial, facilities, and faculty—needed for this change (Standards 2.3, 3.1, 3.1.1, 3.2, 3.3, 4.1, and 4.1.1);
3. Student achievement data relating to the curriculum change.

Change in Hour Calculations

A COM requesting to change clock hours to **credit hours** or vice versa must provide a detailed description as to why the COM is making the change.

Monitoring

If approved, the COCA will not request further monitoring.

Increase or Decrease in Curriculum Length

A COM requesting to increase or decrease their curriculum must provide the following documentation that describes:

1. How the curriculum will be increased or decreased;
2. Analysis of additional resources—financial, facilities, and faculty—needed for increasing or

decreasing the curriculum length;
3. Curriculum Committee discussion and approval;
4. Faculty governance discussion and approval; and
5. **Governing body** discussion and approval.

Monitoring

The COCA will require a Progress Report for four years of the curriculum change, beginning in the year after the first year of the curriculum increase or decrease. The Progress Report must address:

1. Analysis of changes--positive and/or negative--that resulted from the increase or decrease in curriculum length;
2. Analysis of additional resources—financial, facilities, and faculty—needed for this change (Standards 2.3, 3.1, 3.1.1, 3.2, 3.3, 4.1, and 4.1.1);
3. Student achievement data relating the increase or decrease in curriculum length.

Additional Locations

An **Additional Location** is geographically apart from the main campus, and offers at least 50 percent of an educational program. The **Additional Location** will not have separate administration, faculty, or budgetary independence, all of which are required for a **Branch Campus** or for a new COM. Students may be admitted directly to the **Additional Location** as their primary place of enrollment. Students from the entire program can take classes at the **Additional Location**.

A COM must submit written notification to the COCA of its intention to establish an **Additional Location** at least eighteen (18) months prior to the desired date of offering instruction. The COM must also address the feasibility of establishing the **Additional Location**. This Feasibility Study must be received ninety (90) days in advance of the COCA meeting at which it will be considered and address at least the following items:

1. If the COM, or its parent, has accreditation from a regional agency recognized for that purpose by the U.S. Secretary of Education, then a letter indicating approval of the **Additional Location** from the regional accreditor must accompany the substantive change request.

2. A COM, and/or its parent, must not have accreditation with warning, accreditation with probation, or be subject to a **show cause** determination that could alter accreditation status issued by the COCA or the regional accreditor prior to requesting the substantive change for an **Additional Location**.

3. Assessment of the degree of support that the **Additional Location** has in the community, county and state, and the respective osteopathic professional associations. Written documentation must accompany this assessment. The assessment must include a letter of comment from the state osteopathic association for each state in which the proposed **Additional Location** intends to have clinical training sites.

4. A statement of the curriculum proposed to be offered at the **Additional Location** and the COM's previous experience with that curriculum.

5. Demonstrate and document with written verification that it has the availability of adequate clinical training sites. Documentation must include an assessment of the impact of the

Additional Location's proposed clinical training programs upon any osteopathic training programs already in existence at the clinical sites under discussion.

6. A GME feasibility report (incorporating the retrospective GME Accountability Report outcome metrics of Standard 8.3) that demonstrates the expected placement of the COM's current and prospective graduates in GME positions, including OGME positions. In addition, the COM must demonstrate educational planning and noted progress in generating postdoctoral training opportunities.* An EXCEL® workbook for current and projected Clinical Rotations and GME development will be sent to all COMs requesting approval of an **Additional Location.** COCA staff will send the workbook and information to complete the workbook after the request for **Additional Location** has been received. COCA Staff will also assist the COM in the workbook completion.

   *A COM must demonstrate the feasibility of success for GME placement of its students in order to be approved for the substantive change.

7. The parent must provide for student services for the **Additional Location** as required by Standard Five: Students.
8. Identify the faculty who will provide instruction.
9. Projected revenues, expenditures, and cash flows at the **Additional Location**.
10. Operation, management, and physical resources at the **Additional Location**, including learning resources.

<u>COMs Seeking Additional Locations with Hosting Partners</u>

COMs and hosting partners, who are themselves, academic institutions, hospitals, or healthcare systems, require a Memorandum of Understanding (MOU) or legally binding contract that addresses at least the following elements:

These statements must be included at the time a new COM is submitting a request for substantive change:

1. A statement of how the proposed additional location would fit within the COM's mission.
2. A statement of why the COM wishes to enter into an agreement with the "host" institution.
3. A statement that identifies the authority and status of the "host" institution.
4. A statement of contractual agreement and legal obligation that includes:
   a. Fiscal, fiduciary, and marketing relationship;
   b. The rights retained by the COM;
   c. The duties of the COM to the "host" institution;
   d. The rights retained by the "host" institution;
   e. The branding by the COM alone, and any co-branding with the host institution;
   f. Specification of the services being provided by each entity to the other;
   g. Specification of who is the final authority on the curriculum for the COM and the requirements for granting the D.O. degree;
   h. Specification on who awards the D.O degree;
   i. Specification on who is the final authority on the selection of COM students;
   j. Specification on who is the final authority on selection of COM faculty members;
   k. A statement of the term of the agreement;
   l. A statement on how the agreement may be amended;

m. A statement on how either party may withdraw from the agreement;
n. A statement that explains whether the MOU reflects the complete agreement between the parties of should be interpreted in light of other agreements between the parties;
o. A statement that the COM recognizes it is responsible for meeting the COCA standards;
p. A statement where the COM recognizes it is responsible for handling COCA complaints;
q. Information, as requested by COCA concerning the "host's" finances and accreditation status;
r. Verification that students are aware of financial responsibility and student rights in regards to Title IV;
s. Verification that students are aware that financial aid is no processed through the "host" institution and they are not eligible to participate in Title IV through the "host" institution;
t. A lease agreement must be a minimum of 10 years in length with at least five (5) year notice of termination.
u. A minimum period of three (3) years is required for cancellation of any services affecting students.
v. Upon notice of termination of a lease, a teach-out plan must be submitted to the COCA or the school must be able to immediately demonstrate a new location or lease to be approved by the COCA.

<u>Monitoring</u>

- An on-site Focused Visitation will be conducted six months prior to beginning operations, including admitting students and beginning instruction to review the following selected standards addressing: finances; administrative team; facilities; faculty; student services, curriculum and GME.
  - Standards 2.3, 2.7;
  - Standard Three (all);
  - Standards 4.1, 4.1.1, 4.2, 4.2.1, 4.2.2, 4.2.3, 4.2.4;
  - Standard Five (all);
  - Standard Six (all)
  - Standards 8.1, 8.2 and 8.3

- An on-site Focused Visitation will be conducted within six months of operations to determine that financial, faculty, and facility resources are appropriate for the **Additional Location**. This visit will review the following standards:
  - Standard 2.3;
  - Standard Three (all);
  - Standards 4.1, 4.1.1, 4.2, 4.2.1, 4.2.2, 4.2.3, 4.2.4;
  - Standard Five (all);
  - Standard Six (all);
  - Standards 8.1, 8.2 and 8.3.

- The COCA will include the **Additional Location**(s) in the parent institution's accreditation only after verifying that the COM meets all accreditation standards.

- After the on-site visit within six (6) months of operation, the **Additional Location**(s) will undergo a Focused Visitation in Year 3 to review compliance with standards for clinical education and educational planning (*Clerkship Training in standard domain Six)*. If the next Comprehensive evaluation of the parent would occur prior to Year 3 of operation, then this Year 3 evaluation will occur within that Comprehensive evaluation. Thereafter, on-site evaluations of the **Additional Location** will occur in conjunction with the on-site visit of the parent campus.

Accreditation Status

1. The parent's Accreditation status will be extended to the **Additional Location**(s) only after a site visit and the acceptance of the site visit report by the COCA.
2. The **Additional Location**(s) cannot recruit students or begin operations, including offering instruction, until after the first on-site visit and approval by the COCA.

Class Size Increases (Unplanned and Planned)

All COMs have an approved class size from the COCA. Each **Branch Campus** and **Additional Location** that is recognized by the COCA will also have a separate, approved class size from the COCA. COMs may matriculate up to and including a number of students that is equal to 1.08 times the approved class size.

Each class size increase request, or request for approval of a one-time class size increase, or an unplanned increase must be reviewed by the COCA on a case-by-case basis. Documentation to be submitted by the COM for this review must include, but is not limited to the:

1. Adequacy of faculty and how that was calculated;
2. Sufficient classroom and laboratory space, such as auditoriums, anatomy, and Osteopathic Manipulative Medicine;
3. Sufficient library space;
4. Sufficient number of Year 3 and Year 4 rotation slots;
5. A GME feasibility report (incorporating the retrospective GME Accountability Report outcome metrics of Standard 8.3) that demonstrates the expected placement of the COM's current and prospective graduates in GME positions, including OGME positions. In addition, the COM must demonstrate educational planning and noted progress in generating postdoctoral training opportunities.* An EXCEL® workbook for current and projected Clinical Rotations and GME development will be sent to all COMs requesting approval of an **Class Size Increase.** COCA staff will send the workbook and information to complete the workbook after the request for **Class Size Increase** has been received. COCA Staff will also assist the COM in the workbook completion.

   *A COM must demonstrate the feasibility of success for GME placement of its students in order to be approved for the substantive change.

For the purpose of an accurate accounting of class size, in those instances where a student matriculates in one (1) year but takes a leave of absence or other decelerated program options, the COM will count that student towards the class in which he/she matriculated. Student admissions will be limited to the COCA approved class size with a permitted variance of eight percent (8%) of the approved class size.

Monitoring

Unplanned Class Size Increase -- All COMs with an unplanned class size increase in excess of the permitted variance (8%) will be required to submit Progress Reports annually for Years 1, 2, 3, and 4. At minimum, Focused Visitations will be conducted in Years 1 and 3. The Focused Visitation for Year 1 of operation and Progress Report for Year 2 will address Standards 2.3, 3.1, 3.1.1, 3.2, 3.3, 4.1, 4.1.1, and 4.1.2. The Progress Reports for Years 3 and 4 will address standards for clinical education and educational planning (*Clerkship Training* in standard domain Six) and Standards 8.1, 8.2 and 8.3. The Year 3 Progress Report will be due sixty (60) days prior to the Year 3 Focused Visitation and will only be utilized by the site visit team and not reviewed by the COCA.

Any COM with a matriculation in excess of eight percent (8%) over their approved class size will not be allowed to request a class size increase for three (3) years in order to permit the COCA to follow the academic achievement of this class cohort throughout its remaining years to receipt of the first professional degree.

The COCA will have the right to review the accreditation status of any institution which exceeds its class size using progressive measures as follows:

- A request for additional written information to explain the deficiency;
- A request to **show cause** as to why a COM is not out of compliance;
- A request for COM representation to appear before the COCA;
- A focused visitation as directed;
- Or a reduction in approved class size as directed by the COCA.

Based upon the findings of its review, the COCA may implement appropriate remedial measures affecting the accreditation of the COM, including reduction or withdrawal of the COM's accreditation.

Planned Class Size Increase -- For planned class size increases, Focused Visitations will be conducted in Years 1 and 3 of implementation and Progress Reports will be required for Years 2, 3, and 4. The Focused Visitation for Year 1 of operation and the Progress Report for Year 2 will address Standards 2.3, 3.1, 3.1.1, 3.2, 3.3, 4.1, 4.1.1, and 4.1.2. The Focused Visitation in Year 3 and the Progress Reports for Years 3 and 4 will address standards for clinical education and educational planning (*Clerkship Training* in standard domain Six) and Standards 8.1, 8.2 and 8.3. The Year 3 Progress Report will be due sixty (60) days prior to the Year 3 Focused Visitation and will only be utilized by the site visit team and not reviewed by the COCA.

Contracting with a non-Title IV certified institution to provide greater than 25% of a COM's educational program

A COM that seeks to enter into a contract under which an institution or organization not certified to participate in Title IV, **HEA** programs offers more than 25 percent (25%) of the COM's program must submit written notification to the COCA of its intention to establish such a partnership at least (18) months prior to the desired date of offering instruction at the partner's facilities.

The criteria for evaluation and monitoring are those as established for Substantive Change–Curriculum and Substantive Change–**Additional Location**, depending on the nature of the agreement.

1. If the instruction will occur at the COM, then this will be reviewed as a Substantive Change–Curriculum.
2. If the instruction will occur at a different geographic location from the COM, and represents 25-49% of the program offering, then this will be reviewed as a Substantive Change–Curriculum.
3. If the instruction will occur at a different geographic location from the COM, and represents 50% or more of the program offering, then this will be reviewed as a Substantive Change–**Additional Location**.

Acquisition of any other institution or any program or location of another institution

A COM that seeks to acquire another COM or merge with another COM must submit written notification to the COCA of its intention to establish such an acquisition at least (18) months prior to the desired date of offering instruction at the acquired programs.

The criteria for evaluation and monitoring are those as established for Substantive Change–Governance and Substantive Change–**Additional Location**/Substantive Change–**Branch Campus** depending on the COCA's accreditation role and the nature of the agreement.

1. If two COMs intend to merge and create a new legal entity, then this will be reviewed as a Substantive Change–Governance. Depending on the nature of the new legal entity, the COCA may direct a Comprehensive on-site evaluation of all accreditation standards or some portion thereof in addition to those normally reviewed in a Substantive Change–Governance.
2. If two COMs intend to merge in a manner that one of the COMs remains the surviving entity, and has institutional accreditation from the COCA, then this will be reviewed as a Substantive Change–**Branch Campus** or **Additional Location**, depending on how the surviving COM intends to operate the acquired COM.
3. If two COMs intend to merge in a manner that one of the COMs remains the surviving entity, and has programmatic accreditation from the COCA, then this will be reviewed as a Substantive Change–**Additional Location**.

Addition of a permanent location at which a teach-out is being conducted for students of another institution that has ceased operations

A COM that seeks to add a permanent location at a site at which the institution is conducting a teach-out for students of another COM that has ceased operations before all its students have completed their program of study must submit written notification to the COCA of its intention to establish such an acquisition at least (18) months prior to the desired date of adding the permanent location.

NOTE: the criteria for review of a teach-out agreement *per se*, are found in the section on review of teach-out agreements.

The criteria for evaluation and monitoring are those as established for Substantive Change–Governance and Substantive Change–**Additional Location**/Substantive Change–**Branch Campus** depending on the COCA's accreditation role and the nature of the agreement.

1. If the COM that remains the surviving entity has institutional accreditation from the COCA, then this will be reviewed as a Substantive Change–**Branch Campus** or **Additional Location**, depending on how the surviving COM intends to operate the acquired COM.

2. If the COM that remains the surviving entity has programmatic accreditation from the COCA, then this will be reviewed as a Substantive Change –**Additional Location**.

Branch Campus

Only a free-standing COM having accreditation status from the COCA as its institutional accreditor will have the option of offering instruction at a **Branch Campus** owned or operated by the COM.

A COM must submit written notification to the COCA of its intention to establish a **Branch Campus** at least eighteen (18) months prior to the desired date of offering instruction. The COM must also address the feasibility of establishing the **Branch Campus**. This Feasibility Study must be received ninety (90) days in advance of the COCA meeting at which it will be considered and address at least the following items:

1. The appropriate state agency, a charter, or evidence of support for approval to grant the Doctor of Osteopathy (DO) or Doctor of Osteopathic Medicine (DO) degree;
2. Assessment of the degree of support that the **Branch Campus** has in the community, county and state, and the respective osteopathic professional associations. Written documentation must accompany this assessment. The assessment must include a letter of comment from the state osteopathic association for each state in which the proposed **Branch Campus** intends to have clinical training sites;
3. Demonstrate and document with written verification that it has the availability of adequate clinical training sites. Documentation must include an assessment of the impact of the **Branch Campus**' proposed clinical training programs upon any osteopathic training programs already in existence at the clinical sites under discussion;
4. The curriculum to be offered at the **Branch Campus**;
5. The faculty who will provide instruction;
6. Projected revenues, expenditures, and cash flows at the **Branch Campus**;
7. Physical resources at the **Branch Campus;**
8. Administrative structure of the **Branch Campus**, including the identification of the individual who will be the on-site chief academic officer;
9. Organizational structure between the parent and the **Branch Campus** must be described and documented in an organizational chart; and

10. A GME feasibility report (incorporating the retrospective GME Accountability Report outcome metrics of Standard 8.3) that demonstrates the expected placement of the COM's current and prospective graduates in GME positions, including OGME positions. In addition, the COM must demonstrate educational planning and noted progress in generating postdoctoral training opportunities.* An EXCEL® workbook for current and projected Clinical Rotations and GME development will be sent to all COMs requesting approval of an Branch Campus. COCA staff will send the workbook and information to complete the workbook after the request for Branch Campus has been received. COCA Staff will also assist the COM in the workbook completion.

    *A COM must demonstrate the feasibility of success for GME placement of its students in order to be approved for the substantive change.

<u>COMs Seeking Branch Campuses with Hosting Partners</u>

COMs and hosting partners, who are themselves, academic institutions, hospitals, or healthcare systems, require a Memorandum of Understanding (MOU) or legally binding contract that addresses at least the following elements:

These statements must be included at the time a new COM is submitting a request for substantive change:

1. A statement of how the proposed branch campus would fit within the COM's mission
2. A statement of why the COM wishes to enter into an agreement with the "host" institution.
3. A statement that identifies the authority and status of the "host" institution.
4. A statement of contractual agreement and legal obligation that includes:
    a. Fiscal, fiduciary, and marketing relationship;
    b. The rights retained by the COM;
    c. The duties of the COM to the "host" institution;
    d. The rights retained by the "host" institution;
    e. The branding by the COM alone, and any co-branding with the host institution;
    f. Specification of the services being provided by each entity to the other;
    g. Specification of who is the final authority on the curriculum for the COM and the requirements for granting the D.O. degree;
    h. Specification on who awards the D.O degree;
    i. Specification on who is the final authority on the selection of COM students;
    j. Specification on who is the final authority on selection of COM faculty members;
    k. A statement of the term of the agreement;
    l. A statement on how the agreement may be amended;
    m. A statement on how either party may withdraw from the agreement;
    n. A statement that explains whether the MOU reflects the complete agreement between the parties of should be interpreted in light of other agreements between the parties;
    o. A statement that the COM recognizes it is responsible for meeting the COCA standards;
    p. A statement where the COM recognizes it is responsible for handling COCA complaints;
    q. Information, as requested by COCA concerning the "host's" finances and accreditation status;

r. Verification that students are aware of financial responsibility and student rights in regards to Title IV;
s. Verification that students are aware that financial aid is no processed through the "host" institution and they are not eligible to participate in Title IV through the "host" institution;
t. A lease agreement must be a minimum of 10 years in length with at least five (5) year notice of termination.
u. A minimum period of three (3) years is required for cancellation of any services affecting students.
v. Upon notice of termination of a lease, a teach-out plan must be submitted to the COCA or the school must be able to immediately demonstrate a new location or lease to be approved by the COCA.

Monitoring

The **Branch Campus** offering a program in osteopathic medicine must have that program conform to the same standards for faculty, staff, facilities, student services, curriculum, and research in order to meet the COCA accreditation standards for a COM.

1. The COCA will conduct a Comprehensive on-site visit to a **Branch Campus** at least six (6) months prior to the initiation of instruction and acceptance of students at the **Branch Campus** to ensure compliance with all of the accreditation standards.
2. Comprehensive on-site visits will be conducted in Years 1 and 2 of operation to review all standards.
3. The COCA will include the **Branch Campus**(s) in the parent institution's accreditation only after verifying that the COM meets all accreditation standards.
4. Focused Visitations will be conducted in Years 3 and 4 of operation to review standards addressing clinical education (*Clerkship Training* in standard domain Six) and Standard 8.1, 8.2 and 8.3. Thereafter, on-site evaluations of the **Branch Campus** will be scheduled in conjunction with the on-site visit of the parent campus.

Accreditation Status

The COCA will include a **Branch Campus** in the parent institution's accreditation only after verifying that the COM meets all accreditation standards. After the initial on-site visits to monitor and evaluate the application, a **Branch Campus** will undergo on-site visits scheduled in conjunction with on-site visits of the parent campus.

The **Branch Campus** may recruit, but not accept students or offer instruction, after the first review and approval of its application. Operations at the **Branch Campus**, including enrolling students and offering instruction, may begin after COCA review of the initial site visit report and granting of such approval. See Table Two: Timetable for the **Branch Campus** application.

Table 6b: Substantive Change – Monitoring

Substantive Change	Standards Reviewed for Monitoring
Educational Mission or Objectives of Institution	**Years 2 and 4- Progress Report** addressing Standards 1.3; 3.1, 4.1, 5.1, and 6.1
Change in Location of Institution	**6 months of operation and Year 2-Focused Visitation** addressing Standards 2.3, 3.1, 3.1.1, 3.2, 3.3, and 4.1
Change in Legal Status or Form of Control or Ownership	**Within 6 months of change-Focused Visitation** addressing Standards 2.1, 2.1.1, 2.1.2, and 2.1.3
Change in Curriculum	**Progress Reports for 4 years** beginning the year after the first year of the curriculum change addressing Standards 2.3; 3.1, 3.1.1, 3.2, 3.3, 4.1, and 4.1.1, as well as other criteria noted in the body of Chapter VI
Change in Curriculum Length	**Progress Report for 4 years** beginning the year after the first year of the curriculum change addressing Standards 2.3, 3.1, 3.1.1, 3.2, 3.3, 4.1 and 4.1.1, as well as other criteria noted in the body of Chapter VI
Additional Location	**6 months prior to operation <u>and</u> 6 months after operation has begun-Focused Visitations** addressing Standards 2.3, 2.7 (2.7-**<u>prior</u>** only); Standard Three (all); Standards 4.1, 4.1.1, 4.2, 4.2.1, 4.2.2, 4.2.3, 4.2.4; Standard Five (all); Standard Six (all); and Standards 8.1, 8.2 and 8.3. **Year 3-Focused Visitation** addressing clinical education standards (*Clerkship Training* in standard domain Six) and Standards 8.1, 8.2 and 8.3.
Class Size Increase (Unplanned)	**Year 1-Focused Visitation <u>and</u> Progress Report** addressing Standards 2.3, 3.1, 3.1.1, 3.2, 3.3, 4.1, 4.1.1, and 4.1.2 **Year 2 Progress Report** on same standards. **Years 3-Focused Visitation and Years 3 & 4-Progress Reports** each addressing clinical education standards (*Clerkship Training* in standard domain Six) and Standards 8.1, 8.2 and 8.3.
Class Size Increase (Planned)	**Year 1 Focused Visitation and Year 2 Progress Report** addressing Standards 2.3, 3.1, 3.1.1, 3.2, 3.3, 4.1, 4.1.1, and 4.1.2 **Year 3-Focused Visitation and Years 3 & 4-Progress Reports** addressing clinical education standards (*Clerkship Training* in standard domain Six) and Standards 8.1, 8.2 and 8.3.

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Table 6b: Substantive Change – Monitoring (continued)

Substantive Change	Standards Reviewed for Monitoring
Contracting with non-Title IV institution to deliver ≥ 25% of COM's education program	Same as either Change in Curriculum or **Additional Location** depending upon criteria noted in Chapter VI.
Branch Campus	**A comprehensive visit will be conducted 6 months prior to operations** to review all standards. **Years 1& 2-Comprehensive Site Visit** to review all standards **Years 3 & 4-Focused Visitation** addressing clinical education standards (*Clerkship Training* in standard domain Six) and Standards 8.1, 8.2 and 8.3.

Not all Substantive Changes are included in this table. Please find additional information in the body of Chapter VI.

CHAPTER VII: IN THE PUBLIC INTEREST

Public Information about the COCA

The COCA maintains a website – http://www.aoacoca.org – as its principal source of information about its accreditation program. Examples of the types of information that will be found include, but are not limited to, the following:

- the types of recognition granted by the COCA;
- the application procedures that are used for seeking recognition from the COCA;
- the standards and procedures for accreditation – *Accreditation of Colleges of Osteopathic Medicine: COM Accreditation Standards and Procedures*
- the COMs that currently have an accreditation recognition status from the COCA; and
- the names, academic and professional qualifications, and relevant employment and organizational affiliations of the COCA commissioners and principal administrative staff.

Third Party Comments

The COCA will receive, review, and consider any written or oral third-party comment in regard to an initial or continued request for accreditation, pre-accreditation, provisional accreditation, requests for substantive change, or requests to enter into a teach-out agreement. Persons wishing to present third party testimony at any COCA meeting must provide written notice thirty (30) days prior to the meeting to the COCA Secretary if they wish to attend. The COM will be notified of the third party presentation so that they can have an opportunity to comment. Notice of opportunity to comment will be provided with announcements of the COCA meeting on the AOA website, www.aoacoca.org.

Confidentiality of Accreditation Reports

Accreditation reports are confidential between the COCA and the COM involved. Premature and/or unauthorized disclosure of information reflecting visiting team or COCA views concerning the accreditation status of a COM is not permitted.

The administrative officers of each COM are encouraged to make accreditation reports available to faculty members and others directly concerned. Except for the information that is presented in open sessions of the COCA, members of the COCA and visiting team members are not authorized under any circumstances to disclose any information obtained during on-site visits.

With the exception of the reporting required by the Secretary of the USDE, it is the obligation of the COCA to maintain the confidentiality of its relationships with its COMs and not to announce publicly any action with respect to a COM other than its accreditation status, including public probationary status, or its removal from the accredited list.

The COM retains the right to publicize accreditation reports for the institution. If a COM releases part or all of an accreditation report in such a manner as to misrepresent or distort the report of the COCA, the COCA may release either appropriate parts of or the full report to correct the misinformation. The COCA will inform the COM in advance of the release and the substance of the release of any such information.

If the COM elects to publicly disclose its Pre-accreditation, Provisional accreditation, or Accreditation status received from the COCA, it must state the following:

The college has received Pre-accreditation, Provisional accreditation, or Accreditation status from the American Osteopathic Association's Commission on Osteopathic College Accreditation, which is the recognized accrediting agency for the approval of colleges and programs leading to the Doctor of Osteopathic Medicine (DO) degree. The address and phone number of the accrediting agency are: Secretary, COCA; Department of Accreditation; American Osteopathic Association; 142 East Ontario Street; Chicago, IL 60611; Telephone 312/202-8000; Fax 312/202-8209; email predoc@osteopathic.org.

Complaint Review Procedures

Complaint review procedures are established to protect the integrity and the maintenance of accreditation standards and procedures as they relate to approved COMs having recognition from the COCA. Complaint procedures provide a mechanism for concerned individuals or organizations to bring to the attention of the accrediting agency information concerning specific actions and programs, which may be in non-compliance with the COCA's accreditation standards. The COCA recognizes their responsibility to provide complainants the opportunity to utilize the COCA as a vehicle to deal with specific grievances as well as being a mechanism for reviewing and finally resolving complaints against the COCA or the administrative staff.

Complaints may be filed by any individual or group including, but not limited to, the following:

- An osteopathic medical student;
- An individual, organization, or institution affected by the accreditation program academically or professionally; and
- A member of the general public.

Complaint Submission about a COM

The complaint must be in writing and signed by the complainant. All signed complaints must be submitted to the Secretary, COCA; American Osteopathic Association; 142 E. Ontario St.; Chicago, IL 60611 or via email to predoc@osteopathic.org. Complaints that are received that are not signed by the complainant(s) or are submitted anonymously will not be processed.

The complainant will present a concern regarding a violation(s) of an accreditation standard or procedure that must be based upon direct and responsible information. The complainant must provide a narrative of his/her allegation, as it relates to the accreditation standards or procedures, and include any documentation that could support his/her allegation. This information must be accurate and well documented.

The complainant will provide evidence that an effort has been made to resolve the problem through the recommended route through COM administration, and will include information about all other actions initiated to resolve the problems.

Within ten (10) business days of receipt of a signed complaint, copies of the complaint will be sent to the COM's **Chief Executive Officer** or **Chief Academic Officer** for response to the complaint. The COM's **Chief Executive Officer** or **Chief Academic Officer** will have fifteen (15) business days to respond. The COM's response and the complaint will be forwarded to the COCA chair who will either ask the COCA Executive Committee or appoint an *ad hoc* subcommittee to determine whether the complaint merits further investigation. An investigation will be conducted if the complaint has merit. If the COCA Executive Committee or the *ad hoc* subcommittee finds no merit in the complaint, the complainant and the COM will be notified in writing. The complainant and the COM will be notified of the outcome in writing. This process will be concluded within fifteen (15) business days.

Complaint Investigation

If an investigation is warranted, the COCA Secretary, in cooperation with AOA corporate counsel, and the COCA Executive Committee or the *ad hoc* subcommittee will initiate a formal review within thirty (30) days from the decision to initiate an investigation. The *ad hoc* subcommittee will decide what particular method of study and mode of investigation is most appropriate for the complaint that has been received, which may include an on-site visit.

The COCA Executive Committee or the *ad hoc* subcommittee's findings will be forwarded to the COCA. Based upon these findings, the COCA may take either of the following actions:

- Dismiss the complaint and report that the COM is in compliance with the accreditation standards; or
- Notify the COM in question that, on the basis of an investigation, the COCA has determined that the COM is failing to meet the accreditation standards.

If the COM has been found to be out of compliance with the accreditation standards, the COCA may determine one of the following methods of review:

- A report outlining the COM's plans to address the deficiencies outlined by the COCA; and/or
- A Progress Report documenting the COM's planning and its implementation of the plans; or
- An on-site visit may be recommended to determine whether a change in the accreditation status of the COM is warranted.

These procedures should be completed and the COM notified within fifteen (15) days of the COCA decision. Any such accreditation decision or action of the COCA will be subject to the reconsideration and appeal procedures set forth in these procedures.

Investigation and Resolution of a Complaint Against the COCA or Administrative Staff

The complaint must be in writing and signed by the complainant. All signed complaints must be submitted to the Secretary, COCA; American Osteopathic Association; 142 E. Ontario St.; Chicago, IL 60611 or via email to predoc@osteopathic.org.

The COCA Secretary will present the complaint, in conjunction with AOA corporate counsel, to the COCA chair, vice-chair, and, when applicable, to affected staff members. A subcommittee of the COCA will be appointed by the COCA chair to formally review the complaint and develop a response to the complaint. This subcommittee review process and response will be completed and forwarded to the COCA within thirty (30) days of the date the subcommittee is convened.

The COCA will consider the complaint and the response at its next regularly scheduled meeting. The complainant will be invited to appear before the COCA to present respective views in order to attempt an agreed resolution. The final action of the COCA will be communicated to the complainant within fifteen (15) business days of the COCA decision.

Student Complaints

The policies and procedures for student complaints are stated in Standard 5.8 as follows:

The COM, and/or its parent institution, must publish policies and procedures regarding student complaints related to accreditation standards and procedures, and must maintain records of the receipt, adjudication, and resolution of such complaints.

Considerations of Actions from other Accrediting Bodies

The COCA will routinely share information about the pre-accreditation, provisional accreditation, or accreditation status of a COM or any **adverse action** taken against the COM with other appropriate recognized accrediting agencies and state agencies.

CHAPTER VIII: GLOSSARY

AACOM – American Association of Colleges of Osteopathic Medicine

Additional Location – A location that is geographically apart from the main campus at which the institution offers at least 50 percent of an educational program.

Adjunct Faculty – Faculty serving in a temporary or auxiliary capacity with limited duties and benefits.

Adverse Action – Adverse action is the denial of any accreditation status by the COCA. A "denial" action is initiated by the COCA.

Affiliated Clinical Site – Within criteria specified in AOA Standards and Procedures an affiliated clinical site is an accredited healthcare facility or clinic, not owned or operated by a COM, which agrees to provide specific and limited clinical instruction to a COM's students.

Anticipated change in class size – A substantive change. The COM's **governing body** typically will approve a class size increase. After the COM or its parent institution's **governing body** approves an increase in class size, the COM must submit a request for approval from the COCA. This request must follow the procedures outlined under Chapter V: Accreditation Procedures.

AOA - American Osteopathic Association

AOA Board – Board of Trustees of the AOA

COCA – Commission on Osteopathic College Accreditation of the AOA

Branch Campus – COMs that have their institutional accreditation status from the COCA. A Branch Campus is any location of an institution other than the main campus which is permanent in nature, offers courses in educational programs leading to the doctor of osteopathy or doctor of osteopathic medicine degree, has its own faculty and administrative or supervisory organization, has its own budgetary and hiring authority, and may have **affiliated clinical sites**. These will be considered a Branch Campus and must follow the procedures outlined under Chapter VI: USDE Requirements.

CHEA – Council for Higher Education Accreditation

Chief Academic Officer (CAO) -- The COCA has chosen to use the term chief academic officer instead of Dean (a/k/a full dean) when referring to the COM specifically. This definition does not preclude this individual from serving in a higher, more institution – wide capacity where a COM is organized within a parent institution.

Chief Executive Officer (CEO) – The COCA has chosen to use the term chief executive officer instead of President or Chancellor.

Chief Financial Officer (CFO) – The COCA has chosen to use this term, CFO, broadly to identify both: (a) the CFO of a free-standing, single degree program for which the COCA is an institutional accreditor; and for (b) the highest ranking financial person of a COM that is located within a larger institution and for which the COCA is a programmatic accreditor only.

COM – College (or school) of osteopathic medicine offering instruction leading to the Doctor of Osteopathy or Doctor of Osteopathic Medicine (D.O.) degree

COM Community – Includes those individuals affiliated with the COM, including students and faculty, and the public.

Commendation – A written comment in an on-site visit report that indicates a specific accreditation standard has been exceeded.

Communities of Interest – Includes osteopathic medical professionals including, students, interns, and residents, individuals who are employed in the osteopathic medical profession; and the public.

Competencies of a Chief Academic Officer –

- Recruit, select, manage, and evaluate a team of associate / assistant deans, department/discipline heads, faculty and other non-faculty administrative staff who are, themselves, appropriately experienced in higher education and/or osteopathic medical education
- Have expertise to evaluate the adequacy of the curricular model and delivery modalities of the COM
- Have the experience and skill to participate in the development of mission, vision and goals, budgets, and strategic plans for the COM.
- Have the experience to advocate for the resources needed for the development and operation of the COM and oversee their usage at the COM level.

Competencies of a Chief Executive Officer – NOTE: COCA review of the CEO will only be conducted in those COMs in which the COCA is the institutional [and programmatic] accreditor. The CEO must be able to:

- Hire, manage, and evaluate a team of qualified senior administrative and academic management and staff who are, themselves, appropriately experienced in higher education
- Have expertise to define the qualifications of the position of COM's CAO
- Obtain the financial resources needed for the development and operation of the institution and oversee their usage
- Have the experience and skill to oversee along with the Board of Directors the development of mission, vision, goals and strategic plans for the COM.

Competencies of a Chief Financial Officer -- NOTE: COCA review of the CFO will only be conducted in those COMs in which the COCA is the institutional [and programmatic] accreditor. The CFO must be able to:

- Either serve as controller for the institution, or be able to supervise the controller;
- If serving as the controller, be familiar with Generally Accepted Accounting Principles as applicable to institutions of higher education
- Manage the evaluation of accounting systems for the COM
- Advise the CEO on capital acquisition for projects requiring long-term financing, and assist in the procurement of such financing when needed.
- Advise the CEO on investment strategies for the COM.
- Understand and manage Title IV Federal Student Loan Programs

For those COMs that have the COCA as their programmatic accreditor only, the CFO responsibilities will be shared with those of the CFO for the entire institution. The CFO in the COM must have accounting experience necessary to oversee budget preparation and budget management and other related duties that may be assigned.

Competencies of a Department Chair or Equivalent --

- Recruit, manage, and evaluate a team of faculty members and non-faculty staff who are, themselves, appropriately experienced to meet the teaching, research and service needs of the unit.
- Have expertise to evaluate the adequacy of the curricular model and delivery modalities of that coursework for which the unit is responsible, and recommend changes when appropriate.
- Define the financial, physical and human resources needed for the unit to meet all of its responsibilities, develop budget recommendations for the department or division and oversee their usage.

Credit Hour – For purposes of Standard 5.4.7, a credit hour is defined by the regulations of the U.S. Secretary of Education at 34 CFR 600.2 – Except as provided in 34 CFR 668.8(k) and (l), a credit hour is an amount of work represented in intended learning outcomes and verified by evidence of student achievement that is an institutionally established equivalency that reasonably approximates not less than:

1. One hour of classroom or direct faculty instruction and a minimum of two hours of out of class student work each week for approximately fifteen weeks for one semester or trimester hour of credit, or ten to twelve weeks for one quarter hour of credit, or the equivalent amount of work over a different amount of time; or
2. At least an equivalent amount of work as required in paragraph (1) of this definition for other academic activities as established by the institution including laboratory work, internships, practica, studio work, and other academic work leading to the award of credit hours.

Curriculum Changes – A curricular substantive change. The addition of courses or programs that represent a significant departure, in either content or method of delivery, from those that were offered when the COM had their last accreditation on-site visit; the addition of courses or programs at a degree or credential level above that which is included in the COM's current accreditation status; a change from clock hours to **credit hours**; a substantial increase in the number of clock or **credit hours** awarded for successful completion of a program.

Department Chair or Equivalent in clinical disciplines - COMs are not restricted in their selection of an organizational structure that best enables them to achieve their mission. By tradition, this has been accomplished with units consisting of professionals within one recognized academic discipline and is designated as a department. Departments maintain considerable educational and administrative authority within their discipline. Other types of organization may group professionals across more than one recognized discipline, e.g. within clinical sciences, primary care medicine and specialty medicine. In such organizational structures, the faculty member who chairs/heads/directs the unit will not be responsible for all educational courses offered under that unit. In these structures, the educational "equivalent leader" for a clinical discipline may be designated as a division or section leader within a larger organizational unit. Alternatively, the educational "equivalent leader" may be defined by curriculum management responsibilities and designated as a course coordinator/director.

Distance Education – Distance Education means education that uses one or more of the technologies listed in paragraphs (1) through (4) of this definition 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. The technologies may include:

a. The internet;
b. One-way and two-way transmissions through open broadcast, closed circuit, cable, microwave, broadband lines, fiber optics, satellite, or wireless communications devices;
c. Audio conferencing; or
d. Video cassettes, DVDs, and CD-ROMs, if the cassettes, DVDs, or CD-ROMs are used in a course in conjunction with any of the technologies listed in paragraphs (1) through (3) of this definition.

Evaluator Trainee – An Evaluators Registry member who is attending an on-site visit as an active team member under the supervision of an experienced evaluator qualified in the same area of expertise.

Faculty Adequacy Model – A faculty adequacy model compares the total number of faculty hours necessary and the number of total faculty hours available to deliver the curriculum. COMs determine the number of hours available for teaching, class preparation, research, scholarly activity, committee work, advisement, clinical service, and other activities deemed critical to fulfillment of the COM mission. The distribution of hours across these activities may vary among individual faculty members. COMs which have more available hours than necessary hours are deemed to have adequate faculty.

Faculty, full-time – Each COM is required to establish and publish its own definitions of full-time faculty. However, such definitions must meet certain minimum requirements as set forth in standard Four: Faculty and in this glossary. Full-time faculty must be employed by the COM and be under contract. It is customary in full-time employment agreements to state that the individual will devote his/her complete attention and energies to the position of employment. Furthermore, it is customary for full-time faculty to normally perform their duties on-site, and contribute to two or more of the following areas: teaching, research, service. Full-time faculty who are executive, academic, or business officers of the COM may devote the majority of their efforts to administration.

Faculty, part-time – Each COM is required to establish and publish its own definitions of part-time faculty. However, such definitions must meet certain minimum requirements as set forth in Standard Four: Faculty and in this glossary. Part-time faculty must be employed by the COM and be under contract. It is customary in part-time employment agreements to state that the individual will devote such attention and energies necessary to fully perform the assigned duties of the position of employment. Furthermore, it is customary for part-time faculty to have responsibilities that are significantly less than those of full-time faculty, both with respect to scope of activities, and percentage of effort devoted to employment at the COM.

Governing body – The COCA has chosen to use this term rather than governing board, board of trustees, etc.

Guideline – These statements explain the standard intent and provide examples and/or guide COMs toward standard compliance.

HEA – The Higher Education Act of 1965 as most currently amended.

Institutional Accrediting Agency – An agency that accredits institutions of higher education; such an agency grants accreditation decisions that enable its accredited institutions to establish eligibility to participate in Higher Education Act Programs.

Interprofessional Collaborative Practice – Professionals from different disciplines working together with patients, families and communities to deliver health care.

Must – Indicates a mandatory requirement.

New Program Applicant – A new program that is not part of an existing COM must follow the procedures outlined under *Chapter II: Applicant and Accreditation Procedures*.

NBOME – National Board of Osteopathic Medical Examiners, Inc.

Observer – Represents Federal or State Agencies or organizations, which may have a legitimate accreditation responsibility to attend an on-site visit.

Osteopathic Clinical Services – Services that facilitate faculty and student interaction, and include osteopathic manipulative therapy, which are planned and provided systematically throughout the year. These services could include health fairs, or other student community services either in the local community or world community.

Programmatic/Specialized Accrediting Agency – An agency that accredits specific educational programs that prepares students for entry into a profession, occupation, or vocation.

Promotional Materials – as described in Standard 8.5, refers to published materials used to recruit students to a COM, e.g. website announcements, catalogs, and other printed prose. Announcements of recruiting fairs and reminders of such activities are included activities for purposes of this definition. COMs may provide a reference to this information on their webpage in the printed material.

Recommendation – Advice given for the purpose of improving a COM's operations and programs. Recommendations do not signify that the COM does not comply with a standard. Recommendations can be written at any time in the accreditation process.

Requirement – The written statement that indicates that a COM has not satisfied a specific standard or procedure. Requirements can be written at any time in the accreditation process. All requirements will be monitored either through a Progress Report, or an Interim Progress Review, or Focused Visitation.

Should – Indicates a highly recommended element/issue.

Show Cause - a request for information to be provided to the COCA when there is credible reason to believe that a COM may be out of compliance with one or more standards for accreditation.

Teach-out Agreement – A teach-out agreement is a written agreement between accredited COMs that provides for the equitable treatment of students and a reasonable opportunity for students to complete their program of study if one of those COMs or a **Branch Campus** or **Additional Location** that provides one hundred percent of at least one program offered, stops offering its educational program before all students enrolled in that program complete their program of study.

Teach-out Plan – A teach-out plan is a written plan developed by an institution that provides for the equitable treatment of a COM, if that COM or a **Branch Campus** or **Additional Location** that provides one hundred percent of at least one program, stops offering its educational program before all students enrolled in that program complete their program of study. This plan may include, if required by the COCA, a teach-out agreement between COMs.

Types of On-Site Visits

1. Comprehensive on-site visit – A Comprehensive on-site visit is conducted to examine compliance with all areas of the accreditation standards and are conducted by the COCA to determine Provisional and Full accreditation status. At least three (3) days on site are usually required for completion of these on-site visits.

2. Interim Progress Review – An Interim Progress Review is conducted to examine particular areas about which questions have been raised by the COCA. These visits typically occur after a full on-site visit and will examine areas that have been raised by a site visit team.

3. Focused Visitation – A Focused Visitation ordinarily focuses on the particular area(s) identified by the COCA. The COCA may also require a COM to undergo a Focused Visitation when deemed necessary.

USDE – United States Department of Education and the Secretary of Education

Withdrawal –The withdrawal of a COM from the accreditation process; this is a voluntary action initiated by the COM.

CHAPTER IX: TABLES

Table One: Preliminary Timetable for Evaluation from Application Status to Initial Provisional Accreditation Status Decision*

This sequence assumes that a COM will begin instruction in August **not less than two years** after the acceptance of a feasibility study by the COCA Executive Committee (COCA-EC)). The dates in the table represent a minimal timeline and assume a single review of the feasibility study. To assist developing COMs in better appreciating the steps in obtaining pre-accreditation, a detailed spreadsheet has been prepared that may be used for estimating timelines. For more information, see NOTE at the bottom of this page.

Month	Activity	COCA Body Involved
YEAR ONE (three years prior to beginning instruction)		
September 1	COM appoints its Dean; Dean develops Feasibility Study	None
October-December	Dean secures employment of Assoc./Asst. Deans	None
YEAR TWO (two years prior to beginning instruction)		
March	Feasibility Study Received	COCA
May	Review of Feasibility Study and decision on scheduling first evaluation for Pre-accreditation	COCA Executive Committee (COCA-EC)
May	Schedule the Pre-accreditation visit	COCA
June – July	Pre-accreditation site visit is conducted	COCA
August – September	COCA review and approval of Pre-accreditation status	COCA
This table continues on the following page ▶		

Month	Activity	COCA Body Involved
YEAR THREE (one year prior to beginning instruction)		
March-April	COM submits updated Feasibility Study and requests evaluation for Provisional accreditation status	COCA
January - June or July, 60 days after submission of the feasibility study	Initial Provisional accreditation site visit conducted	COCA
April/May or August/September	COCA approval of Provisional accreditation status	COCA
Upon Approval of Initial Provisional Accreditation Status	Begin recruiting	COM
YEAR FOUR (the year in which instruction begins)		
August	Begin instruction	COM

*NOTE: This table is a depiction of an optimal movement through a deliberate review process. The actions described assume a COM is successful at each step of the process. However, this depiction is not a guarantee of actions to be taken by the COCA or the COCA-EC in the review of a developing COM.

EXHIBIT F

Site Development Plans

(to be attached)

EXHIBIT G

MEMORANDUM OF GROUND LEASE FOR RECORD

Idaho State University and ______________________________________entered into a Ground Lease concerning a certain parcel of land as described in Exhibit A (Leased Premises), attached hereto and made a part hereof. The Ground Lease began on the _____ day of ____________, 2016, with an initial term of forty (40) years, with the option to renew for two additional terms of ten (10) years. The Ground Lease contains terms and conditions which affect the use and occupancy of the Leased Premises.

The sole purpose of this Memorandum of Ground Lease for Record is to provide public notice of the existence of this Ground Lease. The addresses for notice to the Parties are:

ISU: President Arthur C. Vailas
Idaho State University
921 So. 8th Ave, Stop 8310
Pocatello, ID 83209

LESSEE: Daniel C. Burrell, Manager
Idaho College of Medicine
401 Paseo de Peralta
Santa Fe, NM 87501

IDAHO STATE UNIVERSITY

BY: ______________________________
Arthur C. Vailas, President

DATE: ____________________________

IDAHO COLLEGE OF OSTEOPATHIC MEDICINE

BY: ____________________________
Daniel C. Burrell, Manager

DATE: __________________________

ATTACHMENT 2

Idaho State
UNIVERSITY

Meridian Health Science Center
1311 East Central Drive • Meridian, Idaho 83642

July 8, 2016

Dr. Mary Ann Ranells, Superintendent
West Ada School District
1303 E Central Dr.
Meridian, ID 83642

Dear Dr. Ranells:

At a special session of the State Board of Education (SBOE) held on February 25, 2016, the SBOE unanimously approved a Collaborative Affiliation Agreement between the Idaho College of Osteopathic Medicine (ICOM), and Idaho State University (ISU) for ICOM to be located by a ground lease agreement on a portion of a recorded parcel of land owned by ISU at the Meridian Health Science Center. The approval was the consequence of a request by Megan Ronk, Director, Idaho Department of Commerce, at an executive session of the SBOE on February 17, 2016, for consideration of a proposed osteopathic medical school. Governor Otter had previously requested that ISU President Art Vailas explore the opportunity for an osteopathic medical school in Idaho, and the Governor convened a meeting on February 4, 2016, with stakeholders, e.g., Idaho Hospital Association, supporting the medical education proposal.

In accordance with the provisions of the Master Declaration Agreement and the Joint Use and Operations Agreement ("The Declaration") between ISU and the West Ada School District (School District), dated December 4, 2007, ISU offers the following to demonstrate that the Ground Lease Agreement between ISU as Lessor, and the ICOM as Lessee, will be in compliance with all applicable provisions of The Declaration.

The Ground Lease Agreement includes complete copies of The Declaration as Exhibit C. It also includes the specific language referenced in both Article 2, Section 2.3(a) of the Master Declaration Agreement and in Article 9, Section 9.2(a) of the Joint Use and Operations Agreement, which states that 1) any lease will be subject to these agreements, 2) the occupant will comply with the provisions of these agreements, and 3) such provisions are an integral part of the lease.

In accordance with Article 2 of the Master Declaration Agreement "Common Area, Easements and Right of Entry"; under Section 2.4 Common Area, ISU hereby notifies the School District of its intention to lease and requests the written consent of the School District by August 1, 2016, before the SBOE holds its next meeting on August 10-11, 2016, for ISU to lease a 2.8 acre portion of the ISU parcel, presently used as a vehicular parking lot, to ICOM for the construction of the ICOM building and related improvements. Per the provisions of Article 7 "Future Improvements" of the Joint Use and Operations Agreement, both the School District and ISU will have the opportunity to review the proposed Site Development Plan (the Plan), which shall be prepared and presented by ICOM for the purposes of this building construction. When ICOM furnishes the Plan, ISU will forward it to the School District for its review and written approval.

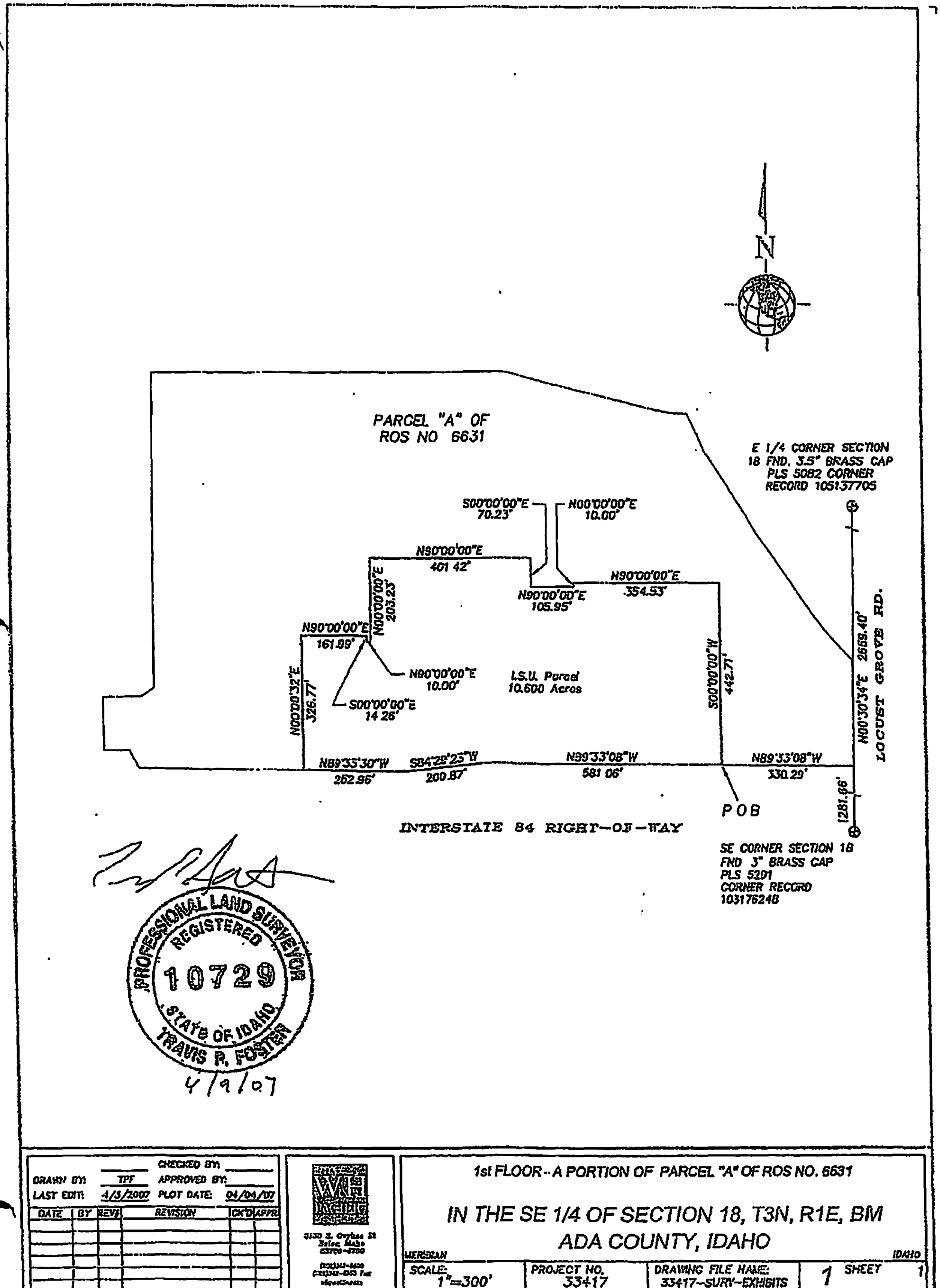
The attached drawings show the location and configuration of the premises within the ISU parcel that ISU will lease to ICOM and the subdivision plat. ISU appreciates the longstanding relationship with the School District, and is pleased to continue the partnership in supporting ICOM and the medical education opportunities for high school and university students.

Sincerely:

Bessie Katsilometes

Dr. Bessie Katsilometes, Associate Vice President
ISU-Meridian Health Science Center

Attachments


N
PARCEL "A" OF
ROS NO 6631
E 1/4 CORNER SECTION
18 FND. 3.5" BRASS CAP
PLS 5082 CORNER
RECORD 105137705
S00°00'00"E
70.23'
N00°00'00"E
10.00'
N90°00'00"E
401.42'
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203.23'
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105.95'
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354.53'
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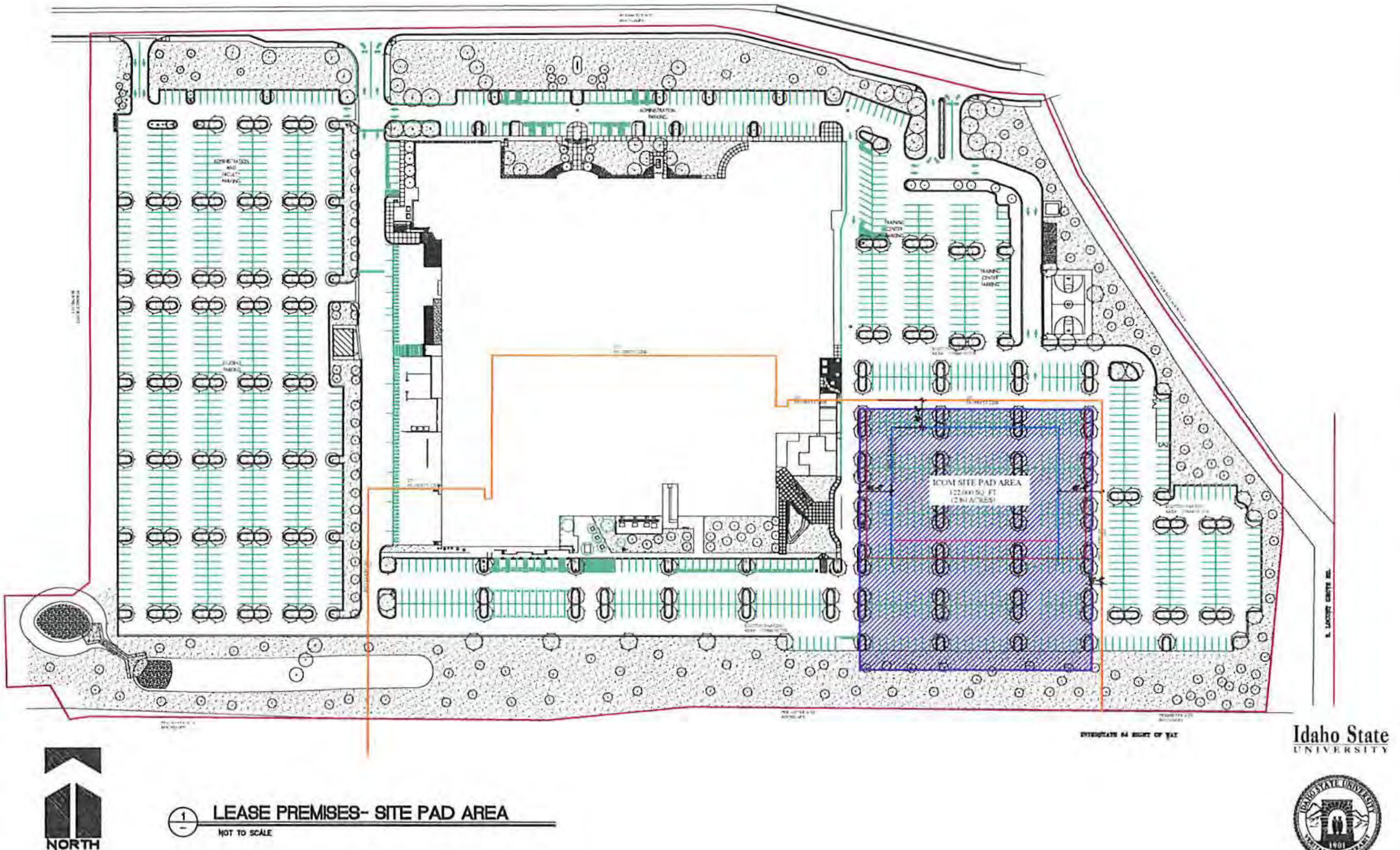
161.99'
N90°00'00"E
10.00'
S00°00'00"E
14.26'
N00°00'32"E
326.77'
I.S.U. Parcel
10.600 Acres
S00°00'00"W
442.71'
N00°30'34"E 2659.40'
LOCUST GROVE RD.
N89°35'30"W
252.96'
S84°28'23"W
200.87'
N89°33'08"W
581.06'
N89°33'08"W
330.29'
1281.66'
POB
INTERSTATE 84 RIGHT-OF-WAY
SE CORNER SECTION 18
FND 3" BRASS CAP
PLS 5291
CORNER RECORD
103176248
PROFESSIONAL LAND SURVEYOR
REGISTERED
10729
STATE OF IDAHO
TRAVIS R. FOSTER
4/9/07
CHECKED BY:
DRAWN BY: TPF
APPROVED BY:
LAST EDIT: 4/5/2007
PLOT DATE: 04/04/07
DATE
BY
REV#
REVISION
CK'D
APPR
1st FLOOR - A PORTION OF PARCEL "A" OF ROS NO. 6631
IN THE SE 1/4 OF SECTION 18, T3N, R1E, BM
ADA COUNTY, IDAHO
MERIDIAN
IDAHO
SCALE: 1"=300'
PROJECT NO. 33417
DRAWING FILE NAME: 33417-SURV-EXHIBITS
1
SHEET 1



FACILITIES SERVICES

"World Class Facilities Professionals Serving ISU Together"

(208) 282-2784 OFFICE
(208) 282-4618 FAX

ISU Meridian Health Science Center
Site Analysis for ICOM at ISU Meridian
1311 E. Central Drive Meridian ID 83642

REVISION:	DATE:
—	—
—	—

DRAWN BY: DHJ

SHEET #: SITE-5

JOB NUMBER: —

PROJECT DATE: 5/23/16

Valbridge
PROPERTY ADVISORS

Appraisal Report

Proposed ICOM Building Site
1303 and 1311 E. Central Drive
Meridian, Idaho 83642

May 12, 2016

FOR:
Idaho State University - Meridian
c/o Dr. Bessie Katsilometes
1311 E. Central Drive
Meridian, Idaho 83642

Valbridge Property Advisors |
Mountain States Appraisal & Consulting, Inc.
1459 Tyrell Ln., Suite B
Boise, ID 83706
208-336-1097 phone
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Valbridge Job No: ID02-16-0076-000

Valbridge PROPERTY ADVISORS
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May 12, 2016

Idaho State University - Meridian
c/o Dr. Bessie Katsilometes
1311 E. Central Drive
Meridian, Idaho 83642

RE: Appraisal Report
Proposed ICOM Building Site
1303 and 1311 E. Central Drive
Meridian, Idaho 83642
Valbridge Job #ID02-16-0076-000

Dear Dr. Katsilometes:

In accordance with your request, we have prepared an appraisal of the above-referenced real property. The subject property is a 2.80 acre pad site proposed to be developed with a 100,000 square foot, 2-3 story, education building. The subject site is currently a part of a larger parcel. As a result of ingress/egress and shared parking easements, the subject's effective land area is larger than actual, estimated herein at 5.55 acres. The effective land area is currently improved with a parking lot.

The subject was appraised using generally accepted principles and theory. We developed our analyses, opinions, and conclusions and prepared this report in conformity with the Uniform Standards of Professional Appraisal Practice (USPAP) of the Appraisal Foundation; the Financial Institutions Reform, Recovery, and Enforcement Act (FIRREA); the Interagency Appraisal and Evaluation Guidelines; the Code of Professional Ethics and Standards of Professional Appraisal Practice of the Appraisal Institute; and the requirements of our client as we understand them. The appraisal report complies with the requirements set forth under Standards Rule 2-2(a) of USPAP. It presents a narrative discussion of the pertinent data gathered, the techniques employed, and the reasoning leading to our value opinions. The depth of the discussion contained in this report is specific to the needs of the client and the intended use.

The purpose of this appraisal is to provide an opinion of 1) Market Value: As Is and 2) Market Rent (for a ground lease). Idaho State University – Meridian is the client in this assignment. The intended use is for internal business decisions. The intended users of this report include the client and any duly appointed representatives of the client, specifically authorized by the client to view or use this appraisal in accordance with the stated purpose or function. The value opinions reported herein are subject to the definitions, assumptions and limiting conditions, and certification contained in this report.

VALBRIDGE PROPERTY ADVISORS: AKRON ● ATLANTA ● BATON ROUGE ● BOISE ● BOSTON ● BOULDER ● CENTRAL VALLEY CA/CENTRAL COUNTIES ● CHARLESTON ● CHARLOTTE ● CINCINNATI ● COEUR D'ALENE ● DALLAS-FORT WORTH ● DAVENPORT ● EAST LANSING ● GREENVILLE ● HARTFORD ● HILTON HEAD ● HOUSTON ● INDIANAPOLIS ● JACKSONVILLE ● KANSAS CITY ● KNOXVILLE ● LAS VEGAS ● LOS ANGELES ● ORANGE COUNTY ● LOUISVILLE ● LUBBOCK ● MEMPHIS ● MILWAUKEE ● MINNEAPOLIS ● MONTEREY/CARMEL ● MONTGOMERY ● NAPLES ● NASHVILLE ● NEW ORLEANS ● NORFOLK/VIRGINIA BEACH ● NORWALK/STAMFORD ● OLYMPIA ● ORLANDO ● PHILADELPHIA ● PITTSBURGH ● RALEIGH ● RICHMOND ● ROANOKE ● SACRAMENTO ● SALT LAKE CITY ● SAN ANTONIO ● SAN DIEGO ● SAN FRANCISCO BAY AREA/EAST BAY ● SAN FRANCISCO BAY AREA/SILICON VALLEY ● SEATTLE ● SHREVEPORT ● SPOKANE ● SOUTHERN UTAH ● TAMPA/ST. PETERSBURG ● TUCSON ● TULSA ● WASHINGTON DC/BALTIMORE

Valbridge PROPERTY ADVISORS
Mountain States Appraisal & Consulting, Inc.

The acceptance of this appraisal assignment and the completion of the appraisal report submitted herewith are contingent on the following extraordinary assumptions and/or hypothetical conditions:

Extraordinary Assumptions:
The subject is currently a part of a larger parcel. A metes and bounds legal description for the subject site was not provided in conjunction with this appraisal. According to the client, the subject actual site size is 122,000 square feet or 2.80 acres. The subject site is proposed to be developed with a 100,000 square foot, 2-3 story, education building. As a result of ingress/egress and shared parking easements, the subject's effective land area is larger than actual, estimated herein at 5.55 acres. Should the building size change, the effective site area would also change.

If this extraordinary assumption is later proven to be false, the value conclusion(s) reported herein could be rendered invalid, and further valuation analysis would be warranted.

Hypothetical Conditions:
None

Based on the analysis contained in the following report, our value conclusion(s) for the subject property are summarized as follows:

Value Conclusion(s)

Value Type	Value Premise	Interest Appraised	Effective Date	Value Conclusion
Market Value	As Is	Fee Simple	4/7/2016	$2,090,000
Annual Market Rent	As Is	Fee Simple	4/7/2016	$190,000

This letter of transmittal must be accompanied by all sections of this report as outlined in the Table of Contents for the value opinion(s) set forth above to be valid.

Respectfully submitted,
Valbridge Property Advisors | Mountain States Appraisal & Consulting, Inc.

Jeff R. Vance

Joe Corlett

Jeff Vance, MAI
Senior Appraiser
State of Idaho Certification No. CGA-2828
Certification Expiration Date: 4/18/17
E-mail: jvance@valbridge.com

Joe Corlett, MAI, SRA
Senior Managing Director
State of Idaho Certificate No. CGA-7
Certification Expiration Date: 3/11/17
E-mail: jcorlett@valbridge.com

Table of Contents

Summary of Salient Facts

Property Name:	Proposed ICOM Building Site
Property Identification:	
Address:	1303 and 1311 E. Central Drive
City, State, Zip Code:	Meridian, Idaho 83642
Assessor Parcel No(s).	Portion of R4704570100 and R4704570200
Property Ownership:	Larger Parcel: Meridian Joint School District No. 2 and Board of Trustees for Idaho State University
Zoning:	C-G; General Retail & Service Commercial
Site Size:	Pad size: 122,000 sf; 2.80 acres Effective size: 241,947 sf; 5.55 acres
Use:	
Property Type and Subtype:	Commercial land
Property Use:	Current: Parking lot; Proposed: Education building
Improvements:	Parking improvements
Location Quality:	Good
Extraordinary Assumptions:	Yes, see letter of transmittal
Hypothetical Conditions:	None
Highest and Best Use:	
As If Vacant/As Vacant:	Educational or supporting office use
As Improved:	n/a
Purpose of Appraisal:	Provide an opinion of 1) Market Value: As Is and 2) Market Rent (for a ground lease)
Property Rights Appraised:	Fee Simple
Date of Inspection:	April 7, 2016
Date of Value(s):	April 7, 2016
Date of Report Preparation:	May 12, 2016
Concluded Value Opinions:	
Market Value: As Is	$2,090,000
Annual Market Rent (ground lease rent)	$190,000

Aerial and Site Views

AERIAL VIEW
(APPROXIMATE SITE AREA)

SITE VIEW

Introduction

Client and Other Intended Users of the Appraisal

The intended users of this report include the client, Idaho State University - Meridian, and any duly appointed representatives of the client, specifically authorized by the client to view or use this appraisal in accordance with the stated purpose or function.

Intended Use of the Appraisal

The intended use is for internal business decisions.

Real Estate Identification

The subject is a part of a larger parcel located at 1303 and 1311 E. Central Drive. The Ada County Assessor identifies the larger parcel as Assessor Parcel Numbers R4704570100 and R4704570200. The subject is located within the incorporated city limits of Meridian.

Legal Description

The subject site is a portion of Lot 1 (R4704570100) and Lot 2 (R4704570200), Block 1, Joint No. 2 Subdivision Phase 1, City of Meridian, Ada County, Idaho.

Real Property Interest Appraised

We have appraised the fee simple interest in the subject property.

Type and Definition of Value

We developed opinions of the following types of value for the subject property. We also provided an opinion of market rent for the subject (as a ground lease).

VALUATION SCENARIOS

Valuation	Completed
Market Value: As Is	Yes

Market Value Definition- Source: 12 CFR Part 34.42 (FIRREA)

The most probable price which a property should bring in a competitive and open market under all conditions requisite to a fair sale, the buyer and seller each acting prudently and knowledgeably, and assuming the price is not affected by undue stimulus. Implicit in this definition is the consummation of a sale as of a specified date and the passing of title from seller to buyer under conditions whereby:

a. Buyer and seller are typically motivated;
b. Both parties are well informed or well advised, and acting in what they consider their own best interests;
c. A reasonable time is allowed for exposure in the open market;
d. Payment is made in terms of cash in United States dollars or in terms of financial arrangements comparable thereto; and
e. The price represents the normal consideration for the property sold unaffected by special or creative financing or sales concessions granted by anyone associated with the sale.

Please refer to the Glossary in the Addenda section for further definitions of value type(s) employed in this report.

Effective Date(s) of Value

The effective date of value is April 7, 2016, coinciding with the date of the inspection.

Date of Report

The date of this report is May 12, 2016. Our conclusions are reflective of market conditions as of the effective date of value.

Scope of Work

The scope of work includes all steps taken in the development of the appraisal. This includes 1) the extent to which the subject property is identified, 2) the extent to which the subject property is inspected, 3) the type and extent of data researched, 4) the type and extent of analysis applied, and the type of appraisal report prepared.

The subject site was legally identified via city, county, public records, and information provided by the client. The subject was inspected by Jeff Vance, MAI, on April 7, 2016. This included walking the site, viewing the property from several different angles, and driving the neighborhood. Joe Corlett, MAI, SRA, also completed a current inspection of the subject property.

We researched and analyzed: 1) market area data, 2) property-specific, market-analysis data, 3) zoning and land-use data, and 4) current data on comparable sales, listings, rentals in the competitive market area. We observed surrounding land use trends, demand for the subject property, and relative legal limitations in concluding a highest and best use. We then appraised the subject based on the highest and best use conclusion, relying on the Sales Comparison Approach. The Income Capitalization Approach and Cost Approach were not completed; they are not applicable for land valuation in this market. Our opinion of market rent for the subject site was estimated based on market comparables of ground leases in the local market.

This is an Appraisal Report as defined by Uniform Standards of Professional Appraisal Practice under Standards Rule 2-2(a). It presents a narrative discussion of the pertinent data gathered, the techniques employed, and the reasoning leading to our value opinions. The depth of the discussion contained in this report is specific to the needs of the client and the intended use.

Use of Real Estate

As of the Date of Value: The subject property was part of a larger parcel and was being utilized as a parking lot.

As of the Date of this Report: Same as above.

Ownership and Sales History

The larger parcel is comprised of two parcels. According to Ada County Assessor records, parcel R4704570200 is owned by Board of Trustees for Idaho State University; parcel R4704570100 is owned by Meridian Joint School District No. 2. Each entity has owned their respective property for more than three years. To our knowledge, no transactions of the subject properties have occurred within the past three years. The properties are not currently listed for sale.

List of Items Requested but Not Provided

None

Extraordinary Assumptions

The subject is currently a part of a larger parcel. A metes and bounds legal description for the subject site was not provided in conjunction with this appraisal. According to the client, the subject actual site size is 122,000 square feet or 2.80 acres. The subject site is proposed to be developed with a 100,000 square foot, 2-3 story, education building. As a result of ingress/egress and shared parking easements, the subject's effective land area is larger than actual, estimated herein at 5.55 acres. Should the building size change, the effective site area would also change.

If this extraordinary assumption is later proven to be false, the value conclusion(s) reported herein could be rendered invalid, and further valuation analysis would be warranted.

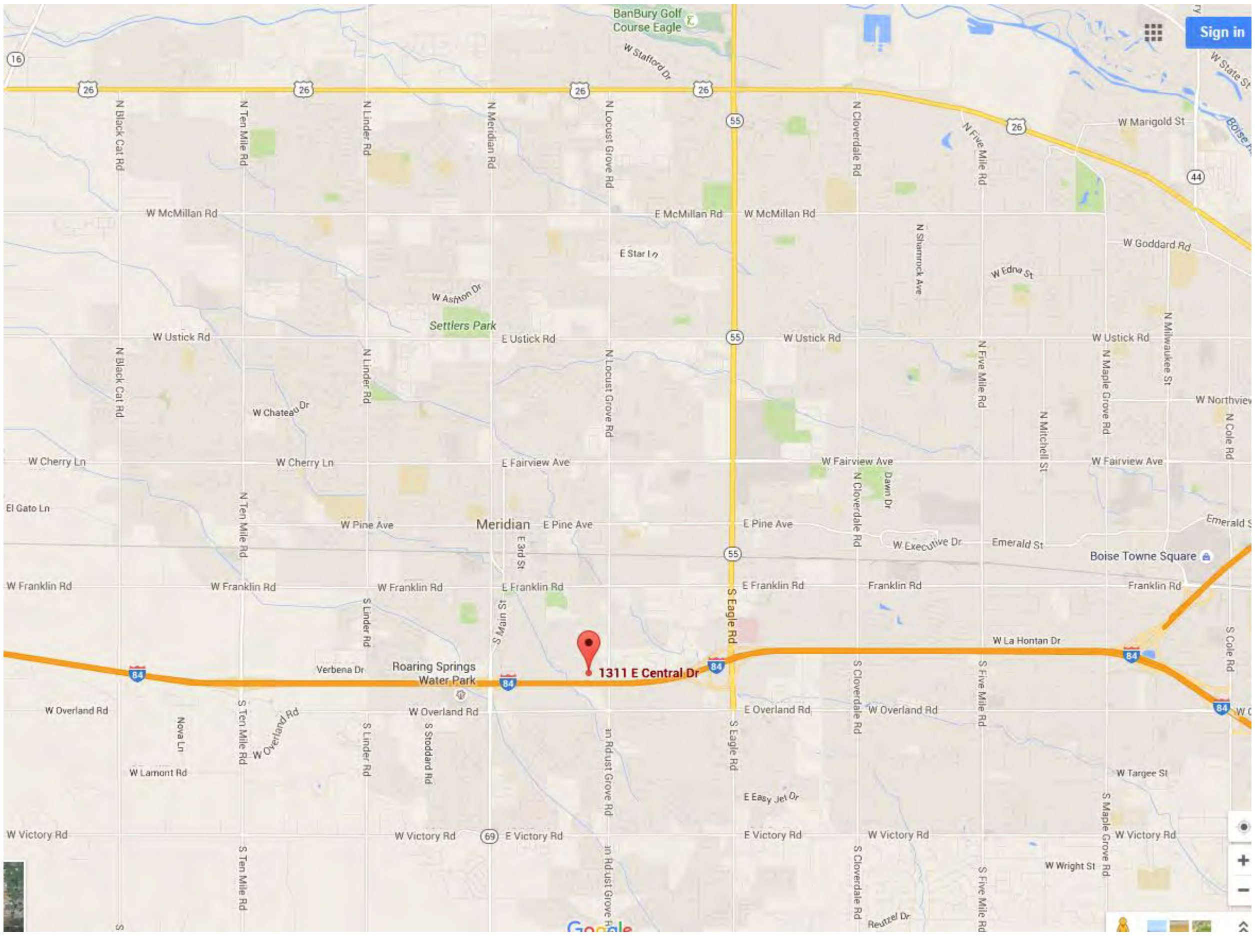
Hypothetical Conditions

None

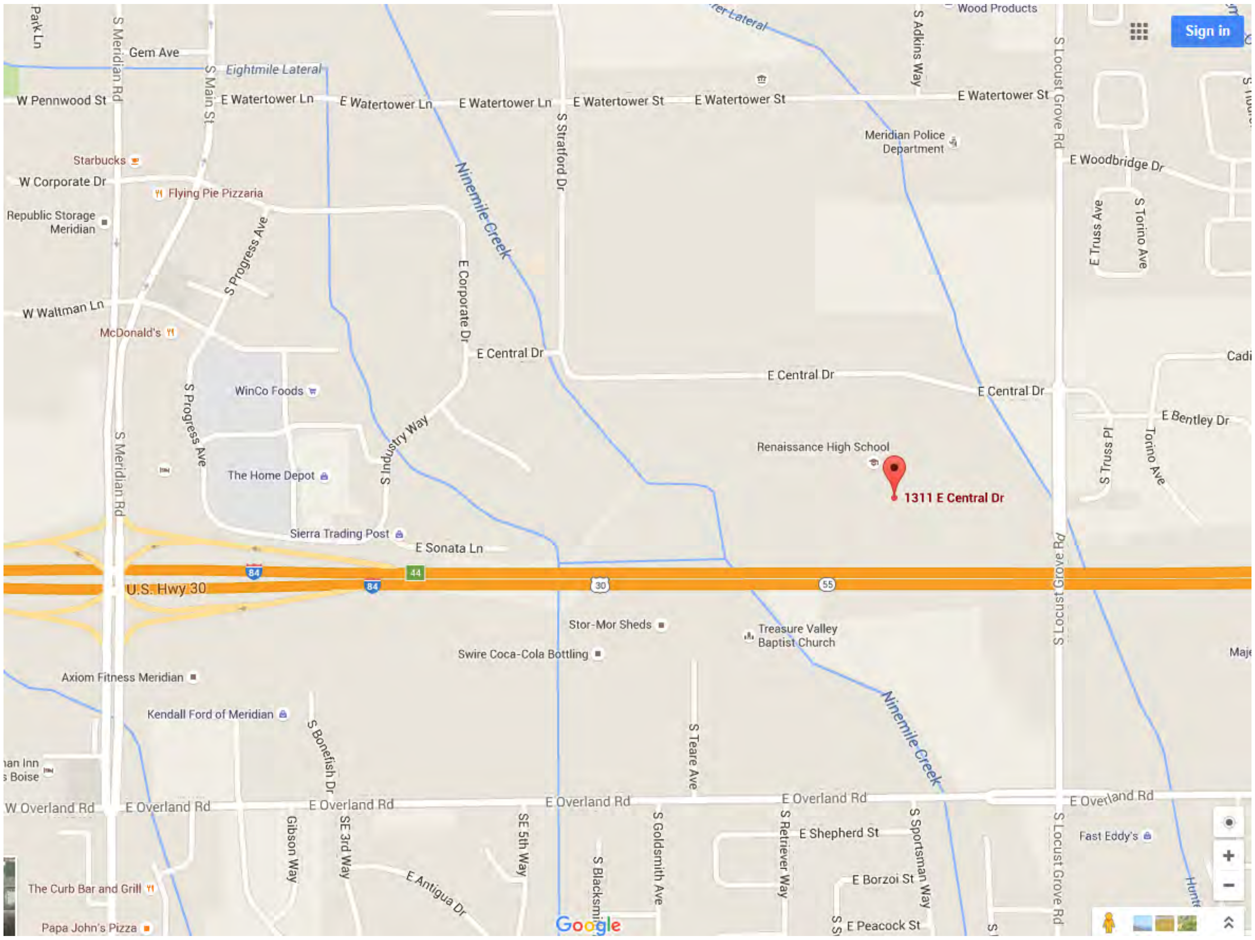
Regional, City, & Neighborhood Analysis

Regional Map

City Map


1311 E Central Dr
Meridian
BanBury Golf Course Eagle
Settlers Park
Roaring Springs Water Park
Boise Towne Square
W McMillan Rd
W Ustick Rd
W Cherry Ln
E Fairview Ave
W Pine Ave
E Pine Ave
W Franklin Rd
E Franklin Rd
W Overland Rd
E Overland Rd
W Victory Rd
E Victory Rd
N Black Cat Rd
N Ten Mile Rd
N Linder Rd
N Meridian Rd
N Locust Grove Rd
S Eagle Rd
N Cloverdale Rd
N Five Mile Rd
Sign in

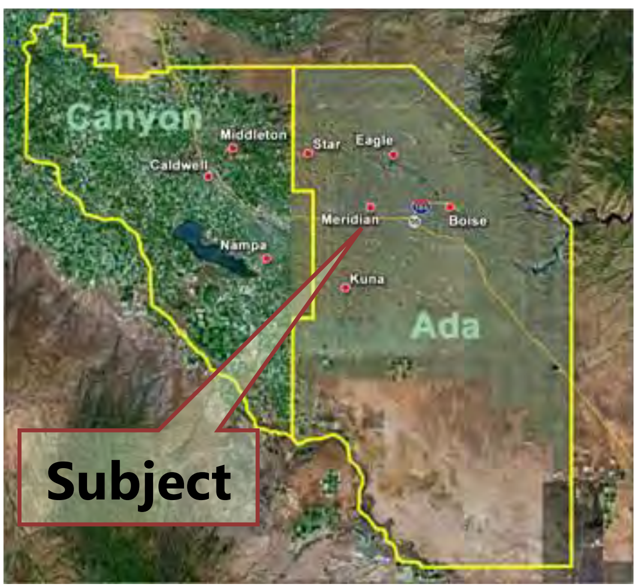
Neighborhood Map



Regional Overview

The subject's regional area is located in southwest Idaho, which is generally referred to as the Treasure Valley or the Boise-Nampa Metropolitan Statistical Area (Boise MSA). As defined by the U.S. Census Bureau, the Boise MSA consists of five counties anchored by the cities of Boise, Meridian, and Nampa. It is the state's largest metropolitan statistical area and includes Idaho's three largest cities – Boise, Nampa, and Meridian. Nearly 40% of Idaho's total population resides in the valley. The population of the Boise MSA is approximately 650,000. The metro area is currently the 3rd largest in the Pacific Northwest after Seattle and Portland. Boise is the capital and most populous city in Idaho, as well as the county seat of Ada County. Located on the Boise River, Boise is the principal city in the Boise MSA, and is the largest city between Salt Lake City, Utah and Portland, Oregon. Boise serves as the primary government, economic, cultural, and education center for Southwest Idaho, Eastern Oregon, and Northern Nevada.

County and City Overview



The subject is located in Ada County in the City of Meridian. Ada County is located in southwestern Idaho and is the state's most populated county. Cities in Ada County include Boise, Meridian, Eagle, Garden City, Kuna, and Star. Boise is the largest city in Idaho and is the State Capitol and Ada County's seat of government. Boise is headquarters for a number of major corporations and serves as the primary government, economic, cultural, and education center for Southwest Idaho, Eastern Oregon, and Northern Nevada. Boise is continually recognized in numerous publications as one of the best places to live in the country. Meridian is located adjacent west of Boise and is one of Idaho's fastest growing cities.

Canyon County is adjacent west of Ada County and is the second most populated county in Idaho. Cities in Canyon County include Nampa, Caldwell, and Middleton. Greenleaf, Melba, Notus, Parma, and Wilder are small rural communities also located within Canyon County. Many residents commute to work from Canyon County to benefit from lower overall housing prices and a more rural environment relative to Ada County. Canyon County's economy has historically been agriculturally-oriented, though it has become more urbanized over the past two decades. Out of 44 counties in Idaho, Canyon County ranks 39th in size, yet it produces ten percent of the state's agricultural income. As a product of the agricultural base, a number of manufacturing and processing businesses are headquartered in the county.

Ada County Workforce Trends

The following data is prepared quarterly by the Idaho Department of Labor and presents a description of Ada County's work force trends.

Ada County

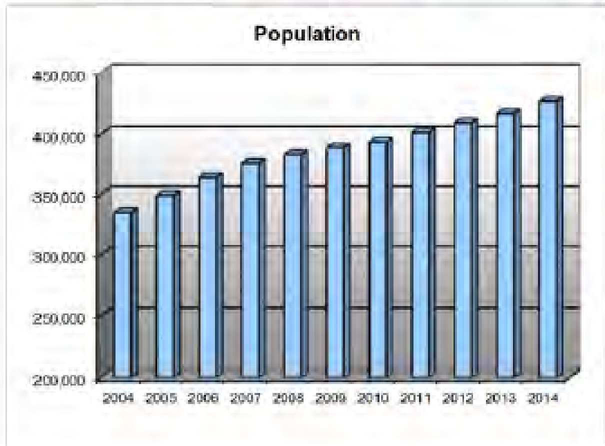
IDAHO DEPT. OF LABOR

December 2015

Workforce Trends

Population

Ada County is Idaho's most populous with over 425,000 residents. It is a regional center of government, industry and education. It is more than twice the size of neighboring Canyon County, the state's second most populous. Ada County ranks 31st among the 44 counties in area. It has grown rapidly, adding 91,310 residents since 2003. Population increased rapidly in the years leading up to the recession. People from other states flocked to the county for its outdoor lifestyle and comparatively low real estate prices. While annual population growth has slowed since then. However, the county continues to grow more rapidly than the nation, growing 2.3 percent between 2013 and 2014.



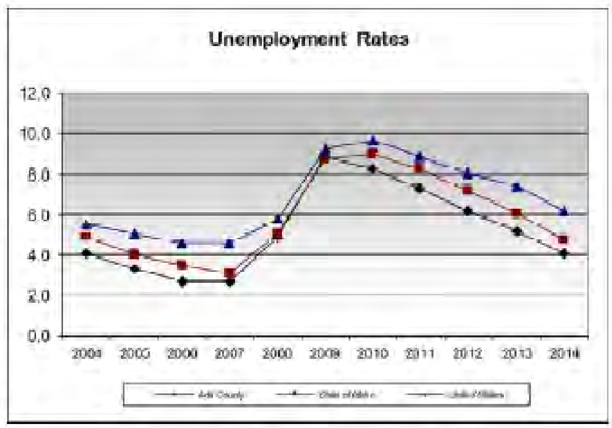
Labor Force & Employment

The Ada County labor force grew significantly between 2004 and 2014, increasing by over 33,000. But Ada County has more jobs than its labor force supports, requiring commuters from neighboring counties to fill them. During 2014, the unemployment rate continued to decline, dropping 1.4 points from 2013. The county consistently posts rates below the statewide average.

2013 continued to show an increase in the county's annual payroll, adding 6,700 covered jobs. Four industrial sectors made up nearly 80 percent of the growth. The largest growth was in trade, utilities & transportation sector which added 1,733 jobs. This was followed by an additional 1,250 jobs each in construction and education and health care. Leisure and hospitality was the fourth sector with an additional 1,140 jobs.

Over the decade, the county has increased payrolls by over 22,320. That is impressive considering this time frame included the worst recession in recent memory. Construction and manufacturing lost over 6,000 jobs between 2004 and 2014. These sectors made up 18 percent of the covered employment in 2003 but comprise only 13 percent now.

Despite the recession, education and health care posted a gain of over 10,800 jobs since 2004. This sector was followed by trade, utilities and transportation with almost 6,300 new jobs. Leisure and hospitality added over 4,500 jobs over the decade, while professional and business Services saw a growth of 2,315 jobs.



Labor Force	Nov 14	Nov 15
Civilian Labor Force	210,246	215,610
Total Employment	202,266	208,377
Unemployed	7,980	7,233
% of Labor Force Unemployed	3.8	3.4
State of Idaho % Unemployed	4.5	3.9
U.S. % Unemployed	5.8	5.0

Labor Force	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013	2014
Civilian Labor Force	178,289	187,127	193,828	196,740	196,434	196,383	196,922	200,142	204,275	206,513	210,284
Unemployment	7,241	6,213	5,211	5,240	9,586	17,491	16,360	14,612	12,620	10,722	8,620
% of Labor Force Unemployed	4.1	3.3	2.7	2.7	4.9	8.9	8.3	7.3	6.2	5.2	4.1
Employment	171,048	180,914	188,617	191,500	186,848	178,892	180,562	185,529	191,656	195,791	201,664

Prepared by Ethan Mansfield, Regional Economist, Idaho Department of Labor • 317 W. Main St., Boise, Idaho 83735
Phone: (208) 332-3570, ext 3455 • email: ethan.mansfield@labor.idaho.gov • Labor Market Information website: lmi.idaho.gov

Nonfarm Payroll Jobs for 2014

Per Capita Income & Employment

Ada County rose to 6th place among the 44 counties in per capita income with $42,395 in 2013, an increase of $1,145 from 2012. That was still 17 percent higher than statewide per capita income but 5 percent, or $2,370, less than national per capita income.

In 2013, most sectors paid more than the average wage of $43,031, however, almost a third of total employment was in the industries that paid lower average wages, such as Leisure and Hospitality (food service, accommodation, and entertainment) and Trade, Utilities and Transportation, (especially retail trade).

Major Private Employers
St. Luke's Regional Medical Center
St. Alphonsus Regional Medical Center
Blue Cross of Idaho Health Services
DirecTV
Hewlett Packard
Idaho Power Co.
Micron Technology, Inc.
Fred Meyer
Wal-Mart
Citicorp
Supervalue

Occupational Wages*	Entry Level Wage
Medical Assistants	$11.97
Waiters and Waitresses	$7.83
Structural Metal Fabricators and Fitters	$13.70
Customer Service Representatives	$9.83
Electricians	$15.29
Construction Laborers	$10.46
Team Assemblers	$9.02
Registered Nurse	$23.23
Exec Secretaries & Admin Assistants	$13.02
Welders	$12.26
Retail Salespersons	$8.14

* Additional occupational wage data can be found on the Idaho Department of Labor website at lmi.idaho.gov.

Covered Employment & Average Annual Wages Per Job for 2004, 2013 & 2014	2004		2013		2014	
	Average Employment	Average Wages	Average Employment	Average Wages	Average Employment	Average Wages
Total Covered Wages	188,109	$36,729	205,760	$43,028	210,429	$44,870
Agriculture	713	$24,593	776	$30,346	767	$32,459
Mining	124	$41,212	119	$76,360	180	$85,163
Construction	12,310	$37,023	10,641	$46,172	11,254	$45,049
Manufacturing	20,830	$55,796	15,864	$83,233	15,767	$98,006
Trade, Utilities & Transportation	34,948	$31,349	39,765	$38,759	41,244	$40,552
Information	3,475	$45,491	3,607	$49,701	3,551	$51,493
Financial Activities	10,595	$40,980	11,345	$53,647	11,649	$54,641
Professional and Business Services	31,751	$38,257	34,088	$42,859	34,066	$43,409
Educational and Health Services	22,648	$34,826	32,478	$43,593	33,457	$44,791
Leisure and Hospitality	17,340	$12,169	21,090	$16,128	21,890	$16,490
Other Services	5,137	$22,211	5,359	$25,787	5,516	$26,246
Government	28,236	$37,676	30,830	$44,197	31,088	$44,918

Per Capita Income	2004	2005	2006	2007	2008	2009	2010	2011	2012	2013
Ada County	$38,689	$39,210	$42,693	$42,204	$40,036	$38,709	$39,164	$40,096	$41,250	$42,395
State of Idaho	$28,974	$29,989	$32,035	$33,057	$32,819	$31,688	$32,100	$33,677	$35,142	$36,146
United States	$34,300	$35,888	$38,127	$39,804	$40,873	$39,379	$40,144	$42,332	$44,200	$44,765

Information provided by Bureau of Economic Analysis

IDAHO DEPARTMENT OF LABOR
C.L. "BUTCH" OTTER, GOVERNOR
KENNETH D. EDMUNDS, DIRECTOR

This county is served by the offices located at the addresses below:

Idaho Department of Labor
219 W. Main St.
Boise, ID 83735-0030 Ph: (208) 332-3575

or

Idaho Department of Labor
1090 E. Watertower Lane, Suite 100
Meridian, ID 83642-6282 Ph: (208) 364-7785

labor.idaho.gov

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Employment

Major employers in the Boise MSA include Micron Technology, Hewlett Packard, IDACORP (parent company of Idaho Power), Citicorp, Blue Cross of Idaho Health Services, Boise Company, Albertson's, J.R. Simplot Company, St. Luke's Regional Medical Center, St. Alphonsus Regional Medical Center, DirecTV, and Bodybuilding.com. Downtown Boise, in particular, has a strong employment base with several major employers including regional headquarters for Wells Fargo Bank, U.S. Bank, and Key Bank. Several of the major employers previously mentioned are located in downtown Boise. Boise also serves as the base for local, State, and Federal Government offices.

The Ada County labor market accounts for 25% of total Idaho employment. The unemployment rate in Ada County peaked at approximately 8.8% in March 2010. In 2011, the unemployment rate saw its first annual decline since the recession began in late-2007. The unemployment rate has continued its downward trend and was 4% at year-end 2014. After bottoming out at 180,153 in 2009, average annual total employment has increased to 201,676 at year-end 2014, represented an increase of 11.9%.

Population and Demographics

Both Ada County and the City of Meridian have experienced strong population growth during the past two decades. From 2000 to 2014, the population in Ada County increased from 300,904 to 407,073, representing a 35.3% increase during this period. The population in Meridian has increased from 41,315 to 80,011, representing a 93.7% increase during this same period. The area has been a popular relocation destination during this period. People have been attracted to the outdoor lifestyle, relatively low cost of living, diversity of the economy, and availability of employment.

Market area demographics and forecasts of the projected growth by Site To Do Business Online are reprinted in the following tables. The statistics illustrate the expectation of continued growth for the foreseeable future.

esri

Market Profile

915 E Central Dr, Meridian, Idaho, 83642 2
915 E Central Dr, Meridian, Idaho, 83642

Prepared by Esri
Latitude: 43.59513
Longitude: -116.38264

	1 mile	3 miles	5 miles
Population Summary			
2000 Total Population	3,363	36,656	96,773
2010 Total Population	5,457	53,966	150,509
2015 Total Population	5,923	58,702	165,328
2015 Group Quarters	50	319	562
2020 Total Population	6,602	63,847	180,721
2015-2020 Annual Rate	2.19%	1.69%	1.80%
Household Summary			
2000 Households	1,192	12,474	32,893
2000 Average Household Size	2.81	2.91	2.92
2010 Households	2,025	19,111	52,069
2010 Average Household Size	2.67	2.81	2.88
2015 Households	2,214	20,916	57,412
2015 Average Household Size	2.65	2.79	2.87
2020 Households	2,482	22,838	62,939
2020 Average Household Size	2.64	2.78	2.86
2015-2020 Annual Rate	2.31%	1.77%	1.86%
2010 Families	1,617	14,557	40,090
2010 Average Family Size	2.97	3.20	3.26
2015 Families	1,759	15,821	43,917
2015 Average Family Size	2.96	3.19	3.26
2020 Families	1,967	17,181	47,882
2020 Average Family Size	2.94	3.18	3.26
2015-2020 Annual Rate	2.26%	1.66%	1.74%
Housing Unit Summary			
2000 Housing Units	1,246	12,921	34,107
Owner Occupied Housing Units	82.8%	80.3%	80.9%
Renter Occupied Housing Units	12.8%	16.3%	15.5%
Vacant Housing Units	4.3%	3.5%	3.6%
2010 Housing Units	2,135	20,117	55,053
Owner Occupied Housing Units	76.0%	70.9%	72.9%
Renter Occupied Housing Units	18.8%	24.1%	21.7%
Vacant Housing Units	5.2%	5.0%	5.4%
2015 Housing Units	2,308	21,816	60,039
Owner Occupied Housing Units	74.7%	69.3%	71.5%
Renter Occupied Housing Units	21.2%	26.6%	24.1%
Vacant Housing Units	4.1%	4.1%	4.4%
2020 Housing Units	2,672	23,871	65,541
Owner Occupied Housing Units	73.1%	69.5%	71.9%
Renter Occupied Housing Units	19.8%	26.2%	24.1%
Vacant Housing Units	7.1%	4.3%	4.0%
Median Household Income			
2015	$77,113	$64,069	$62,856
2020	$89,124	$77,161	$76,145
Median Home Value			
2015	$243,975	$214,819	$223,515
2020	$279,464	$249,485	$258,893
Per Capita Income			
2015	$30,251	$27,074	$27,640
2020	$34,104	$30,805	$31,499
Median Age			
2010	35.2	33.7	34.0
2015	35.1	34.2	34.6
2020	35.2	34.7	34.9

Data Note: Household population includes persons not residing in group quarters. Average Household Size is the household population divided by total households. Persons in families include the householder and persons related to the householder by birth, marriage, or adoption. Per Capita Income represents the income received by all persons aged 15 years and over divided by the total population.
Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2015 and 2020. Esri converted Census 2000 data into 2010 geography.

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Market Profile

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915 E Central Dr, Meridian, Idaho, 83642

Prepared by Esri
Latitude: 43.59513
Longitude: -116.38264

	1 mile	3 miles	5 miles
2015 Households by Income			
Household Income Base	2,214	20,916	57,412
<$15,000	5.1%	7.1%	6.5%
$15,000 - $24,999	5.8%	7.3%	7.6%
$25,000 - $34,999	6.9%	8.8%	9.4%
$35,000 - $49,999	10.6%	11.9%	12.8%
$50,000 - $74,999	19.8%	22.6%	22.3%
$75,000 - $99,999	16.4%	16.9%	15.5%
$100,000 - $149,999	26.6%	19.1%	16.5%
$150,000 - $199,999	5.2%	3.8%	5.8%
$200,000+	3.7%	2.6%	3.7%
Average Household Income	$87,653	$76,377	$79,054
2020 Households by Income			
Household Income Base	2,482	22,838	62,939
<$15,000	3.9%	6.0%	5.5%
$15,000 - $24,999	3.5%	4.8%	5.2%
$25,000 - $34,999	4.8%	6.7%	7.2%
$35,000 - $49,999	8.2%	9.9%	10.5%
$50,000 - $74,999	17.2%	20.1%	20.3%
$75,000 - $99,999	19.1%	20.3%	19.4%
$100,000 - $149,999	33.5%	24.7%	20.6%
$150,000 - $199,999	5.9%	4.7%	7.1%
$200,000+	3.7%	2.8%	4.1%
Average Household Income	$98,323	$86,635	$89,856
2015 Owner Occupied Housing Units by Value			
Total	1,724	15,114	42,943
<$50,000	0.3%	1.2%	1.7%
$50,000 - $99,999	1.6%	2.1%	2.2%
$100,000 - $149,999	6.3%	11.0%	9.9%
$150,000 - $199,999	19.3%	29.0%	25.2%
$200,000 - $249,999	25.8%	22.9%	23.3%
$250,000 - $299,999	17.8%	13.6%	15.4%
$300,000 - $399,999	19.5%	13.4%	14.5%
$400,000 - $499,999	6.3%	4.5%	4.5%
$500,000 - $749,999	2.7%	2.0%	2.4%
$750,000 - $999,999	0.3%	0.3%	0.4%
$1,000,000 +	0.3%	0.2%	0.4%
Average Home Value	$269,348	$239,402	$248,061
2020 Owner Occupied Housing Units by Value			
Total	1,954	16,591	47,133
<$50,000	0.1%	0.7%	1.2%
$50,000 - $99,999	0.7%	1.1%	1.3%
$100,000 - $149,999	1.6%	3.7%	3.2%
$150,000 - $199,999	10.5%	19.6%	16.2%
$200,000 - $249,999	23.5%	25.1%	24.3%
$250,000 - $299,999	22.9%	19.6%	21.6%
$300,000 - $399,999	25.7%	18.9%	19.9%
$400,000 - $499,999	9.5%	7.2%	7.0%
$500,000 - $749,999	4.2%	3.1%	3.6%
$750,000 - $999,999	0.8%	0.7%	1.1%
$1,000,000 +	0.4%	0.3%	0.6%
Average Home Value	$307,856	$277,842	$288,767

Data Note: Income represents the preceding year, expressed in current dollars. Household income includes wage and salary earnings, interest dividends, net rents, pensions, SSI and welfare payments, child support, and alimony.
Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2015 and 2020. Esri converted Census 2000 data into 2010 geography.

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Market Profile

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Prepared by Esri
Latitude: 43.59513
Longitude: -116.38264

	1 mile	3 miles	5 miles
2010 Population by Age			
Total	5,457	53,965	150,511
0 - 4	8.2%	8.4%	8.2%
5 - 9	8.9%	9.1%	9.0%
10 - 14	9.0%	8.5%	8.6%
15 - 24	11.6%	12.1%	12.1%
25 - 34	12.0%	13.7%	13.5%
35 - 44	15.1%	15.1%	14.9%
45 - 54	13.9%	13.3%	13.4%
55 - 64	10.3%	9.8%	10.4%
65 - 74	5.9%	5.5%	5.8%
75 - 84	3.3%	3.0%	2.9%
85 +	1.7%	1.5%	1.2%
18 +	68.8%	69.3%	69.4%
2015 Population by Age			
Total	5,923	58,704	165,328
0 - 4	8.0%	8.0%	7.9%
5 - 9	8.2%	8.2%	8.2%
10 - 14	8.7%	8.7%	8.6%
15 - 24	13.5%	13.4%	13.1%
25 - 34	11.4%	12.8%	12.9%
35 - 44	14.0%	14.3%	14.3%
45 - 54	13.6%	13.2%	13.0%
55 - 64	10.5%	10.3%	10.7%
65 - 74	7.4%	6.8%	7.2%
75 - 84	3.1%	2.9%	3.0%
85 +	1.6%	1.4%	1.2%
18 +	70.0%	70.4%	70.7%
2020 Population by Age			
Total	6,603	63,847	180,722
0 - 4	7.8%	7.9%	7.8%
5 - 9	7.8%	7.8%	7.9%
10 - 14	8.3%	8.2%	8.2%
15 - 24	13.1%	13.3%	12.6%
25 - 34	12.7%	13.3%	13.5%
35 - 44	12.8%	13.9%	14.3%
45 - 54	12.8%	12.6%	12.1%
55 - 64	11.2%	10.7%	10.7%
65 - 74	7.9%	7.5%	8.0%
75 - 84	3.9%	3.5%	3.6%
85 +	1.6%	1.4%	1.2%
18 +	70.9%	71.3%	71.3%
2010 Population by Sex			
Males	2,678	26,372	74,050
Females	2,779	27,594	76,459
2015 Population by Sex			
Males	2,913	28,730	81,338
Females	3,010	29,972	83,990
2020 Population by Sex			
Males	3,245	31,265	88,873
Females	3,357	32,583	91,848

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2015 and 2020. Esri converted Census 2000 data into 2010 geography.

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	1 mile	3 miles	5 miles
2010 Population by Race/Ethnicity			
Total	5,456	53,966	150,510
White Alone	92.2%	91.6%	90.9%
Black Alone	0.9%	0.8%	0.9%
American Indian Alone	0.5%	0.6%	0.6%
Asian Alone	1.8%	1.9%	2.6%
Pacific Islander Alone	0.1%	0.1%	0.2%
Some Other Race Alone	1.9%	2.1%	2.1%
Two or More Races	2.7%	2.9%	2.8%
Hispanic Origin	6.1%	7.0%	6.8%
Diversity Index	24.7	26.9	27.9
2015 Population by Race/Ethnicity			
Total	5,923	58,701	165,328
White Alone	91.2%	90.6%	89.8%
Black Alone	1.0%	0.9%	1.0%
American Indian Alone	0.5%	0.6%	0.6%
Asian Alone	2.0%	2.1%	2.9%
Pacific Islander Alone	0.1%	0.1%	0.2%
Some Other Race Alone	2.1%	2.3%	2.3%
Two or More Races	3.1%	3.3%	3.3%
Hispanic Origin	6.7%	7.6%	7.5%
Diversity Index	27.1	29.5	30.6
2020 Population by Race/Ethnicity			
Total	6,602	63,846	180,720
White Alone	90.2%	89.4%	88.5%
Black Alone	1.3%	1.1%	1.2%
American Indian Alone	0.5%	0.6%	0.6%
Asian Alone	2.3%	2.4%	3.2%
Pacific Islander Alone	0.1%	0.1%	0.2%
Some Other Race Alone	2.2%	2.6%	2.6%
Two or More Races	3.5%	3.8%	3.7%
Hispanic Origin	7.5%	8.6%	8.5%
Diversity Index	30.0	32.6	33.7
2010 Population by Relationship and Household Type			
Total	5,457	53,966	150,509
In Households	99.1%	99.4%	99.6%
In Family Households	90.1%	88.5%	89.1%
Householder	27.2%	26.8%	26.8%
Spouse	22.6%	21.2%	21.7%
Child	36.1%	35.7%	35.8%
Other relative	2.2%	2.5%	2.6%
Nonrelative	2.1%	2.3%	2.2%
In Nonfamily Households	9.0%	10.9%	10.6%
In Group Quarters	0.9%	0.6%	0.4%
Institutionalized Population	0.1%	0.3%	0.2%
Noninstitutionalized Population	0.8%	0.3%	0.2%

Data Note: Persons of Hispanic Origin may be of any race. The Diversity Index measures the probability that two people from the same area will be from different race/ethnic groups.
Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2015 and 2020. Esri converted Census 2000 data into 2010 geography.

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	1 mile	3 miles	5 miles
2015 Population 25+ by Educational Attainment			
Total	3,644	36,227	102,932
Less than 9th Grade	3.1%	2.4%	1.7%
9th - 12th Grade, No Diploma	4.2%	4.4%	4.1%
High School Graduate	13.0%	17.2%	17.7%
GED/Alternative Credential	3.3%	4.5%	3.9%
Some College, No Degree	29.7%	28.3%	27.5%
Associate Degree	8.6%	8.6%	9.3%
Bachelor's Degree	25.8%	25.3%	25.6%
Graduate/Professional Degree	12.2%	9.4%	10.2%
2015 Population 15+ by Marital Status			
Total	4,447	44,077	124,555
Never Married	19.5%	23.1%	23.8%
Married	67.2%	62.3%	61.5%
Widowed	4.8%	4.5%	4.2%
Divorced	8.5%	10.2%	10.5%
2015 Civilian Population 16+ in Labor Force			
Civilian Employed	96.0%	94.9%	95.2%
Civilian Unemployed	4.0%	5.1%	4.8%
2015 Employed Population 16+ by Industry			
Total	2,783	27,342	76,955
Agriculture/Mining	1.1%	1.4%	1.3%
Construction	4.2%	4.9%	6.0%
Manufacturing	9.4%	10.3%	10.4%
Wholesale Trade	4.3%	2.9%	3.0%
Retail Trade	10.9%	12.3%	12.1%
Transportation/Utilities	3.2%	4.6%	4.9%
Information	2.1%	2.8%	2.3%
Finance/Insurance/Real Estate	10.9%	8.5%	7.3%
Services	48.0%	45.1%	46.2%
Public Administration	5.9%	7.1%	6.6%
2015 Employed Population 16+ by Occupation			
Total	2,784	27,341	76,957
White Collar	72.9%	67.1%	67.4%
Management/Business/Financial	21.2%	17.2%	16.4%
Professional	25.9%	23.4%	24.6%
Sales	11.0%	11.8%	11.5%
Administrative Support	14.8%	14.7%	14.8%
Services	13.5%	15.7%	16.0%
Blue Collar	13.6%	17.2%	16.6%
Farming/Forestry/Fishing	0.9%	0.7%	0.4%
Construction/Extraction	2.1%	3.2%	3.5%
Installation/Maintenance/Repair	3.2%	4.2%	4.0%
Production	2.9%	3.8%	3.6%
Transportation/Material Moving	4.6%	5.3%	5.0%

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2015 and 2020. Esri converted Census 2000 data into 2010 geography.

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	1 mile	3 miles	5 miles
2010 Households by Type			
Total	2,026	19,111	52,068
Households with 1 Person	15.6%	18.5%	17.5%
Households with 2+ People	84.4%	81.5%	82.5%
Family Households	79.8%	76.2%	77.0%
Husband-wife Families	66.4%	60.3%	62.5%
With Related Children	33.5%	31.3%	32.2%
Other Family (No Spouse Present)	13.4%	15.8%	14.5%
Other Family with Male Householder	4.2%	4.9%	4.5%
With Related Children	3.3%	3.5%	3.1%
Other Family with Female Householder	9.1%	11.0%	10.0%
With Related Children	6.6%	7.9%	7.1%
Nonfamily Households	4.6%	5.3%	5.5%
All Households with Children	43.8%	43.3%	43.0%
Multigenerational Households	2.7%	3.2%	3.3%
Unmarried Partner Households	5.1%	6.1%	5.7%
Male-female	4.7%	5.5%	5.1%
Same-sex	0.4%	0.5%	0.6%
2010 Households by Size			
Total	2,026	19,109	52,070
1 Person Household	15.6%	18.5%	17.5%
2 Person Household	34.3%	33.2%	33.6%
3 Person Household	17.4%	17.4%	17.3%
4 Person Household	18.5%	17.2%	17.2%
5 Person Household	8.3%	8.2%	8.4%
6 Person Household	3.7%	3.6%	3.8%
7 + Person Household	2.2%	1.9%	2.1%
2010 Households by Tenure and Mortgage Status			
Total	2,025	19,111	52,069
Owner Occupied	80.1%	74.6%	77.1%
Owned with a Mortgage/Loan	65.2%	61.8%	63.3%
Owned Free and Clear	14.9%	12.8%	13.8%
Renter Occupied	19.9%	25.4%	22.9%

Data Note: Households with children include any households with people under age 18, related or not. Multigenerational households are families with 3 or more parent-child relationships. Unmarried partner households are usually classified as nonfamily households unless there is another member of the household related to the householder. Multigenerational and unmarried partner households are reported only to the tract level. Esri estimated block group data, which is used to estimate polygons or non-standard geography.

Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2015 and 2020. Esri converted Census 2000 data into 2010 geography.

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	1 mile	3 miles	5 miles
Top 3 Tapestry Segments			
1.	Soccer Moms (4A)	Soccer Moms (4A)	Soccer Moms (4A)
2.	Middleburg (4C)	Middleburg (4C)	Middleburg (4C)
3.	Bright Young Professionals	Bright Young Professionals	Up and Coming Families
2015 Consumer Spending			
Apparel & Services: Total $	$6,034,096	$49,795,774	$140,850,751
Average Spent	$2,725.43	$2,380.75	$2,453.33
Spending Potential Index	118	103	106
Computers & Accessories: Total $	$684,461	$5,656,001	$16,054,832
Average Spent	$309.15	$270.42	$279.64
Spending Potential Index	118	104	107
Education: Total $	$3,901,516	$31,876,083	$90,835,544
Average Spent	$1,762.20	$1,524.00	$1,582.17
Spending Potential Index	116	100	104
Entertainment/Recreation: Total $	$8,614,061	$70,772,276	$201,352,391
Average Spent	$3,890.72	$3,383.64	$3,507.15
Spending Potential Index	118	102	106
Food at Home: Total $	$13,125,496	$109,295,348	$308,805,833
Average Spent	$5,928.41	$5,225.44	$5,378.77
Spending Potential Index	113	100	103
Food Away from Home: Total $	$8,628,972	$71,130,371	$201,323,188
Average Spent	$3,897.46	$3,400.76	$3,506.64
Spending Potential Index	119	103	107
Health Care: Total $	$12,036,935	$99,416,650	$282,615,376
Average Spent	$5,436.74	$4,753.14	$4,922.58
Spending Potential Index	115	100	104
HH Furnishings & Equipment: Total $	$4,902,631	$40,276,585	$114,349,284
Average Spent	$2,214.38	$1,925.64	$1,991.73
Spending Potential Index	120	105	108
Investments: Total $	$6,020,921	$49,996,392	$148,513,547
Average Spent	$2,719.48	$2,390.34	$2,586.80
Spending Potential Index	99	87	94
Retail Goods: Total $	$65,701,926	$542,591,317	$1,538,389,774
Average Spent	$29,675.67	$25,941.45	$26,795.61
Spending Potential Index	116	102	105
Shelter: Total $	$42,110,668	$349,479,251	$992,859,305
Average Spent	$19,020.18	$16,708.70	$17,293.59
Spending Potential Index	116	102	105
TV/Video/Audio: Total $	$3,300,515	$27,546,713	$77,734,749
Average Spent	$1,490.75	$1,317.02	$1,353.98
Spending Potential Index	114	101	104
Travel: Total $	$5,249,608	$42,571,578	$122,019,725
Average Spent	$2,371.10	$2,035.36	$2,125.33
Spending Potential Index	121	104	109
Vehicle Maintenance & Repairs: Total $	$2,903,668	$24,019,035	$68,216,909
Average Spent	$1,311.50	$1,148.36	$1,188.20
Spending Potential Index	118	103	106

Data Note: Consumer spending shows the amount spent on a variety of goods and services by households that reside in the area. Expenditures are shown by broad budget categories that are not mutually exclusive. Consumer spending does not equal business revenue. Total and Average Amount Spent Per Household represent annual figures. The Spending Potential Index represents the amount spent in the area relative to a national average of 100.
Source: Consumer Spending data are derived from the 2011 and 2012 Consumer Expenditure Surveys, Bureau of Labor Statistics. Esri.
Source: U.S. Census Bureau, Census 2010 Summary File 1. Esri forecasts for 2015 and 2020. Esri converted Census 2000 data into 2010 geography.

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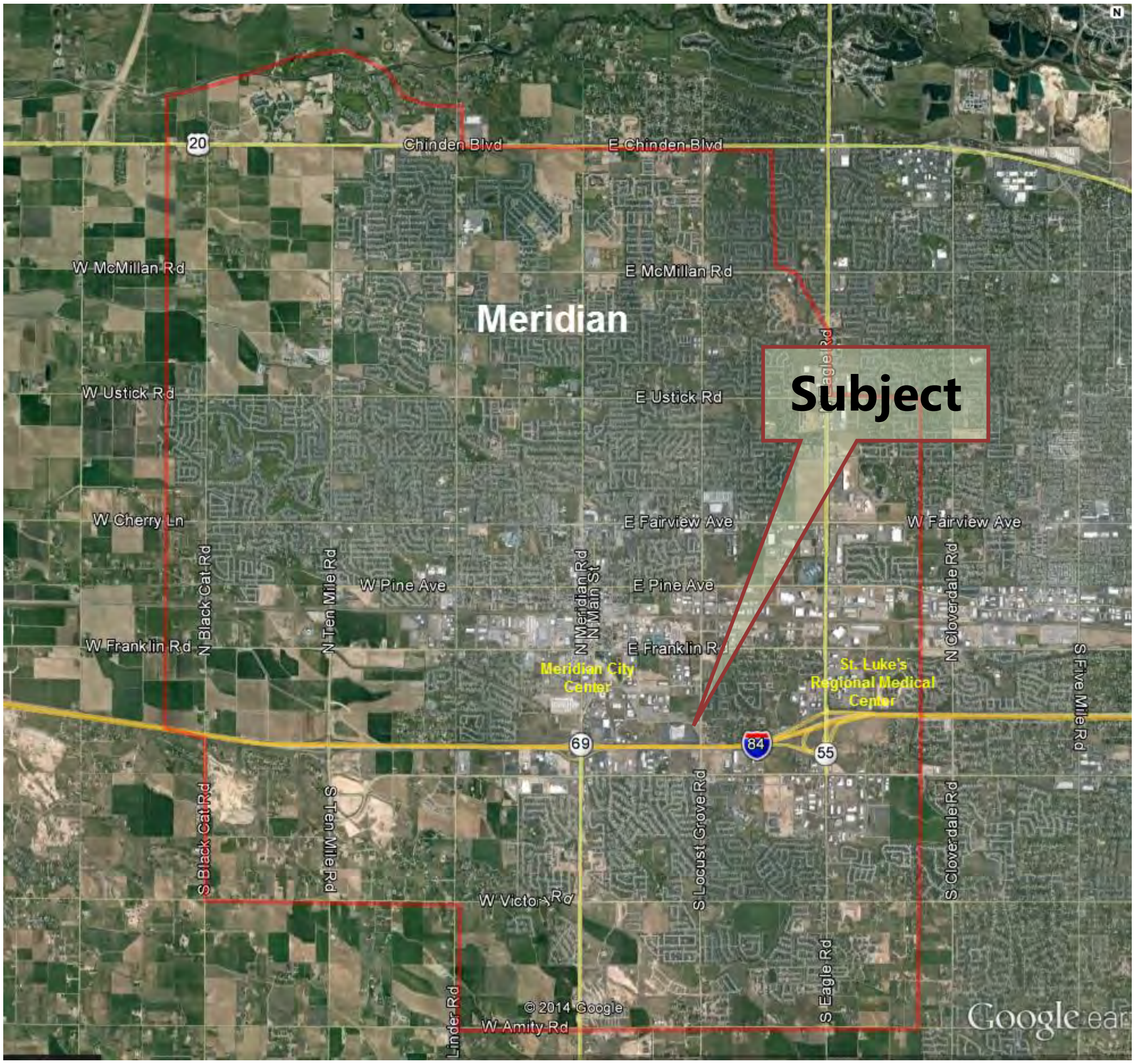
Transportation

Primary ground transportation access is via U.S. Interstate 84, which traverses east-west through the Boise MSA. I-84 is a major east-west Interstate in the region and connects the area with Idaho Falls, Pocatello, and Salt Lake City, Utah to the east; and Portland, Oregon to the west. The Boise Airport is the nearest international airport.

Conclusion

The long-term economic outlook for the Boise MSA (and Meridian) appears positive. Boise, as well as the Treasure Valley in general, is continually recognized by numerous publications as one of the best places to live in the country. The Boise MSA is the 3rd largest MSA in the northwestern U.S., behind Seattle and Portland. Meridian has been one of the fastest growing cities in the state during the past two decades. The population of Meridian and the Boise MSA in general are anticipated to continue to increase for the foreseeable future, albeit at a slower rate compared to the previous decade.

Neighborhood Aerial



Overview

The neighborhood boundaries are reasonably defined by the major commercial real estate firms within the local market. Vacancy, absorption, and supply data is tracked for each submarket within Ada and Canyon counties.

Meridian Submarket

The subject is located in the Meridian submarket. The neighborhood boundaries are generally defined by Chinden Boulevard to the north, Eagle Road and Cloverdale Road to the east, Victory Road and Amity Road to the south, and Black Cat Road to the west. Interstate access is from the Eagle Road, Meridian Road, and Ten Mile Road Interchanges located in south-central Meridian. The nearest major airport is the Boise Airport, located approximately eight miles southeast. Meridian's city center is located north of the Meridian Road/Interstate 84 Interchange. Boise's central business district is located approximately ten miles east.

Three major north-south arterials in the neighborhood include Eagle Road, Meridian Road, and Ten Mile Road. Eagle Road connects Interstate 84 with east Meridian/west Boise and Eagle. Eagle Road has the highest traffic counts in the State. Meridian Road connects downtown Meridian to Interstate 84 and the city of Kuna to the south. The Ten Mile Road Interchange was completed in 2012. The Ten Mile Road corridor is projected to be the next area to experience strong commercial growth. Four major east-west arterials include Fairview Avenue, Overland Road, Franklin Road, and Chinden Boulevard. Fairview Avenue bisects Meridian and connects Meridian to west Boise. Overland Road is located south of Interstate 84 and connects south Meridian and southwest Boise. Franklin Road bisects Meridian's city center. Chinden Boulevard extends along the northern boundary of the neighborhood and connects north Meridian and west and north Boise.

Numerous shopping centers are located in Meridian. CenterPoint Marketplace, Ustick Marketplace, and Gateway Marketplace are all located at the intersection of Eagle Road and Ustick Road. The centers are anchored by Lowe's, Kohl's, and Rosauers. The Eagle Island Center, anchored by Fred Meyer, opened in 2012 at the northeast corner of Chinden Boulevard and Linder Road. Home Depot, WinCo, and numerous national chain restaurants and retailers are located at the northeast corner of the Meridian Road Interchange. Meridian Crossroads, anchored by ShopKo and Walmart, is located at the southeast corner of Fairview Avenue and Eagle Road. The Village at Meridian is a new lifestyle center at the northeast corner of Fairview Avenue and Eagle Road. When fully complete, this commercial development will be one of the largest power centers in the state. Big Al's, Gordmans, Marshalls, and several national chain restaurants have recently opened in the center. The intersection of Eagle Road/Fairview Avenue has the highest traffic counts in the State.

Major employment centers are located throughout Meridian. North of Interstate 84 and Eagle Road is St. Luke's Meridian Medical Center. Located adjacent north of St. Luke's is Portico, a 24-acre mixed-use development. Construction within Portico began in 2008 and includes two 84,000 square foot medical office towers, one 134,000 professional office tower, and several retail and restaurant buildings. Located south of Interstate 84 along Overland Road are several quality commercial developments. Silverstone is a 160-acre business park developed in 2002. El Dorado is an 80-acre business park developed in 2003. Gramercy is a 70-acre commercial and residential development originally constructed in 2008. It is partially built-out. The 35-acre Scentsy campus was recently completed at the corner of Eagle Road and Pine Avenue.

The neighborhood includes a mix of approximately 70% residential, 15% commercial, and 15% undeveloped land. The commercial uses are further delineated as 55% office, 45% retail, and 5% industrial. Meridian is in a stage of growth, based on typical lifecycle stages of growth, stabilization, decline, and revitalization. Development within Meridian's downtown core initially began in the 1950 to 1960's. The core area has experienced development of infill parcels and renovation of many older properties during the past decade. Residential subdivision development was strong in the north and west portions of the neighborhood during the 1990's through the mid 2000's, as a result of strong population growth. Commercial development during the past two decades had also been strong along the neighborhood's arterial streets, particularly along the Eagle Road corridor. However, from 2008 through mid-2010, both residential and commercial development slowed significantly, as a result of the economic downturn. Since mid-to-late 2010, the economy has strengthened and both commercial and residential markets in Meridian have resumed new development. Construction has increased significantly since the recession years. The Eagle Road corridor remains one of the most attractive areas for commercial development in the Boise MSA.

Immediate Neighborhood Aerial

Immediate Neighborhood

The immediate neighborhood is generally bordered by Interstate-84 to the south, E. Franklin Road to the north, S. Meridian Road to the west, and S. Locust Grove Road to the east. Commercial development within the immediate neighborhood is primarily retail along the major arterial streets and a mix of office, office/flex, and office/warehouse uses throughout the neighborhood interior. A major retail center, anchored by Home Depot and Win-Co, is located at the northeast corner of Interstate 84 and Meridian Road. This retail center was constructed in the late 1990's. Commercial development surrounding this center was strong during the past decade as evidenced by numerous retail and restaurant buildings recently constructed in the area.

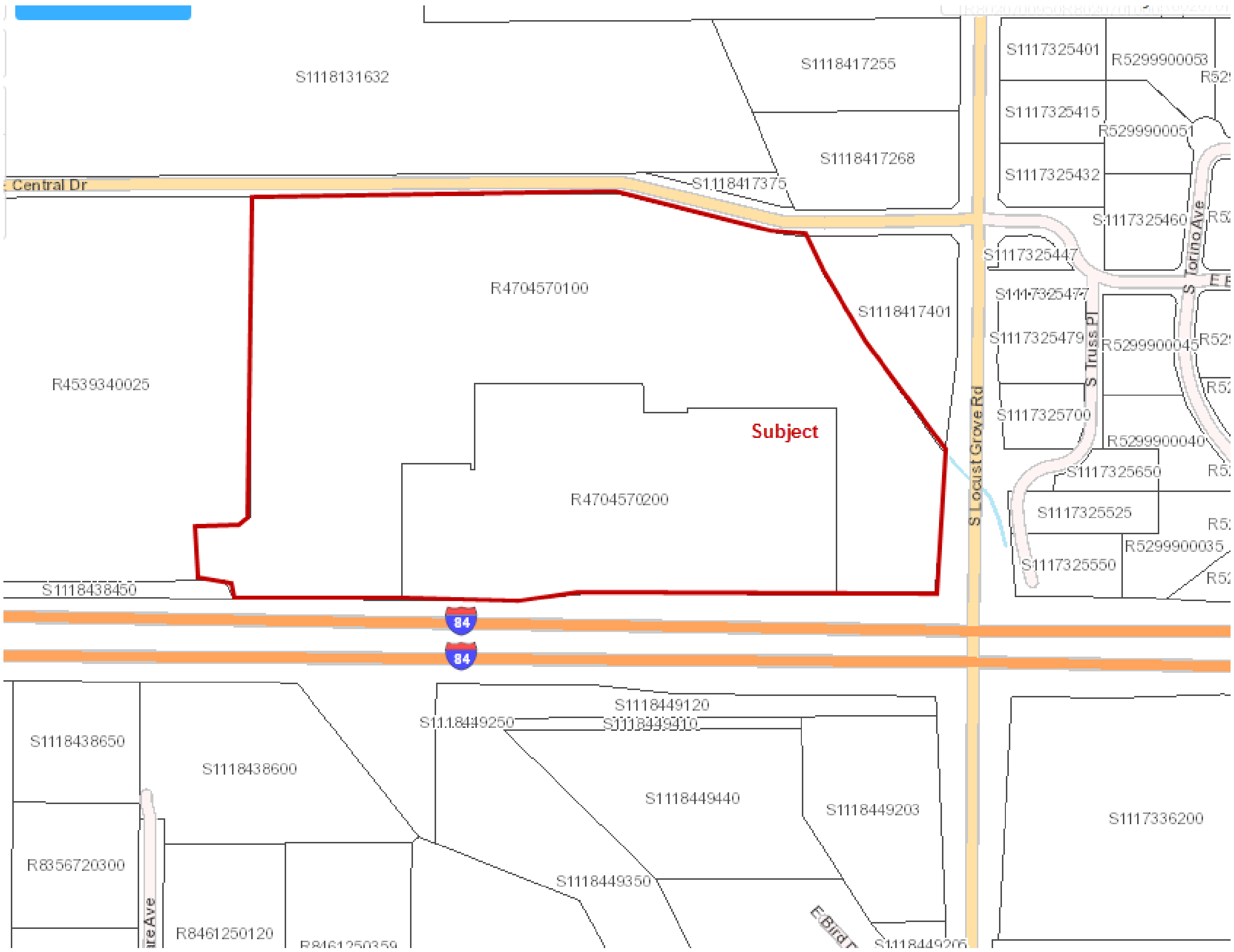
The subject is located approximately ½ mile east of the Meridian Road/Interstate 84 Interchange. It has freeway exposure and is accessed from a secondary interior street. Located north of the subject are the Idaho State Police Headquarters and older single-family homes. South is Interstate 84. East is an older residential subdivision. West is a 500,000 square foot building containing the Idaho State University-Meridian Campus, Renaissance High School, and West Ada School District offices.

Site Description

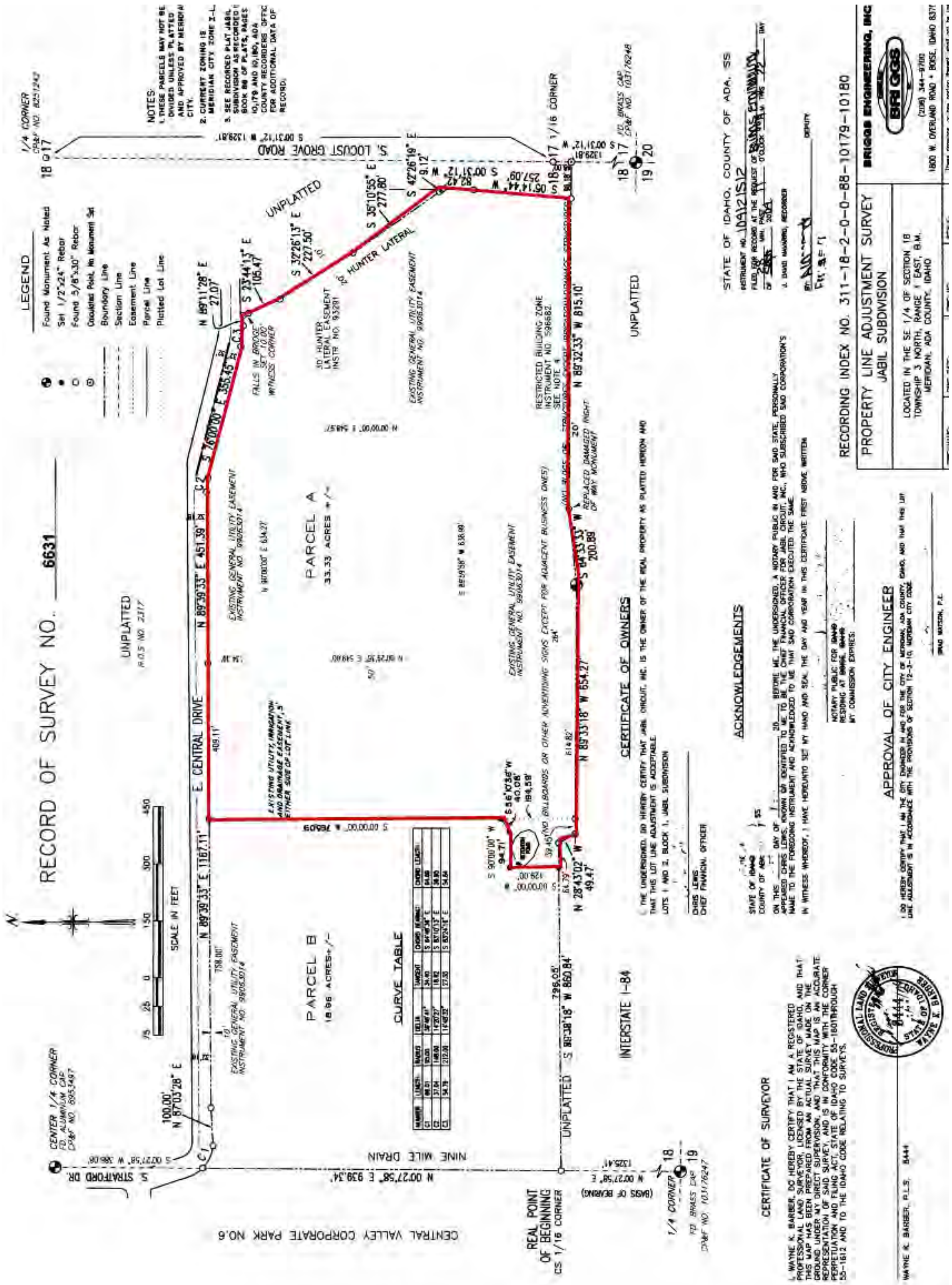
Assessor's Aerial Overlay
(Larger Parcel)

1303 E. CENTRAL DRIVE, MERIDIAN
SITE DESCRIPTION
ID02-16-0076-000

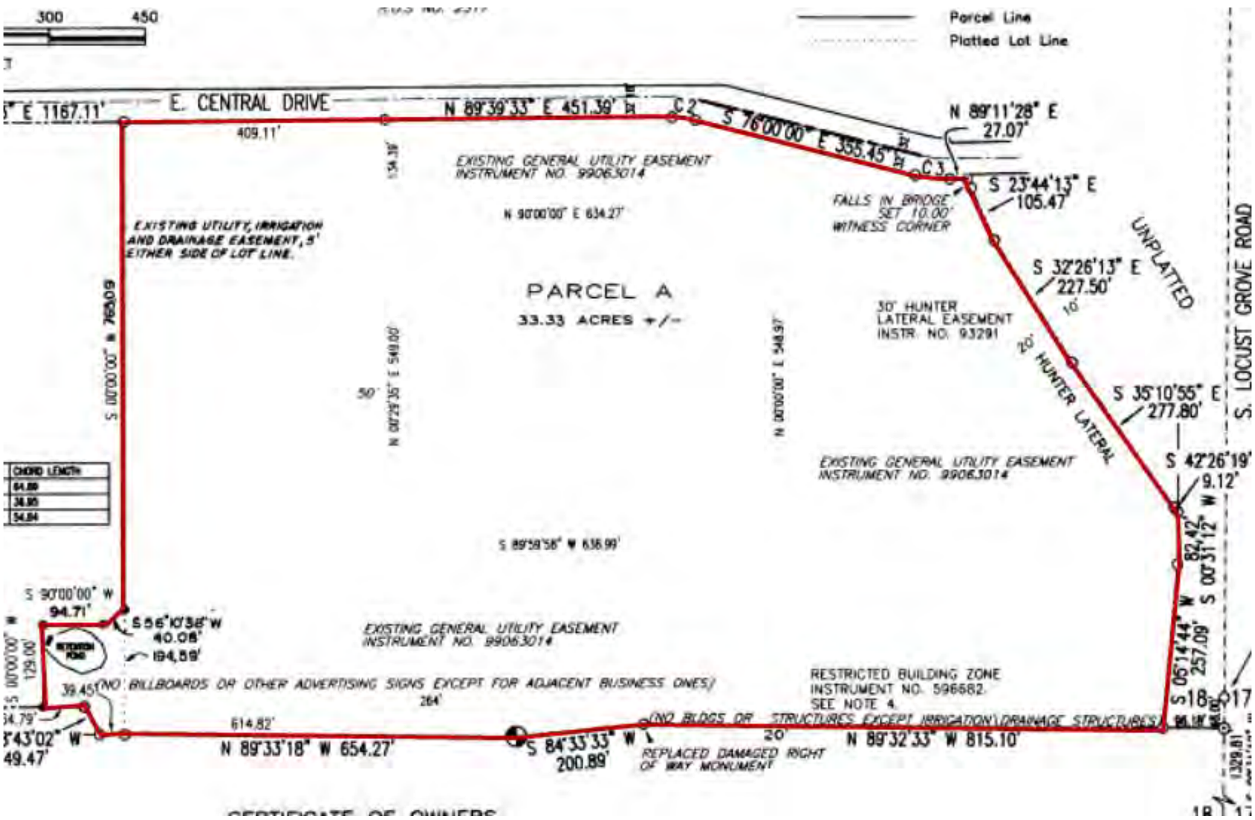
Assessor's Parcel Map
(Larger Parcel)



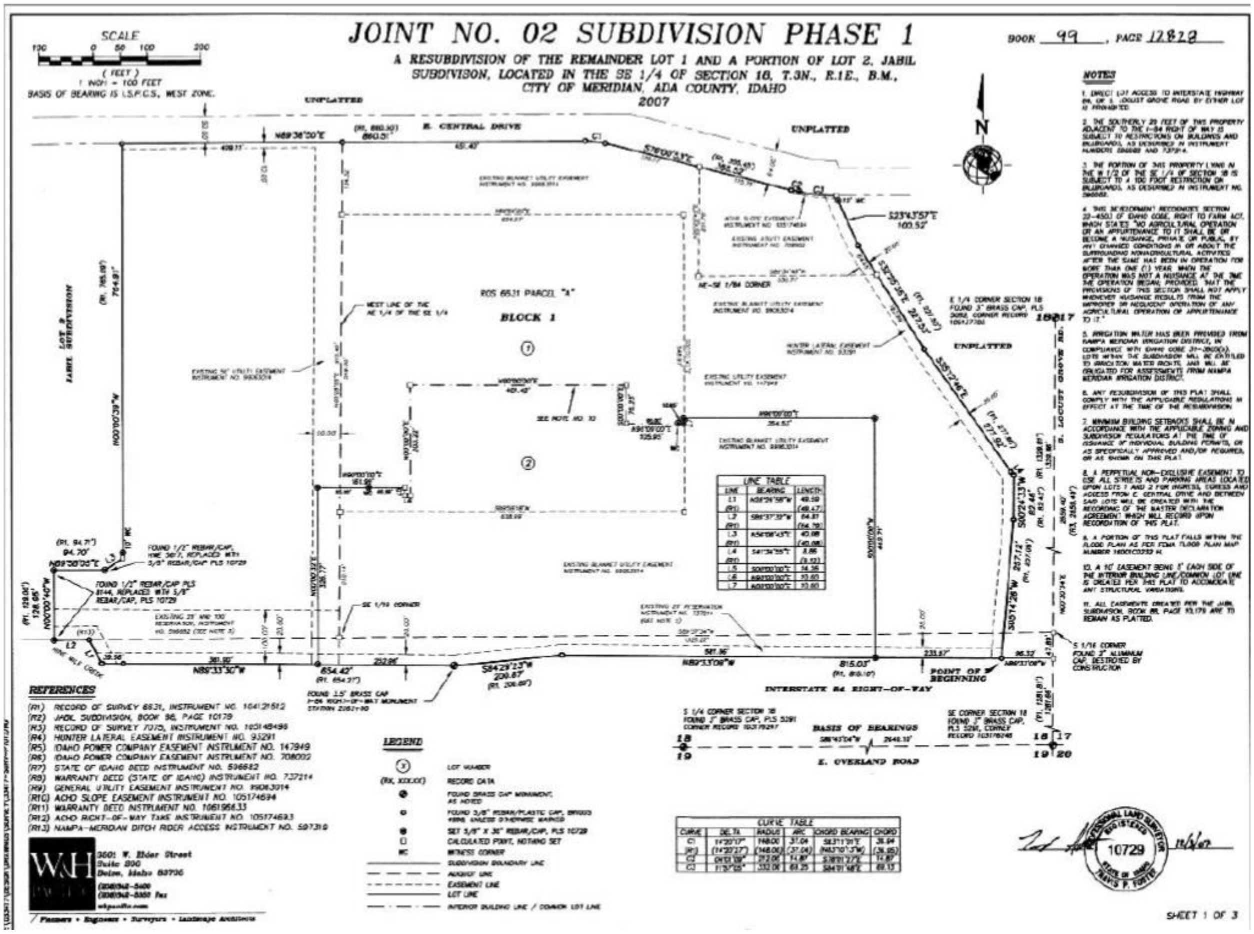
Record of Survey
(Larger Parcel)



Record of Survey
(Larger Parcel -close-up)



Subdivision Plat



General Data

Location: 1303 and 1311 E. Central Drive, Meridian, Idaho
Assessor Parcel Number(s): Portion of R4704570100 and R4704570200

Adjacent Land Uses

North: Idaho State Police Headquarters and single-family homes
South: Interstate 84
East: Single-family residential subdivision
West: West is a 500,000 square foot building containing the Idaho State University-Meridian Campus, Renaissance High School, and West Ada School District offices (part of subject's larger parcel).

Physical Characteristics

Site Area: Actual: 122,000 square feet; 2.80 acres
Effective: 241,947 square feet; 5.55 acres

Effective Land Area

Identification	Actual Lot Size (SF)	Actual Lot Size (AC)	Building Size (SF)	Land to Bldg Ratio	Effective Land to Bldg Ratio	Effective Land Area (SF)	Effective Land Area (AC)
Subject Pad Site	122,000	2.80	100,000	1.22	2.42	241,947	5.55
Balance of Larger Parcel	1,329,681	30.53	500,000	2.66	2.42	1,209,734	27.77
Totals	1,451,681	33.33	600,000	2.42	2.42	1,451,681	33.33

Land Size Determination: The larger parcel has ingress/egress and shared parking easements which impact the subject. The easements result in effective lot sizes which are different than actual. According to the preliminary site plan, the existing building has a gross building area of 500,000 square feet. The proposed building has a gross building area of 100,000 square feet. The effective lots sizes were calculated based on the overall land to building ratio for the larger parcel of 2.42:1. Land to building ratios for similar 2-3 story suburban buildings in the Ada County market typically range from 2:1 to 3:1. At 2.42:1, the subject's effective land to building ratio is within market norms for similar properties.
Usable Land Area: All of the land is usable.
Configuration: Nearly rectangular; overall functional
Topography: Generally level
Parcel Location: Interior siting with limited exposure from Interstate 84
Photographs of Subject: The photographs in the Addenda section provide additional clarification as to the "As Is" condition of the property.

Primary Access/Exposure

Street Name:	Access is from E. Central Drive.
Street Type:	Secondary, non-arterial street
At Signalized Intersection:	No
Overall Visibility:	The subject has limited Interstate 84 exposure. Interstate exposure is limited due to a high landscaping berm extending across the southern boundary of the subject. The Locust Grove Overpass further limits exposure from the west bound lanes.
Comments:	Access is rated average, but circuitous.

Site Improvements

Off-Site Improvements:	2-way, 2-lane roadway with center turn lane improved with asphalt paving, concrete curbing and sidewalks.
Utilities:	Standard utilities available to the property include municipal water and sewer services, electricity, natural gas, and telephone service.
On-Site Improvements:	Site improvements include asphalt paved parking, access drives, concrete curbing, parking lot lighting, and sprinkler irrigated landscaping.

Flood Zone Data

Flood Map Panel:	16001C0231H; 2/19/2003
Flood Zone:	The property is located within an "X" flood zone. The "X" flood zone is designated as outside a flood hazard area. Properties within an "X" flood zone are not required to carry flood insurance. The flood maps and definitions are located in the addenda of this report.

Other Site Conditions

Soils:	Subsoil and drainage appear adequate to support the existing use.
Environmental Issues:	During the property inspection, we did not observe any obvious environmental concerns. As real estate appraisers, we are not qualified to determine if any environmental hazards exist on the property, whether such hazards are obvious or not. Therefore, this appraisal assumes any environmental hazards to be nonexistent or minimal.
Easements & Restrictions:	The property is subject to the following known atypical easements or restrictions which were obtained from the subdivision plat and/or record of survey:

1) The property is subject to an existing restricted building zone which prohibits buildings and structures within 20 feet, and billboards or other advertising signs (except signs pertaining to business on adjacent property) within 100 feet of the right of way of 1-84. This easement does not preclude typical commercial development; thus, is considered a neutral easement.
2) The bottom of building footings shall be a minimum of 12 inches above the established normal high ground water

elevation. This easement is not likely to preclude typical commercial development; thus, is considered a neutral easement.

3) The larger parcel is subject to a perpetual non-exclusive easement to use all streets and parking areas for ingress, egress, and access from E. Central Drive. This easement is a beneficial easement to the subject site as it facilitates access and provides additional parking.

A title report was not provided in connection with this assignment. Based on our own observations, no other adverse easements or restrictions exist. This appraisal assumes only standard utility easements and governmental restrictions exist, none of which are assumed to impact value. An A.L.T.A survey is recommended if further assurance is needed. If questions arise regarding easements, encroachments, or other encumbrances, further research is advised.

Earthquake Zone: The subject is located within Earthquake Zone 2B, considered a moderate zone with respect to seismic activity.

Zoning Designation

Zoning Code: C-G: General Retail and Service Commercial District

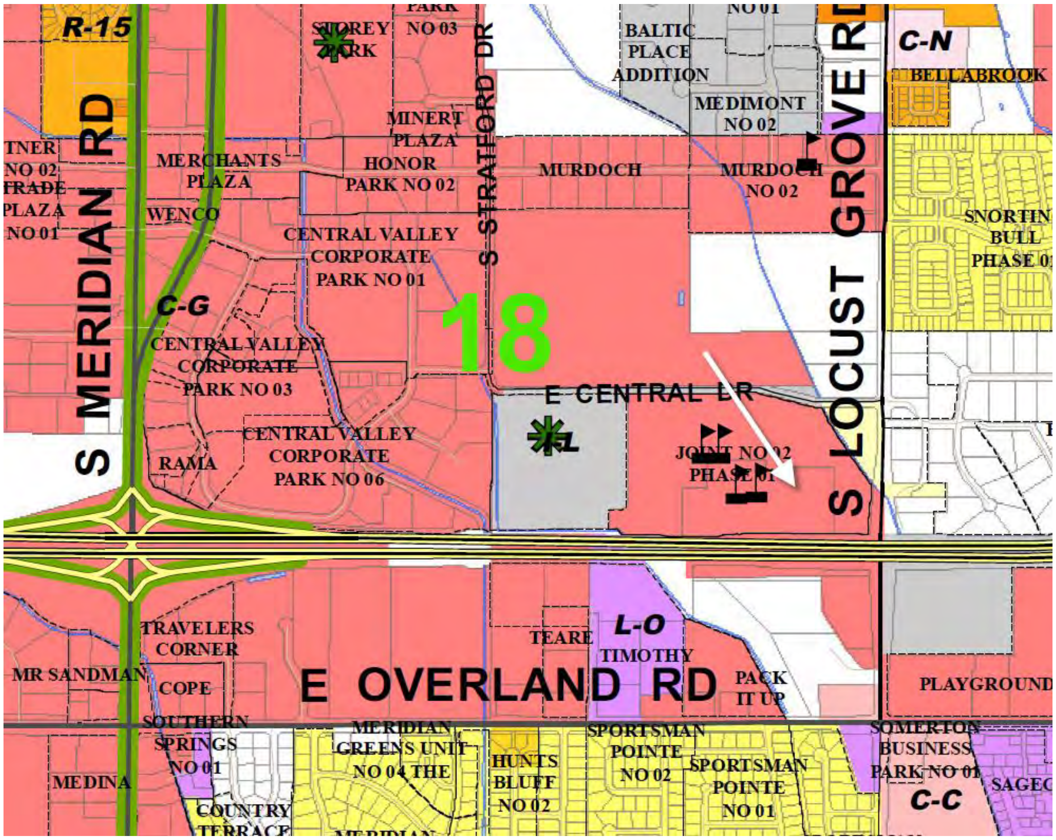
Zoning Jurisdiction: City of Meridian

Zoning Definition: According to Meridian City zoning, this zone is defined as "The purpose of the commercial districts is to provide for the retail and service needs of the community in accordance with the Meridian comprehensive plan. This district allows use on the largest scale and broadest mix of retail, office, service, and light industrial uses. Its designated location is for close proximity and/or access to interstate or arterial intersections.

Permitted Uses: This zoning allows for a wide range of office, flex, retail, and service commercial uses. Some light industrial uses are permitted via a conditional use permit.

Zoning Comments: The proposed education use is an allowable use.

Zoning Map



Parking Requirements

Parking District:	General
Zoning Required Parking:	1 space per 500 sf of gross floor area; 1,200 spaces
On-site Parking:	1,250 spaces
Parking Conclusions:	The subject meets zoning requirements. Note, the rentable building areas for the existing and proposed buildings are unknown or undetermined. Current parking meets market requirements for the existing building; however, it is undetermined if current parking would be suffice to meet market requirements as proposed.

Site Rating

Location:	Good
Access:	Average, but circuitous
Exposure:	Limited Interstate 84 exposure
Functional Utility:	Average
Overall Site:	Average to good

Assessment & Tax Data

Assessed Value and Real Estate Taxes

The subject is exempt from county assessment and taxation.

Highest & Best Use

The highest and best use analysis prepares the foundation for valuing a property. It is a one-step process for valuing unimproved land and a two-step process for valuing an improved property. The first step is the same for valuing both unimproved property and an improved property. It involves determining the best use of the land as though vacant; whether the property should remain unimproved or be improved, and if improved, with what. The second step is only necessary for determining the highest and best use of an improved property. It involves determining if the improvements should remain in their present form or be altered. The definition of highest and best use is as follows:

> *"The reasonably probable and legal use of vacant land or an improved property, which is physically possible, appropriately supported, financially feasible, and that results in the highest value". The four criteria the highest and best use must meet are legal permissibility, physical possibility, financial feasibility, and maximum profitability".*[1]

Highest and Best Use, As If Vacant /As Vacant

Legally Permissible: The property's C-G zoning allows for a wide range of office, flex, retail, and service commercial uses. Some light industrial uses are permitted via a conditional use permit. We are not aware of any other land use regulations that would limit the use of the property. There are no known easements, encroachments, covenants or other use restrictions that would unduly limit or impede development of a probable nature. Considering the larger parcel is developed with a University Campus and other educational uses, only educational or supporting office uses are given further consideration in determining highest and best use as if vacant.

Physically Possible: As evidenced by the physical characteristics of the property, including its size, configuration, accessibility and availability of public utilities, all of the legally permissible uses could be developed on the land. The site does not have any physical characteristics that would hinder typical development.

Financially Feasible: The next step determines if those legally permissible and physically possible uses are also financially feasible. Statistics indicate moderate and improving demand across all commercial markets, characterized by declining vacancy (at several year lows), significant positive net absorption, limited new construction, and increasing lease rates. Near-term, due to a shrinking supply and lack of new construction, vacancy is anticipated to continue to decline, and lease rates are anticipated to continue to moderately increase. In general, speculative development continues to be marginally financially feasible as market rents have yet to fully recover from recession levels. Market value, if built, may be less than the cost to construct plus current land value.

Maximally Productive: The final test of maximum productivity is now applied to the uses that have passed the first three tests. Of the financially feasible uses, the maximally productive use is the use that produces the highest residual land value. Considering the aforementioned factors, the maximally productive, and therefore highest and best use, as if vacant/as vacant, is for the development of an educational or supporting office use when market conditions warrant development. A feasibility analysis would be required to determine the ideal improvement to be developed on the land.

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[1] Appraisal Institute, *The Dictionary of Real Estate Appraisal,* 3rd Ed., (Chicago, Illinois, 1993), page 171.

Most Probable Buyer/User

The subject is a 2.80 acre pad site (5.55 acre effective site). The most-probable buyer is an owner-occupant.

Appraisal Methodology

Approaches to Value

There are three traditional approaches typically available to develop indications of real property value: the Cost, Sales Comparison, and Income Capitalization Approaches.

Cost Approach - The Cost Approach is based upon the principle of substitution, which states that a prudent purchaser would not pay more for a property than the amount required to purchase a similar site and construct similar improvements without undue delay, producing a property of equal desirability and utility. For proposed or new facilities that have suffered little or no depreciation, this approach is meaningful, though it is rarely used by investors.

Sales Comparison Approach – The Sales Comparison Approach involves the direct comparison of sales and listings of similar properties, adjusting for differences between the subject property and the comparable properties. It is based on the Principle of Substitution. This principle states that no one would pay more for the subject than the value of a similar property in the market. In active markets with a large number of physically similar comparables, this approach is generally considered to be a good indicator of value. However, the use of this approach is limited, because many properties have unique characteristics that cannot be accounted for in the adjustment process. In addition, market data is not always available. Both of these factors may reduce the validity of this approach. This is often a secondary approach for income-producing properties.

Income Capitalization Approach - The Income Capitalization Approach is based on the principle of anticipation, or the assumption that value is created by the expectation of benefits to be derived in the future, such as expected future income flows including the reversion, or future resale of the property appraised. Its premise is that a prudent investor will pay no more for the property than he or she would for another investment of similar risk and cash flow characteristics.

Subject Valuation

Market Value: As Is - The Sales Comparison Approach was employed to estimate market value for the subject. The Income Capitalization Approach and the Cost Approach were not completed; they are not applicable for land valuation in this market.

Market Rent: Our opinion of market rent for the subject site was estimated based on market comparables of ground leases in the local market.

Valuation - Market Value: As Is
Sales Comparison Approach

Methodology

This approach is based on the premise that a buyer would pay no more for a specific property than the cost of obtaining a property with the same quality, utility, and perceived benefits of ownership. In this approach, an indication of market value is developed by analyzing closed sales, listings, or pending sales of properties similar to the subject property, using the most relevant units of comparison. The primary unit of comparison selected depends on the appraisal problem and nature of the property. The primary unit of comparison in the market for properties similar to the subject is price per square foot. A systematic procedure for applying the Sales Comparison Approach includes the following steps:

1. Research and verify transactional data to produce an adequate, reliable data set.
2. Select a relevant unit of comparison.
3. Analyze and adjust the comparable sales for differences in various elements of comparison and physical/location characteristics.
4. Reconcile the sales into an indication of value for the subject.

Comparable Selection:

The subject site is 5.55 acres (effective size) of commercial land located in Meridian. A search was made for recent sales of reasonably similar sites in proximity to the subject, with an emphasis placed on location, size, and zoning/highest and best use. Eight comparables were selected for the analysis. Six are confirmed sales of competing properties; two are current listings of properties located near the subject. The comparables are located in Meridian, and nearby Boise and Nampa.

Elements of Comparison:

The land adjustment analysis uses market based data from paired-sales, construction costs for site improvements, or other market indicators. In instances where there is limited market data available, the adjustment is based on the appraiser's estimate of market reaction.

Real Property Rights Conveyed - This adjustment considers real property rights relating to a property, such as a lease contract or deed restrictions

All of the sales were fee simple sales. Thus, no adjustments were warranted.

Financing Terms - This adjustment category considers payment terms. Favorable or unfavorable financing terms warrant adjustment versus cash or cash equivalent.

All of the sales were cash equivalent sales. Thus, no adjustments were warranted.

Conditions of Sale - This adjustment category considers the impact to a property's sale price attributable to atypical buyer or seller motivation.

All of the sales were typically motivated, arms-length sales. Thus, no adjustments were warranted.

Expenditures After Purchase - This adjustment category considers significant expenditures made upon purchase; these costs affect the price or value of the property at sale.

Thus, no adjustments were warranted.

Non-Realty Components - This adjustment category considers personal property and trade fixtures which were included in the sale.

None of the sales included personal property. Thus, no adjustments were warranted.

Market Conditions - This adjustment category considers property sale price changes due to changing market conditions over time. If the market is stable, no adjustment is necessary. However, if the market has appreciated or depreciated, an adjustment is necessary.

Commercial development land sale prices throughout Ada County declined significantly from January 2008 through mid-2010. Market conditions began to stabilize in mid-2010 and remained generally flat through 2011. Since 2012, commercial market fundaments have improved moderately as evidenced by declining vacancies and capitalization rates and increasing rental rates. Demand for well-located commercial land has also increased as evidenced by an increase in transactions and new construction. Locations similar to the subject have exhibited moderate appreciation since 2012, estimated herein +3% per year from 2012 through 2013, and +5% per year beginning in 2014 to-date. The market conditions estimate was based on paired sales, although limited, and supported by several interviews with market participants.

Location - This category considers value differences as a function of location qualities, desirability, and accessibility. This category also considers primary arterial frontage locations versus secondary arterial or second tier non-frontage locations. This is typically measured by differences in land values via paired land sales, or differences in property values as a result of rent differences and/or capitalization rate differences.

Locational differences were applied by three separate adjustments: 1) Immediate neighborhood, 2) Arterial street or freeway exposure, and 3) Access. The subject's immediate neighborhood is rated good. It is located in Meridian, adjacent to newer commercial development and a freeway interchange. The subject has limited Interstate 84 exposure. Interstate exposure is limited due to a high landscaping berm extending across the southern boundary of the subject. The Locust Grove Overpass further limits exposure from the west bound lanes. Access is circuitous from a secondary, non-arterial street.

Comparables 3 and 4 are inferior to the subject for immediate neighborhood influences. Comparable 3 is located in an inferior light industrial/commercial neighborhood. Comparable 4 is located further from development and services. Upward adjustments of 20% were applied. Comparables 1, 5, and 6 are superior to the subject. Comparable 1 is located adjacent to the Eagle Road corridor in a quality medical/office neighborhood. Comparables 5 and 6 are superior retail oriented locations adjacent to newer shopping centers. Downward adjustments ranging from -10% to -20% were applied. Comparables 1, 7, and 8 have interior locations with no arterial street exposure. Upward adjustments of 10% were applied. Comparables 2-6 have superior arterial street or freeway exposure. Downward adjustments of 5% were warranted. Comparables 1-6 and 8 are superior to the subject for access. Downward adjustments of 10% were applied.

Zoning/Use - This category considers value differences associated with variances in zoning designations or uses allowed.

Any perceived value differences attributable to zoning were considered as a part of the location adjustment. No additional adjustments were warranted.

Size - This category considers value differences resulting from variances in property size. In general, smaller parcels exhibit higher sale prices per square foot (or per acre) versus larger parcels.

Comparables 1, 7, and 8 are moderately smaller than the subject, warranting adjustment. Downward adjustments of 10% were applied.

Configuration - This category considers differences in land use or value associated with property configuration. Irregular parcels typically have lower price per square foot sales prices versus rectangular parcels due to less functional utility.

Comparables 4 and 5 have irregular configurations resulting in less functional utility versus the subject. Upward adjustments of 10% were applied.

Topography - This category considers differences in land use or value associated with property topography. Commercial parcels with uneven topographies typically have lower price per square foot sale prices because the cost to develop is greater versus a level parcel.

All of the comparables have generally level topographies similar to the subject. Thus, no adjustments were warranted.

Utilities: Water and Sewer - This category considers the availability of city water and sewer services to the property.

All of the comparables are similar to the subject for utilities. Thus, no adjustments were warranted.

Site Improvements - This adjustment category considers value differences as a result of site improvements located on a property.

None of the comparables had site improvements associated with the sale price. Thus, no adjustments were warranted.

Other - This category accounts for any atypical issues.

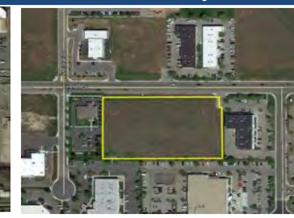
No adjustments were warranted.

Presentation

Presented on the following pages are the Land Sale Comparable Summation Table, Sale Comparable Map, the discussion and analysis of the comparables, and conclusion(s) of market value for the subject.

Land Sale Comparable Summation Table



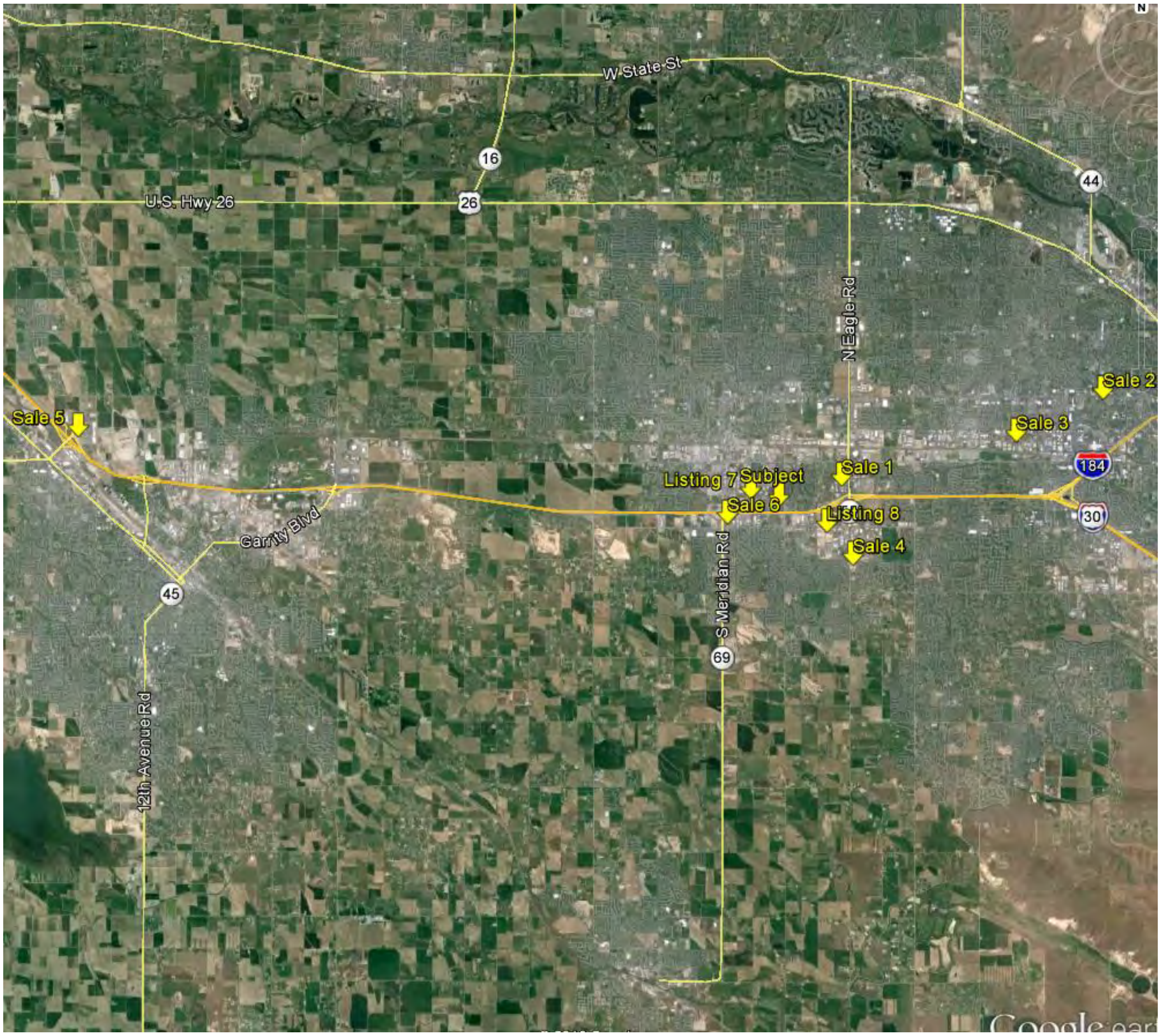





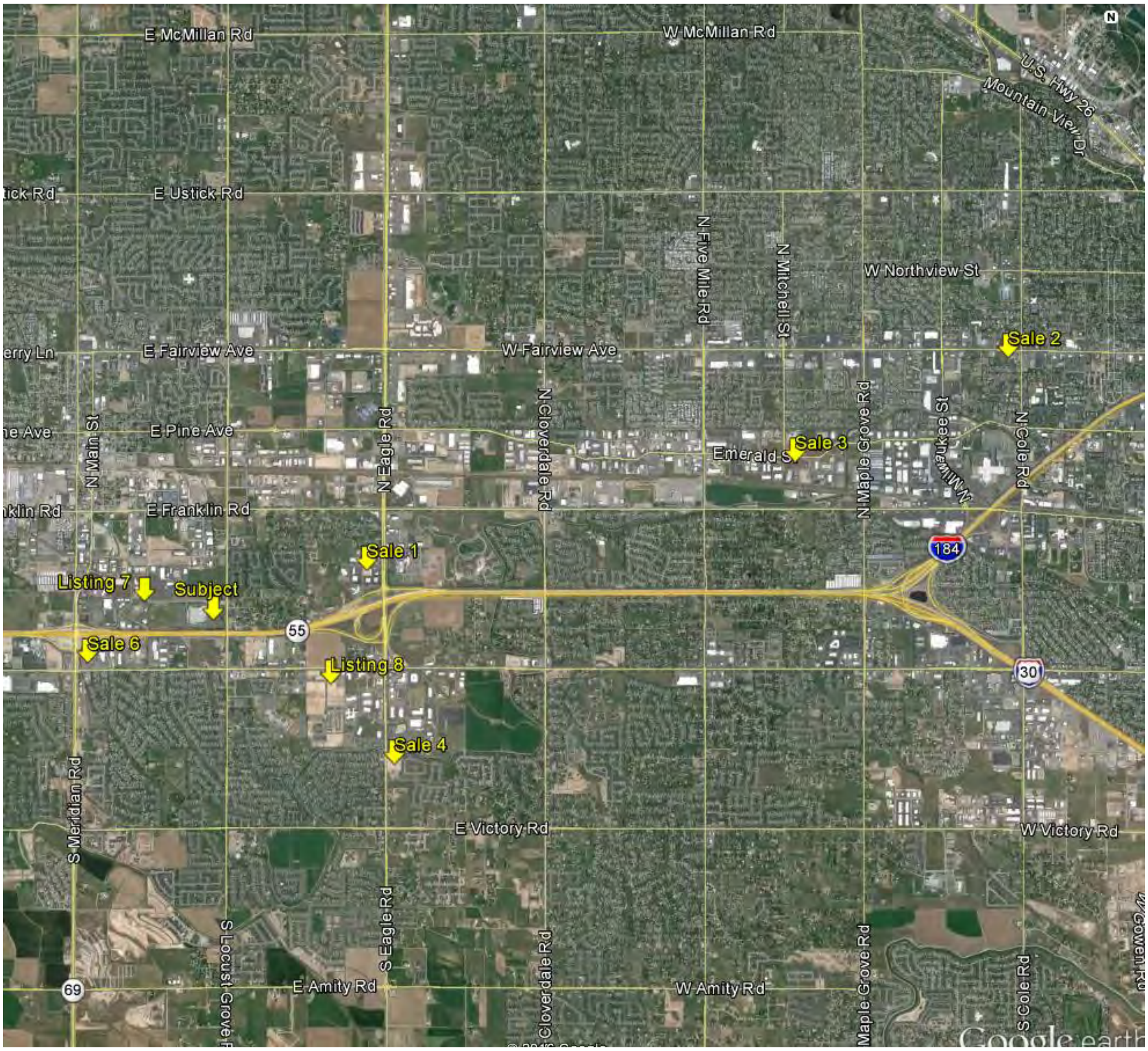

Location	Subject	1	2	3	4	5	6	7 (Listing)	8 (Listing)
Name	Proposed ICOM Building Site		Former Cole Elementary Site			NEC Interstate 84 & Midland Blvd	NEC S. Meridian Rd. & Overland Rd.		Gramercy
Address	1303 and 1311 E. Central Drive	3015 E. Magic View Dr.	7415 W. Fairview Ave. & 1487 N. Cole Rd.	9601 W. Emerald St.	2590 S. Eagle Road	16315 N. Midland Blvd.	112-178 E. Overland Rd.	701 E. Central Dr.	2667 E. Gala Ct.
City & state	Meridian, Idaho 83642	Meridian, Idaho	Boise, Idaho	Boise, Idaho	Meridian, Idaho	Nampa, ID	Meridian, Idaho	Meridian, Idaho	Meridian, Idaho
Parcel No.	Portion of R4704570100 and R4704570200	R1532240040	S1112110505, S1112110307	R1573670454	S1121325785 & S1121325535	R2258901000	R1564200010, 20, 30, 40	R1343550950	R3238510190
Property description									
Gross land size (Acre)	2.80	1.44	7.63	3.64	4.80	6.04	4.31	1.35	2.00
Gross land size (sf)	122,000	62,814	332,450	158,558	209,088	263,102	187,874	58,632	87,076
Unusable or effective (sf)	119,947	0	0.00	0	(28,000)	0.00	(27,000)	(5,000)	0.00
Usable land size (usf)	241,947	62,814	332,450	158,558	181,088	263,102	160,874	53,632	87,076
Land type	Commercial	Office	Commercial	Office	Office	Commercial	Retail/office/commercial	Office	Office
Zoning	C-G	C-G	A-1 & C-2D (future C-2D)	M-1D	R-4 (to be rezoned C-C)	BC	C-G	C-G	C-G
Land use at sale	n/a	Vacant	Vacant (former school site)	Vacant	Vacant	Vacant	Vacant	Vacant	Vacant
Buyer's intended use	n/a	Medical office	Maverick Station on hard corner	Office	Citadel Storage	C-store and hotel	Expansion for auto dealership	n/a	n/a
Configuration	Nearly rectangular; functional	Rectangular	Rectangular	Rectangular	Slightly irregular	Irregular	Nearly rectangular	Nearly rectangular	Rectangular
Topography	Level	Level	Level	Level	Level	Level	Level	Level	Level
Utilities: Water & Sewer	City water & sewer	City water & sewer	City water & sewer	City water & sewer	City water & sewer	City water & sewer	City water & sewer	City water & sewer	City water & sewer
Site improvements	Not included	None	None	None	None	None	None	None	None
Sale description									
Data source	n/a	JV: Lawrence Ross of Michener	JV: Michael Ballantyne @ TOK	JV: TOK data sheet	Angie Emmons: TOK	Craig Lindquist	Seller: Ron Van Auker	TOK Listing	TOK Listing
Seller	n/a	Imaging Center Radiologists LLP	Boise Independent School District	WH More Company	James Brunel	4D Arena LLC	Ron Van Auker	n/a	n/a
Buyer	n/a	DOCRE LLC	Maverick Inc.	FiberPipe	C4 Land LLC	G&G Inv. General Partners	Meridian Auto Mall	n/a	n/a
Marketing time	12 months	Several years	Call for offers	Several years	Unk	Unk	Unk	Unk	Several years
Sale date	Eff. date of appraisal (4/16)	6/15	1/15	10/14	4/14	1/13	9/12	4/16 Listing	4/16 Listing
Price	n/a	$700,000	$2,500,000	$900,000	$940,000	$2,400,000	$1,408,077	$366,449	$727,110
Financing terms	Cash	Cash	Cash	Cash	Cash	Cash	Cash	Cash	Cash
Conditions of sale	Typical arms-length	Typical arms-length	Typical arms-length	Typical arm's length	Typical arms-length	Typical arms-length	Typical arms-length	Typical arms-length	Typical arms-length
Non-realty components	None	None	None	None	None	None	None	None	None
Comments	Limited Interstate 84 exposure; access is circuitous	Interior site with no arterial street visibility; listed for several years at $980,000 ($15.60/sf)	Sold at appraised value		The unusable area is that portion of the irrigation canal extending across the northernmost portion of the property; purchased with intent to develop 506-unit self-storage facility	Located adjacent to the Treasure Valley Marketplace power center	Unusable land is that portion of the Ten Mile Drain easement; sale price stated by seller at $7.50 per gross square foot; psf sale price below based on usable area; arterial corner	Unusable area is that portion of Nine Mile Creek extending along the east boundary	
Financial indicators									
Price/usf		$11.14	$7.52	$5.68	$5.19	$9.12	$8.75	$6.83	$8.35

Adjustments	Subject	Adjustment notes	1		2		3		4		5		6		7 (Listing)		8 (Listing)	
Real Property Rights Conveyed	Fee Simple	No adjust. necessary	Fee Simple	0%	Fee Simple	0%	Fee Simple	0%	Fee Simple	0%	Fee Simple	0%	Fee Simple	0%	Fee Simple	0%	Fee Simple	0%
Adjusted sale price				$11.14		$7.52		$5.68		$5.19		$9.12		$8.75		$6.83		$8.35
Financing terms	Cash	No adjust. necessary	Cash	0%	Cash	0%	Cash	0%	Cash	0%	Cash	0%	Cash	0%	Cash	0%	Cash	0%
Adjusted sale price				$11.14		$7.52		$5.68		$5.19		$9.12		$8.75		$6.83		$8.35
Conditions of sale	Typical arms-length	No adjust. necessary	Typical arms-length	0%	Typical arms-length	0%	Typical arm's length	0%	Typical arms-length	0%	Typical arms-length	0%	Typical arms-length	0%	Typical arms-length	0%	Typical arms-length	0%
Adjusted sale price				$11.14		$7.52		$5.68		$5.19		$9.12		$8.75		$6.83		$8.35
Expenditures after purchase	n/a	No adjust. necessary	n/a	0%	n/a	0%	n/a	0%	n/a	0%	n/a	0%	n/a	0%	n/a	0%	n/a	0%
Adjusted sale price				$11.14		$7.52		$5.68		$5.19		$9.12		$8.75		$6.83		$8.35
Non-realty components	None	No adjust. necessary	None	0%	None	0%	None	0%	None	0%	None	0%	None	0%	None	0%	None	0%
Adjusted sale price				$11.14		$7.52		$5.68		$5.19		$9.12		$8.75		$6.83		$8.35
Market conditions (time)	Eff. date of appraisal (4/16)	+3%/yr 2012-2013; +5%/yr to date	6/15	4%	1/15	6%	10/14	7%	4/14	10%	1/13	14%	9/12	15%	4/16 Listing	-5%	4/16 Listing	-5%
Adjusted sale price				$11.56		$7.96		$6.08		$5.69		$10.40		$10.07		$6.49		$7.93
Location: Immediate neighborhood	Good	Paired-sales	Superior	-20%	Similar	0%	Inferior	20%	Inferior	20%	Superior	-20%	Superior	-10%	Similar	0%	Similar	0%
Location: Exposure	Limited Interstate exposure	Paired-sales	Inferior	10%	Superior	-5%	Superior	-5%	Superior	-5%	Superior	-5%	Superior	-5%	Inferior	10%	Inferior	10%
Location: Access	Average (but circuitous)	Paired-sales	Superior	-10%	Superior	-10%	Superior	-10%	Superior	-10%	Superior	-10%	Superior	-10%	Similar	0%	Superior	-10%
Zoning/Use	C-G	Part of location adj.	C-G	0%	A-1 & C-2D (future C-2D)	0%	M-1D	0%	R-4 (to be rezoned C-C)	0%	BC	0%	C-G	0%	C-G	0%	C-G	0%
Usable land size	5.55	Paired-sales	1.44	-10%	7.63	0%	3.64	0%	4.16	0%	6.04	0%	3.69	0%	1.23	-10%	2.00	-10%
Configuration	Nearly rectangular; functional	Paired-sales	Rectangular	0%	Rectangular	0%	Rectangular	0%	Slightly irregular	10%	Irregular	10%	Nearly rectangular	0%	Nearly rectangular	0%	Rectangular	0%
Topography	Level	No adjust. necessary	Level	0%	Level	0%	Level	0%	Level	0%	Level	0%	Level	0%	Level	0%	Level	0%
Utilities: Water & Sewer	City water & sewer	No adjust. necessary	City water & sewer	0%	City water & sewer	0%	City water & sewer	0%	City water & sewer	0%	City water & sewer	0%	City water & sewer	0%	City water & sewer	0%	City water & sewer	0%
Site improvements	Not included	No adjust. necessary	None	0%	None	0%	None	0%	None	0%	None	0%	None	0%	None	0%	None	0%
Other		No adjust. necessary		0%		0%		0%		0%		0%		0%		0%		0%
Net adjustment				-30%		-15%		5%		15%		-25%		-25%		0%		-10%
Indicated subject value (usf)				**$8.09**		**$6.76**		**$6.38**		**$6.54**		**$7.80**		**$7.55**		**$6.49**		**$7.14**

Land Sale Comparable Map

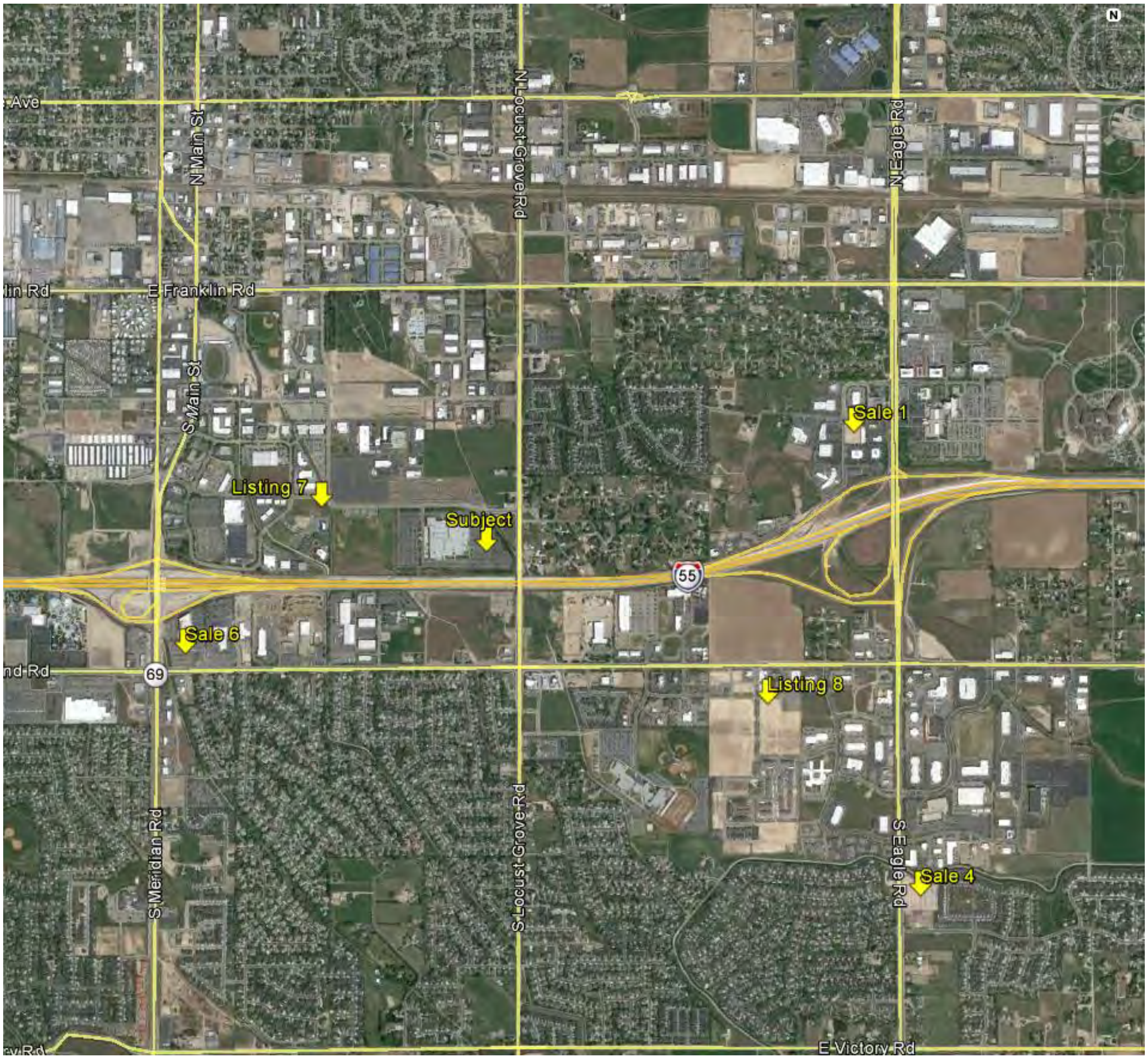


Land Sale Comparable Map
(Ada County)



Land Sale Comparable Map
(Nampa)

Land Sale Comparable Map
(Immediate Neighborhood)



Comparable Analysis

Prior to adjustment, the comparable prices ranged from $5.19 to $11.14 per square foot. The price differences are primarily attributable to date of sale, location, configuration, and size. Comparable 4 represents the lower-tier of the range. It is inferior to the subject for location and configuration. Comparable 1 represents the upper-tier of the range. It is a smaller site superior to the subject for location. After adjustment, the comparables bracket market value for the subject in a range of $6.49 to $8.09, with an average of $7.10 per square foot. Considering such factors as size, exposure, access, and immediate neighborhood, **market value for the subject's underlying land is concluded at $6.75 per square foot**. The market value indication table is presented following, which ranks the comparable sales in relation to the subject.

Market Value Indication

Comp #	Value Indication	Price/SF
1	Less than	$8.09
5	Less than	$7.80
6	Less than	$7.55
8	Less than	$7.14
2	Similar	$6.76
Subject	**Indicated Value**	**$6.75**
4	More than	$6.54
7	More than	$6.49
3	More than	$6.38

Contributory Value of the Site Improvements: The subject site (effective land area) is currently utilized as a parking lot. Site improvements include asphalt paved parking, access drives, concrete curbing, parking lot lighting, and sprinkler irrigated landscaping. The pad site area is 122,000 square feet. An estimated 50% or 61,000 square feet of the site improvements in this area will be razed upon development. The cost to raze the site improvements is estimated at $0.50 per square foot. The existing site improvements on the balance of the subject's effective site area, or 180,947 square feet will remain in place to support the future building. The contributory value of the site improvements was determined by depreciated cost. Cost new of the site improvements is estimated at $4.00 per square foot. With an estimated 10 year effective age and an estimated 30 year useful life, depreciation is estimated at 33% (10/30). As a result, the contributory value of the site improvements is estimated at $2.67 per square foot of the improved area.

Market Value Conclusion

With considerations regarding land value, contributory value of the site improvements, and costs to ready the site for development, market value for the subject is calculated as follows:

Sales Comparison Approach Conclusion

Size (effective sf)	x	Value/sf	= Market Value
241,947	x	$6.75	$1,633,142

Sales Comparison Approach Conclusion, Land Value Conclusion, rounded	**$1,635,000**
Add: Contributory value of site improvements (180,947 sf x $2.67/sf)	**$483,128**
Less: Cost to raze site improvements on pad site (61,000 sf x $0.50/sf)	**($30,500)**
Total	**$2,087,628**
Market Value: As Is, rounded	**$2,090,000**

Final Value Conclusion – Market Value: As Is

Value Conclusion Summary

Our value conclusion is summarized in the table presented below.

Value Conclusion(s)

Value Type	Value Premise	Interest Appraised	Effective Date	Value Conclusion
Market Value	As Is	Fee Simple	4/7/2016	$2,090,000

The **Sales Comparison Approach** resulted in a reliable conclusion of market value due to an adequate number of recent sales of similar commercial sites located within competing areas of the local market. The Sales Comparison Approach is an applicable approach for valuing land in this market and is the primarily analytical method used by market participants. The contributory value of the site improvements were added to the underlying land value, resulting in a reliable conclusions of “as is” market value.

The **Income Capitalization Approach** and the **Cost Approach** were not completed; they are not applicable for land valuation in this market.

Marketing Time: Marketing time is the time frame subsequent to the effective date of appraisal necessary to affect a sale of the property at the estimate of value(s) detailed herein. The estimate of value in this appraisal assumes the subject would experience a marketing time typical of the current market. Marketing time estimates can be supported by analyzing the actual time the comparable sales utilized in the valuation analysis were exposed to the market before they sold. Historically, development land transactions have been relatively stable within the regional market. Prior to 2008, the marketing time was typically 6 to 12 months. However, transactions were limited beginning in 2008 through mid-2010 as a result of the economic downturn and the tightening of lending guidelines, which has reduced both the amount of available capital and the number of potential buyers. Distressed sales were prevalent during this time for development land; however, these sales are not true indications of market value. Since mid-to-late 2010, both the national and local economies have strengthened and residential and commercial market conditions have improved. As a result, the commercial land market has stabilized, particularly for well-located properties, as evidenced by stable to appreciating land values and increasing transaction activity. Market conditions are anticipated to continue to improve near term. With this emphasis, and considering the subject market position, the marketing time pertaining to the market value conclusion(s) herein is estimated to be approximately 12 months.

Exposure Time: Exposure time is the length of time a property would have been offered on the market prior to consummation of sale at the estimate of market value on the effective date of the appraisal. Exposure time is a retrospective estimate based on the analysis of past events and market conditions. Locally, market conditions were weak from 2008 through mid-to-late 2010. Investors had been conservative due to 1) uncertainty and weakness in local market conditions, 2) uncertainty and weakness in local and national economies, and (3) reluctance in the mortgage lending community. Since 2011-2012, market and lending conditions have perceptively improved. Commercial land prices have strengthened and distressed transactions are no longer prevalent. With these considerations, the exposure time pertaining to the market value conclusion(s) for the subject is estimated to be approximately 12 months as of the effective date(s) of the appraisal.

Valuation and Conclusions – Market Rent

Comparative Analysis

To estimate market rent for the subject site (as a ground lease) numerous ground lease comparables in the local market were analyzed. A rent per square foot unit of comparison was employed. As presented in the following table, the ground lease comparables indicate a wide range from $0.37 to $3.35, with an average of $1.52 per square foot. The upper-tier of the range represents small pad sites in superior retail locations with significantly higher per square foot land values. Conversely, the lower-tier of the range represents larger sites in inferior commercial locations with lower per square foot land values. The best comparables are Comparables 14, 15, and 16, which exhibit a tighter range from $0.58 to $0.83, with an average of $0.71 per square foot. They are the most similar to the subject for size, location, and land/site improvements value. With primary emphasis give to Comparables 14, 15, and 16, and considering the site improvements on the subject site, **market rent for the subject site is concluded to be $0.79 per square foot or $190,000 annually ($0.79/sf x 241,947 sf site, rounded).**

Ground Lease Comparables

Comp	Location	Land Size (SF)	Land Size (AC)	Lease or Renewal Start	Term	Renewal Options	Rent/yr	Rent/sf/yr	Escalations	Lease Type	Use
1	300 S. Broadway, Boise	40,293	0.93	2012	20 yrs	Unk	$135,000	$3.35	3%/yr	NNN	Chik Fil-A restaurant
2	1415 & 1423 W. State St., Boise	16,470	0.38	2015	20 yrs	2-5 yr	$42,000	$2.55	2%/yr	NNN	Dutch Bros Coffee kiosk
3	1181 N. Milwaukee St., Boise	23,610	0.54	2013	20 yrs	3-5 yr	$60,000	$2.54	10%/ 5 yrs	NNN	Dutch Bros Coffee kiosk
4	3270 N. Eagle Rd., Meridian	42,994	0.99	2009	20 yrs	4-5 yr	$95,000	$2.21	10%/ 5 yrs	NNN	Key Bank
5	16801 Marketplace Blvd., Nampa	41,244	0.95	2008	20 yrs	5-5 yr	$90,000	$2.18	12.5%/ 5 yrs	NNN	McDonald's
6	1830 Caldwell Blvd., Nampa	50,530	1.16	2012	15 yrs	3-5 yr	$95,000	$1.88	10%/ 5 yrs	NNN	Texas Roadhouse
7	733 S. Pioneer Street, Boise	91,772	2.11	2015	20 yrs	3-5 yr	$172,550	$1.88	10%/ 5 yrs	NNN	Payette Brewery
8	1533 S. Five Mile Rd., Boise	47,480	1.09	2015	15 yrs	Unk	$77,000	$1.62	Unk	NNN	Key Bank
9	3251 E. Ustick Rd., Meridian	48,300	1.11	2010	20 yrs	6-5 yr	$74,000	$1.53	10%/ 5 yrs	NNN	McDonald's
10	3144 E. State St., Eagle	48,438	1.11	2011	20 yrs	4-5 yr	$70,000	$1.45	10%/ 5 yrs	NNN	Key Bank
11	3550 W. State Street, Boise	43,411	1.00	2015	5 yrs	2-5 yr	$55,500	$1.28	Flat	NNN	Chase Bank
12	1072 Liberty St., Boise	27,414	0.63	2008	50 yrs	1-50 yr	$32,897	$1.20	2.5%/yr	NNN	Medical Office
13	305 W. Overland Rd., Meridian	565,191	12.98	2008	20 yrs	Yes	$479,000	$0.85	Flat until options	NNN	Lowe's
14	10200-10548 W. Fairview Ave., Boise	144,619	3.32	1979/2007	50 yrs/10yrs	1-50 yr/1-10 yr	$120,492	$0.83	2%-5%/yr	NNN	Shopping Center (2 ground leases)
15	Aspen Creek Dev., Nampa	139,063	3.19	2011	10 yrs	1-5 yr	$83,258	$0.60	Flat	NNN	Office parking
16	7201 W. Fairview Ave., Boise	155,214	3.56	1981	36 yrs	7- 5 yr	$90,000	$0.58	Flat	NNN	Albertson's
17	5752 S. Federal Way, Boise	269,288	6.18	2010	8 yrs	3-5 yr	$132,000	$0.49	+2%/yr	NNN	Modular home manufacturing & models
18	1607-1611 Caldwell Blvd., Nampa	174,240	4.00	2013	20 yrs	6- 5 yr	$65,000	$0.37	Set Bumps	NNN	Big Lots, Dollar Tree
							Average	**$1.52**			
							Minimum	**$0.37**			
							Maximum	**$3.35**			

Rent as a Percentage of Value Crosscheck:

Rental rates for ground leases in the local market are typically predicated on an 8% to 10% return on fee simple land value and site improvement costs. At $190,000, our conclusion of market rent is 9.1% of our fee simple value conclusion of $2,090,000, lending further support to our conclusion of market rent for the subject. The analysis is summarized in the following table.

Ground Rent Cross Check

Market Value	Rate of Return	Implied Annual Rent	Rent/SF/YR
$2,090,000	8.0%	$167,200	$0.69
	9.1%	$190,000	$0.79
Effective Land Size	10.0%	$209,000	$0.86
241,947			

Market Lease Terms:

Market lease terms associated with our conclusion of market rent include:

Lease Type: Absolute Net – Tenant pays or reimburses all operating expenses including property taxes, insurance, common maintenance/repairs/replacement, and management. Expenses are typically based on the subject's prorated share of the larger parcel.
Lease Term: 20 year initial lease term with 4- 5 year options to extend.
Escalations: Base rent escalations of 10% every 6th year or 2% annually.

General Assumptions & Limiting Conditions

This appraisal is subject to the following limiting conditions:

1. The legal description – if furnished to us – is assumed to be correct.

2. No responsibility is assumed for legal matters, questions of survey or title, soil or subsoil conditions, engineering, availability or capacity of utilities, or other similar technical matters. The appraisal does not constitute a survey of the property appraised. All existing liens and encumbrances have been disregarded and the property is appraised as though free and clear, under responsible ownership and competent management unless otherwise noted.

3. Unless otherwise noted, the appraisal will value the property as though free of contamination. Valbridge Property Advisors | Mountain States Appraisal & Consulting, Inc. will conduct no hazardous materials or contamination inspection of any kind. It is recommended that the client hire an expert if the presence of hazardous materials or contamination poses any concern.

4. The stamps and/or consideration placed on deeds used to indicate sales are in correct relationship to the actual dollar amount of the transaction.

5. Unless otherwise noted, it is assumed there are no encroachments, zoning violations or restrictions existing in the subject property.

6. The appraiser is not required to give testimony or attendance in court by reason of this appraisal, unless previous arrangements have been made.

7. Unless expressly specified in the engagement letter, the fee for this appraisal does not include the attendance or giving of testimony by Appraiser at any court, regulatory, or other proceedings, or any conferences or other work in preparation for such proceeding. If any partner or employee of Valbridge Property Advisors | Mountain States Appraisal & Consulting, Inc. is asked or required to appear and/or testify at any deposition, trial, or other proceeding about the preparation, conclusions or any other aspect of this assignment, client shall compensate Appraiser for the time spent by the partner or employee in appearing and/or testifying and in preparing to testify according to the Appraiser's then current hourly rate plus reimbursement of expenses.

8. The values for land and/or improvements, as contained in this report, are constituent parts of the total value reported and neither is (or are) to be used in making a summation appraisal of a combination of values created by another appraiser. Either is invalidated if so used.

9. The dates of value to which the opinions expressed in this report apply are set forth in this report. We assume no responsibility for economic or physical factors occurring at some point at a later date, which may affect the opinions stated herein. The forecasts, projections, or operating estimates contained herein are based on current market conditions and anticipated short-term supply and demand factors and are subject to change with future conditions.

10. The sketches, maps, plats and exhibits in this report are included to assist the reader in visualizing the property. The appraiser has made no survey of the property and assumed no responsibility in connection with such matters.

11. The information, estimates and opinions, which were obtained from sources outside of this office, are considered reliable. However, no liability for them can be assumed by the appraiser.

12. Possession of this report, or a copy thereof, does not carry with it the right of publication. Neither all, nor any part of the content of the report, or copy thereof (including conclusions as to property value, the identity of the appraisers, professional designations, reference to any professional appraisal organization or the firm with which the appraisers are connected), shall be disseminated to the public through advertising, public relations, news, sales, or other media without prior written consent and approval.

13. No claim is intended to be expressed for matters of expertise that would require specialized investigation or knowledge beyond that ordinarily employed by real estate appraisers. We claim no expertise in areas such as, but not limited to, legal, survey, structural, environmental, pest control, mechanical, etc.

14. This appraisal was prepared for the sole and exclusive use of the client for the function outlined herein. Any party who is not the client or intended user identified in the appraisal or engagement letter is not entitled to rely upon the contents of the appraisal without express written consent of Valbridge Property Advisors | Mountain States Appraisal & Consulting, Inc. and Client. The Client shall not include partners, affiliates, or relatives of the party addressed herein. The appraiser assumes no obligation, liability or accountability to any third party.

15. Distribution of this report is at the sole discretion of the client, but no third-parties not listed as an intended user on the face of the appraisal or the engagement letter may rely upon the contents of the appraisal. In no event shall client give a third-party a partial copy of the appraisal report. We will make no distribution of the report without the specific direction of the client.

16. This appraisal shall be used only for the function outlined herein, unless expressly authorized by Valbridge Property Advisors | Mountain States Appraisal & Consulting, Inc.

17. This appraisal shall be considered in its entirety. No part thereof shall be used separately or out of context.

18. Unless otherwise noted in the body of this report, this appraisal assumes that the subject property does not fall within the areas where mandatory flood insurance is effective. Unless otherwise noted, we have not completed nor have we contracted to have completed an investigation to identify and/or quantify the presence of non-tidal wetland conditions on the subject property. Because the appraiser is not a surveyor, he or she makes no guarantees, express or implied, regarding this determination.

19. If the appraisal is for mortgage loan purposes 1) we assume satisfactory completion of improvements if construction is not complete, 2) no consideration has been given for rent loss during rent-up unless noted in the body of this report, and 3) occupancy at levels consistent with our "Income & Expense Projection" are anticipated.

20. It is assumed that there are no hidden or unapparent conditions of the property, subsoil, or structures which would render it more or less valuable. No responsibility is assumed for such conditions or for engineering which may be required to discover them.

21. Our inspection included an observation of the land and improvements thereon only. It was not possible to observe conditions beneath the soil or hidden structural components within the improvements. We inspected the buildings involved, and reported damage (if any) by termites, dry rot, wet rot, or other infestations as a matter of information, and no guarantee of the amount or degree of damage (if any) is implied. Condition of heating, cooling, ventilation, electrical and plumbing equipment is considered to be commensurate with the condition of the balance of the improvements unless otherwise stated.

22. This appraisal does not guarantee compliance with building code and life safety code requirements of the local jurisdiction. It is assumed that all required licenses, consents, certificates of occupancy or other legislative or administrative authority from any local, state or national governmental or private entity or organization have been or can be obtained or renewed for any use on which the value conclusion contained in this report is based unless specifically stated to the contrary.

23. When possible, we have relied upon building measurements provided by the client, owner, or associated agents of these parties. In the absence of a detailed rent roll, reliable public records, or "as-built" plans provided to us, we have relied upon our own measurements of the subject improvements. We follow typical appraisal industry methods; however, we recognize that some factors may limit our ability to obtain accurate measurements including, but not limited to, property access on the day of inspection, basements, fenced/gated areas, grade elevations, greenery/shrubbery, uneven surfaces, multiple story structures, obtuse or acute wall angles, immobile obstructions, etc. Professional building area measurements of the quality, level of detail, or accuracy of professional measurement services are beyond the scope of this appraisal assignment.

24. We have attempted to reconcile sources of data discovered or provided during the appraisal process, including assessment department data. Ultimately, the measurements that are deemed by us to be the most accurate and/or reliable are used within this report. While the measurements and any accompanying sketches are considered to be reasonably accurate and reliable, we cannot guarantee their accuracy. Should the client desire a greater level of measuring detail, they are urged to retain the measurement services of a qualified professional (space planner, architect or building engineer). We reserve the right to use an alternative source of building size and amend the analysis, narrative and concluded values (at additional cost) should this alternative measurement source reflect or reveal substantial differences with the measurements used within the report.

25. In the absence of being provided with a detailed land survey, we have used assessment department data to ascertain the physical dimensions and acreage of the property. Should a survey prove this information to be inaccurate, we reserve the right to amend this appraisal (at additional cost) if substantial differences are discovered.

26. If only preliminary plans and specifications were available for use in the preparation of this appraisal, then this appraisal is subject to a review of the final plans and specifications when available (at additional cost) and we reserve the right to amend this appraisal if substantial differences are discovered.

27. Unless otherwise stated in this report, the value conclusion is predicated on the assumption that the property is free of contamination, environmental impairment or hazardous materials. Unless otherwise stated, the existence of hazardous material was not observed by the appraiser and the appraiser has no knowledge of the existence of such materials on or in the property. The appraiser, however, is not qualified to detect such substances. The presence of substances such as asbestos, urea-formaldehyde foam insulation, or other potentially hazardous materials may affect the value of the property. No responsibility is assumed for any such conditions, or for any expertise or engineering knowledge required for discovery. The client is urged to retain an expert in this field, if desired.

28. The Americans with Disabilities Act ("ADA") became effective January 26, 1992. We have not made a specific compliance survey of the property to determine if it is in conformity with the various requirements of the ADA. It is possible that a compliance survey of the property, together with an analysis of the requirements of the ADA, could reveal that the property is not in compliance with one or more of the requirements of the Act. If so, this could have a negative effect on the value of the property. Since we have no direct evidence relating to this issue, we did not consider possible noncompliance with the requirements of ADA in developing an opinion of value.

29. This appraisal applies to the land and building improvements only. The value of trade fixtures, furnishings, and other equipment, or subsurface rights (minerals, gas, and oil) were not considered in this appraisal unless specifically stated to the contrary.

30. No changes in any federal, state or local laws, regulations or codes (including, without limitation, the Internal Revenue Code) are anticipated, unless specifically stated to the contrary.

31. Any income and expense estimates contained in the appraisal report are used only for the purpose of estimating value and do not constitute prediction of future operating results. Furthermore, it is inevitable that some assumptions will not materialize and that unanticipated events may occur that will likely affect actual performance.

32. Any estimate of insurable value, if included within the scope of work and presented herein, is based upon figures developed consistent with industry practices. However, actual local and regional construction costs may vary significantly from our estimate and individual insurance policies and underwriters have varied specifications, exclusions, and non-insurable items. As such, we strongly recommend that the Client obtain estimates from professionals experienced in establishing insurance coverage. This analysis should not be relied upon to determine insurance coverage and we make no warranties regarding the accuracy of this estimate.

33. The data gathered in the course of this assignment (except data furnished by the Client) shall remain the property of the Appraiser. The appraiser will not violate the confidential nature of the appraiser-client relationship by improperly disclosing any confidential information furnished to the appraiser. Notwithstanding the foregoing, the Appraiser is authorized by the client to disclose all or any portion of the appraisal and related appraisal data to appropriate representatives of the Appraisal Institute if such disclosure is required to enable the appraiser to comply with the Bylaws and Regulations of such Institute now or hereafter in effect.

34. You and Valbridge Property Advisors | Mountain States Appraisal & Consulting, Inc. both agree that any dispute over matters in excess of $5,000 will be submitted for resolution by arbitration. This includes fee disputes and any claim of malpractice. The arbitrator shall be mutually selected. If Valbridge Property Advisors | Mountain States Appraisal & Consulting, Inc. and the client cannot agree on the arbitrator, the presiding head of the Local County Mediation & Arbitration panel shall select the arbitrator. Such arbitration shall be binding and final. In agreeing to arbitration, we both acknowledge that, by agreeing to binding arbitration, each of us is giving up the right to have the dispute decided in a court of law before a judge or jury. In the event that the client, or any other party, makes a claim against Mountain States Appraisal & Consulting, Inc. or any of its employees in connections with or in any way relating to this assignment, the maximum damages recoverable by Valbridge Property Ad

35. visors | Mountain States Appraisal & Consulting, Inc. for this assignment, and under no circumstances shall any claim for consequential damages be made.

36. Valbridge Property Advisors | Mountain States Appraisal & Consulting, Inc. shall have no obligation, liability, or accountability to any third party. Any party who is not the "client" or intended user identified on the face of the appraisal or in the engagement letter is not entitled to rely upon the contents of the appraisal without the express written consent of Valbridge Property Advisors | Mountain States Appraisal & Consulting, Inc. "Client" shall not include partners, affiliates, or relatives of the party named in the engagement letter. Client shall hold Valbridge Property Advisors | Mountain States Appraisal & Consulting, Inc. and its employees harmless in the event of any lawsuit brought by any third party, lender, partner, or part-owner in any form of ownership or any other party as a result of this assignment. The client also agrees that in case of lawsuit arising from or in any way involving these appraisal services, client will hold Valbridge Property Advisors | Mountain States Appraisal & Consulting, Inc. harmless from and against any liability, loss, cost, or expense incurred or suffered by Valbridge Property Advisors | Mountain States Appraisal & Consulting, Inc. in such action, regardless of its outcome.

37. The value opinion(s) provided herein is subject to any and all predications set forth in this report.

38. The Valbridge Property Advisors office responsible for the preparation of this report is independently owned and operated by Mountain States Appraisal & Consulting, Inc. Neither Valbridge Property Advisors, Inc., nor any of its affiliates has been engaged to provide this report. Valbridge Property Advisors, Inc. does not provide valuation services, and has taken no part in the preparation of this report.

39. If any claim is filed against any of Valbridge Property Advisors, Inc., a Florida Corporation, its affiliates, officers or employees, or the firm providing this report, in connection with, or in any way arising out of, or relating to, this report, or the engagement of the firm providing this report, then (1) under no circumstances shall such claimant be entitled to consequential, special or other damages, except only for direct compensatory damages, and (2) the maximum amount of such compensatory damages recoverable by such claimant shall be the amount actually received by the firm engaged to provide this report.

40. This report and any associated work files may be subject to evaluation by Valbridge Property Advisors, Inc., or its affiliates, for quality control purposes.

41. Acceptance and/or use of this appraisal report constitutes acceptance of the foregoing general assumptions and limiting conditions.

Certification

I, Jeff Vance, MAI, certify that, to the best of my knowledge and belief:

- The statements of fact contained in this report are true and correct.
- The reported analyses, opinions, and conclusions are limited only by the reported assumptions and limiting conditions and are my personal, impartial, and unbiased professional analyses, opinions, and conclusions.
- I have no present or prospective interest in the property that is the subject of this report and no personal interest with respect to the parties involved.
- I have no bias with respect to the property that is the subject of this report or to the parties involved with this assignment.
- I have performed no services as an appraiser or in any other capacity regarding the property that is the subject of this report within the three-year period immediately preceding acceptance of this assignment.
- My engagement in this assignment was not contingent upon developing or reporting predetermined results.
- My compensation for completing this assignment is not contingent upon the development or reporting of a predetermined value or direction in value that favors the a cause of the client, the amount of the value opinion, the attainment of a stipulated result, or the occurrence of a subsequent event directly related to the intended use of this appraisal.
- My analyses, opinions, and conclusions were developed, and this report has been prepared, in conformity with the *Uniform Standards of Professional Appraisal Practice*.
- The reported analyses, opinions, and conclusions were developed, and this report has been prepared, in conformity with the requirements of the Code of Professional Ethics & Standards of Professional Appraisal Practice of the Appraisal Institute.
- The use of this report is subject to the requirements of the Appraisal Institute relating to review by its duly authorized representatives.
- I have made a current personal inspection of the property that is the subject of this report.
- The appraisal assignment was not based on a requested minimum valuation, a specific valuation, or the approval of a loan, and the appraiser's state registration/certification has not been revoked, suspended, cancelled, or restricted.
- This is to acknowledge the assistance of Joe Corlett, MAI, SRA, in preparation of this appraisal.
- As of the date of this report, I, Jeff Vance, MAI, have completed the continuing education program for Designated Members of the Appraisal Institute.
- Effective July 1, 1992, the State of Idaho implemented a mandatory program of licensing/certification of real estate appraisers. I have met the qualifications to appraise all types of real estate and am currently certified. My certification number is CGA-2828.

Jeff R. Vance

Jeff Vance, MAI
Senior Appraiser
State of Idaho Certification No. CGA-2828

Certification

I, Joe Corlett, MAI, SRA, certify that, to the best of my knowledge and belief:

- The statements of fact contained in this report are true and correct.
- The reported analyses, opinions, and conclusions are limited only by the reported assumptions and limiting conditions and are my personal, impartial, and unbiased professional analyses, opinions, and conclusions.
- I have no present or prospective interest in the property that is the subject of this report and no personal interest with respect to the parties involved.
- I have no bias with respect to the property that is the subject of this report or to the parties involved with this assignment.
- I have performed no services as an appraiser or in any other capacity regarding the property that is the subject of this report within the three-year period immediately preceding acceptance of this assignment.
- My engagement in this assignment was not contingent upon developing or reporting predetermined results.
- My compensation for completing this assignment is not contingent upon the development or reporting of a predetermined value or direction in value that favors the a cause of the client, the amount of the value opinion, the attainment of a stipulated result, or the occurrence of a subsequent event directly related to the intended use of this appraisal.
- My analyses, opinions, and conclusions were developed, and this report has been prepared, in conformity with the *Uniform Standards of Professional Appraisal Practice*.
- The reported analyses, opinions, and conclusions were developed, and this report has been prepared, in conformity with the requirements of the Code of Professional Ethics & Standards of Professional Appraisal Practice of the Appraisal Institute.
- The use of this report is subject to the requirements of the Appraisal Institute relating to review by its duly authorized representatives.
- I have made a current personal inspection of the property that is the subject of this report.
- The appraisal assignment was not based on a requested minimum valuation, a specific valuation, or the approval of a loan, and the appraiser's state registration/certification has not been revoked, suspended, cancelled, or restricted.
- This is to acknowledge the assistance of Jeff Vance, MAI, in preparation of this appraisal.
- As of the date of this report, I, Joe Corlett, MAI, SRA have completed the continuing education program for Designated Members of the Appraisal Institute.
- Effective July 1, 1992, the State of Idaho implemented a mandatory program of licensing/certification of real estate appraisers. I have met the qualifications to appraise all types of real estate and am currently certified. My certification number is CGA-7.

Joe Corlett, MAI, SRA
Senior Managing Director
State of Idaho Certification No. CGA-7

QUALIFICATIONS OF JEFF VANCE, MAI

Education:

Bachelor of Science, Business-Marketing
University of Idaho, Moscow, Idaho; 1994

Appraisal Institute Courses:

USPAP- National Uniform Standards and Professional Appraisal Practice Course, 2006
Course I-110, Appraisal Principles, 2006
Course I-120, Appraisal Procedures, 2006
Real Estate Financing, Statistics, & Valuation Modeling, 2007
General Appraiser Income Approach Part 1, 2007
General Market Analysis and Highest and Best Use, 2008
General Sales Comparison Approach, 2008
General Site Valuation and Cost Approach, 2008
General Report Writing & Case Studies, 2009
General Appraiser Income Approach Part 2, 2009
Advanced Sales Comparison & Cost Approaches, 2009
USPAP Update, 2009, 2011, 2013, 2014
Business Practices and Ethics, 2009, 2014
Foreclosure, Short Sale, Auction Price Seminar, 2010
Subdivision Valuation, 2010
Advanced Concepts and Case Studies, 2011
Advanced Income Capitalization, 2012
General Demonstration Report-Capstone Program, 2013
Uniform Appraisal Standards for Federal Land Acquisitions, 2016

Accreditation:

Effective July 1, 1991, the State of Idaho implemented a mandatory program of licensing/certification of real estate appraisers; the program became mandatory July 1, 1992. I am currently qualified as a Certified General Appraiser. My CGA number is 2828.

Memberships/Affiliations:

MAI – Member, Appraisal Institute
Member, Southern Idaho Chapter, Appraisal Institute

Experience:

MAI, Senior Appraiser, Mountain States Appraisal and Consulting, Inc.;
Boise, Idaho; August 2013 to present
Certified General Appraiser, Mountain States Appraisal and Consulting, Inc.;
Boise, Idaho; January 2010 to August 2013
Registered Trainee, Haxton & Company; January 2008 to January 2010
Registered Trainee, Mountain States Appraisal and Consulting, Inc.,
Boise, Idaho; May 2007 to December 2007
Process Supervisor, Product Engineering Failure Analysis Laboratory
Micron Technology, Boise, Idaho; 1994 to 2006

Scope of Appraisal Experience:

Apartment, industrial, office, medical office, retail, service commercial, mixed-use commercial, shopping center, commercial subdivision, residential subdivision, residential to office conversion, mini-storage, mobile home park, church, ground leases, and vacant land.

QUALIFICATIONS OF JEFF VANCE, MAI (Cont'd.)

Major Clients Served:

Wells Fargo Bank, US Bank, Zions First National Bank, Home Federal Bank, D.L. Evans Bank, Bank of the Cascades, Mountain West Bank, Bank of the West, Northwest Bank, Banner Bank, Idaho Independent Bank, Washington Trust Bank, Public Employees Retirement System of Idaho, Harty Mortgage Advisors, and Capital City Development Corporation

Bureau of Occupational Licenses
Department of Self Governing Agencies
person named has met the requirements for licensure and is entitled under the laws and rules of the State of Idaho to operate as a(n)

CERTIFIED GENERAL APPRAISER

JEFFREY ROBERT VANCE
1459 TYRELL LANE SUITE B
BOISE ID 83706

Tana Cory

Tana Cory	CGA-2828	04/18/2017
Chief, B.O.L.	Number	Expires

QUALIFICATIONS OF G. JOSEPH CORLETT, MAI, SRA

Biographic Data

Born in Nampa, Idaho; raised in Boise, Idaho. Summer employment as farm laborer, data processing assistant, and supply clerk for Bank of Idaho. After graduation from University of Idaho, full-time fee appraiser.

Education

Elementary School - Boise, Idaho
High School - San Rafael Military Academy, San Rafael, California
College - University of Idaho (Bachelor of Science Degree in Business, Major in Finance) - 1973
AIREA Appraisal Courses Passed (Since 1973) (Appraisal Institute):

I-A Basic Appraisal Principles, Methods & Techniques - 2 weeks
I-B Capitalization Theory & Techniques - 2 weeks
II Urban Properties - 2 weeks
VII Industrial Properties - 1 week
VIII Single-Family Residential Appraisal - 1 week
Cap. III Capitalization Theory & Techniques, Part 3 - 1 week - 1980
II-3 Standards of Prof. Practice - 1982, 1986, 1989, 1993 (#410/420), 1997, 2002 (#410), 1998, 2002 (#430), 2004 USPAP Update, 2005, 2007, 2009, 2011, 2013, 2014, 2015, 2016
VI Investment Analysis - 1984
X Market Analysis - 1987
301 Basic Capitalization - 1993
530 Advanced Sales Comparison and the Cost Approach – 1997
Valuation of Conservation Easements (33 hrs. classroom) – 2007
Appraisal Curriculum Overview (15 hrs.) - 2010

University Courses:
Principles of Real Estate
The Appraisal of Real Estate

Seminars:
Graduate Realtors Institute Course 100
Regulatory Compliance and Idaho Law (1998)
SREA Narrative Report Seminar on Income Producing Property Condominium Seminar
R-2 Examination and Math Stat Finance - SREA
AIREA Capitalization Workshop
AIREA Feasibility Seminar
SREA Instructor's Clinic, Course 101 - Purdue University
Leasehold Seminar
Hotel/Motel Seminar
Money Markets
Financial Institution Review Considerations (1998)
FHLBB R-41B/C Seminars - 1986, 1987
Real Estate and Taxation
Market Analysis Seminar - 1987
Professional Practice Seminar - 1986, 1991
SREA - Professional Practice - 1988
AIREA - Cash Equivalent Seminar - 1988
AIREA - Litigation Valuation - 1988
AIREA - Investment Analysis - 1989
AIREA - Applied Sales Comparison Approach - 1989
AIREA - Rates, Ratios and Reasonableness – 1989
PSI, Inc. - Asbestos and Other Environmental Concerns - 1990
Environmental Law Issues, 1991
Appraisal Institute - Appraising Contaminated Properties - 1992
Appraisal Institute - Appraisal Review Seminar – 1992

***QUALIFICATIONS OF G. JOSEPH CORLETT, MAI, SRA**, Cont'd.*

Education, Cont'd.

Appraisal Institute - ADA Seminar - 1993
Appraisal Institute - Report Writing Seminar - 1993
Appraisal Institute - DCF Analysis - 1993
Appraisal Institute - Understanding Limited Appraisals and Reporting Options - 1994
Appraisal Institute - Specialized Appraisal Issues - 1994
Appraisal Institute - Fair Lending and the Appraiser - 1996
The Signage Foundation for Communication Excellence, Inc. - Retail and Commercial Valuation and Evaluation Research and Techniques - 1996
Lincoln Institute - Valuing Land Affected by Conservation Easements - 1998
Appraisal Institute - Appraisal of Local Retail Properties - 1999
Appraisal Institute - The Electronic Appraisal Office - 1999
Appraisal Institute - Special Purpose Properties - 1999
Appraisal Institute - Appraisal Mapping Business Valuation - 2000
Appraisal Institute - Federal Land Exchanges and Acquisitions - 2000
Appraisal Institute - Attacking and Defending the Appraisal in Litigation - 2000
Appraisal Institute - Appraisals in Eminent Domain – 2001
Appraisal Institute - Appraisal of Non-conforming Properties – 2001
Appraisal Institute - Real Estate Fraud Seminar - 2001
Appraisal Institute - Privacy Seminar – 2001
NBI- Real Estate Exchanges- 2001
American Arbitration Association- Commercial Arbitrator II- 2002
The Still Group – The Investment Real Estate Workshop – 2003, 2006
Academy for Real Estate Careers – Core Continuing Education – 2003
University of Idaho- Proximity Damages - 2003
McKissock- Fair Housing – 2004
Appraisal Institute- Distressed Properties – 2004, 2010, 2012
NAR- Realtor Ethics – 2004
Pioneer Real Estate School- Real Estate Law – 2004
Pioneer Real Estate School- Brokerage Management – 2004
IREC Core Commission Requirement – 2006
Appraisal Institute UASFLA (Yellow Book) Seminar – 2007
Evaluating Commercial Construction – 2007
Business Practices and Ethics - 2008
Appraisal Challenges: Declining Markets and Sales Concessions – 2009
Wind Powered Electrical Generators – 2010
Understanding Conservation Easements – 2010
Loss Prevention for Real Estate Appraisers – 2011
Valuing Commercial Green Buildings – 2012
Appraisal Institute #833 – Fundamentals of Separating Real Property, Personal Property, and Intangible Business Assets – 2012
McKissock – Dirty Dozen, Development & Reporting – 2014
Appraisal Institute – Business Practices & Ethics – 2014
Prior Adjunct Appraisal Instructor – Boise State University
Appraisal Institute – Advanced Computer Applications for Appraisers and Fractional Interest Valuation – 2014
Appraisal Institute – The Discounted Cash Flow Model: Concepts, Issues and Apps. – 2015
McKissock – Expert Witness for Commercial Appraisers – 2015
Idaho Coalition of Land Trusts – Conservation Easements – 2015
Appraisal Institute – Fundamentals of Tax Appeals – 2015
Appraisal Institute – Data Verification Methods & Techniques - 2016

QUALIFICATIONS OF G. JOSEPH CORLETT, MAI, SRA, *Cont'd.*

Business Activities and Positions

Fee appraiser and an owner of Valbridge Property Advisors | Mountain States Appraisal and Consulting, Inc., March 1976 to date.* Narrative report experience consists of appraising numerous commercial, industrial, and special-purpose properties. Currently appraising commercial, industrial, special use, subdivision properties, and income properties. Qualified expert witness in district and federal courts. Past Senior instructor for SREA Course 101.

Affiliations and Memberships

Appraisal Institute - Professional Designations, MAI, SRA
Appraisal Institute, Southern Idaho Chapter - Vice President (1998) - President (1999)
AIREA Chapter No. 55 President (1986); various local, regional, and national committees (1976-1991)
Society of Real Estate Appraisers Chapter No. 157 Vice President (1976-1977 and 1978-1979);
1st Vice President (1980-1981); President (1981-1982)
National Association of Realtors©
Licensed Real Estate Broker - State of Idaho (DB-1660)
Society of Real Estate Appraisers - National Young Advisory Council (1977 and 1979)
Certified Appraiser - State of Oregon #C-000294
Appraisal Institute Director (1994-96)
Appraisal Institute National Government Relations Committee (1998-2001)
Commercial Pilot Multi & Single Engine/ Land- Instruments
Director - Emeritus Idaho Aviation Association-Treasure Valley Chapter
President - Idaho Aviation Hall of Fame (2016)
Building Contractor's Association of Southwestern Idaho - Associate Council Chairman (1978)
Vice President – Communications – Idaho Aviation Association
Director - Idaho Aviation Foundation

Accreditation

As of the date of this report, I have completed the requirements of the continuing education program of the Appraisal Institute.

Effective July 1, 1991, the State of Idaho implemented a mandatory program of licensing/certification of real estate appraisers. I have met the qualifications to appraise all types of real estate. My certification number is CGA-7.

*Corlett Associates - May 1, 1974 to March, 1976.

Major Clients Served

U.S. Forest Service
Wells Fargo Bank
US Bank
Key Bank of Idaho
Home Federal Bank
Washington Federal Savings and Loan
D.L. Evans Bank
Bank of the Cascades
Meridian Gold
PERSI
Numerous private clients and corporations
Federal Aviation Administration
Mountain West Bank
Seafirst Bank
The Conservation Fund
Bank of America
Western Union
State of Idaho
Federal National Mortgage Association
City of Boise
Ada County
Textron Financial
The Nature Conservancy
Comerica Bank
Cal National Bank
Bank of the West

Appraisal Emphasis

Income-producing properties, including commercial, industrial, offices, shopping centers, and shop buildings; special-use properties, including subdivisions, factories, golf courses, wilderness ranches, and processing plants.

Areas of Previous Experience

Idaho - majority of counties
Oregon - Eastern and Central counties
Washington - Eastern Washington
Nevada - Northern Nevada and Reno areas
California - Los Altos area
Colorado - Grand Junction area
Montana - Great Falls area
Wyoming - Jackson area

Areas of Current Practice

Idaho
Oregon

Bureau of Occupational Licenses
Department of Self Governing Agencies
The person named has met the requirements for licensure and is entitled under the laws and rules of the State of Idaho to operate as a(n)

CERTIFIED GENERAL APPRAISER

G JOSEPH CORLETT
1459 TYRELL LN STE B
BOISE ID 83706

Tana Cory

Tana Cory	CGA-7	03/11/2017
Chief, B.O.L.	Number	Expires

Valbridge
PROPERTY ADVISORS
Mountain States Appraisal & Consulting, Inc.

March 14, 2016

Dr. Bessie Katsilometes, AVP, ISU-Meridian
Via: Email

RE: Proposal & Engagement
122,000+/- S.F of Land,
Meridian Campus, Meridian, Idaho, 83646

Dear Dr. Katsilometes:

Pursuant to our phone conversation with Mr. Ray Kaufman, I submit our fee estimate for an appraisal of the above captioned property for the purpose of estimating its as is market value, as well as a fair market rental estimate. We have performed no services, as an appraiser or in any other capacity, regarding the subject property within the three-year period immediately preceding the date of this letter.

The appraisal I propose will be a narrative report with summary support for its value conclusions. Also, we will detail typical land rental terms and amounts. It will be made in conformity with, and is subject to the requirements of the Code of Professional Ethics and Standards of Professional Conduct of the Appraisal Institute and the Uniform Standards of Professional Appraisal Practice.

The fee to complete this assignment is $3,500 and is due in full at the time of delivery. Unless otherwise instructed, we will furnish you 3 copies of the report in addition to an electronic copy. The estimated completion date is 30 days from our receipt of your authorization to proceed and receipt of the requested information. In order to complete the appraisal we ask that you provide us relevant information needed for its preparation listed on the attached page.

The client of this appraisal shall be Idaho State University-Meridian and is for its sole and exclusive use. We request that you seek our written authorization before releasing the report to any other party.

Valbridge
PROPERTY ADVISORS
Mountain States Appraisal & Consulting, Inc.

The appraisal will not take into consideration the possibility that the property may be contaminated with PCB's, or any other hazardous, or radioactive substances. The value reported will be exclusive of the costs to discover, remove, or render harmless such environmental impairments. If you have any concern such substances may exist in the property, you should hire a qualified independent engineer or contractor to investigate. We cannot assume any responsibility for the discovery, analysis, or treatment of such substances on the subject or its surroundings.

I trust the above is satisfactory to your needs. Attached to and incorporated in this engagement letter are Valbridge Property Advisors | Mountain States Appraisal and Consulting Terms and Conditions of Agreement. These Terms and Conditions are a substantive part of our engagement and govern the work to be performed for you. The appraisal will be completed in a timely fashion.

Respectfully submitted,
Valbridge Property Advisors |
Mountain States Appraisal and Consulting

Joe Corlett

Digitally signed by Joe Corlett
DN: cn=Joe Corlett, o=Mountain States Appraisal & Consulting, Inc., ou=Corporation, email=jcorlett@appraiseidaho.com, c=US
Date: 2016.03.17 16:06:32 -06'00'

Joe Corlett, MAI, SRA
Senior Managing Director
Valbridge Property Advisors|Mountain States Appraisal & Consulting, Inc.
jcorlett@valbridge.com
208 336-1097

AGREED AND ACCEPTED

Arthur Vailas
Name (type or print)

Arthur Vailas

3/17/16
Date

Valbridge
PROPERTY ADVISORS
Mountain States Appraisal & Consulting, Inc.

MATERIALS & INFORMATION REQUESTED FOR APPRAISAL ASSIGNMENT (IF AVAILABLE)

RE: **122,000 +/- S.F. of Land**
ISU-Meridian Campus
Meridian, ID

1. Latest Real Estate Tax Bill
2. Latest Real Estate Assessment Notice
3. Site Plans
4. Descriptive Information
5. Disclosure of hazardous/potentially hazardous materials or underground storage tanks
6. Contract of Sale/Recent Purchase Information - listing of all sales and prices
7. Legal Description
8. Name and telephone number of contact person
9. Prior appraisal reports, market studies or descriptive information
10. Property Condition or Engineering reports, if available
11. Environmental reports, if available
12. Any other information you deem pertinent

Valbridge
PROPERTY ADVISORS
Mountain States Appraisal & Consulting, Inc.

TERMS AND CONDITIONS OF AGREEMENT
APPRAISAL

1. These Terms and Conditions, when attached to any agreement for appraisal services between Client and Appraiser ("Agreement"), shall be deemed a part of such Agreement as though set forth in full therein.

2. Appraiser shall exercise independent judgment and complete the appraisal assignment called for by the Agreement ("Assignment") in accordance with sound appraisal practice and the Code of Professional Ethics and Standards of Professional Conduct of the Appraisal Institute.

3. All statements of fact in the appraisal report which are used as the basis of Appraiser's analyses, opinions, and conclusions will be true and correct to the best of Appraiser's knowledge and belief. Appraiser may rely upon the accuracy of information and material furnished to Appraiser by Client.

4. Appraiser shall have no responsibility for legal matters, questions of survey or title, soil or subsoil conditions, engineering, or other similar technical matters. The appraisal report will not constitute a survey of the property appraised.

5. Any party who is not the client or intended user identified in the appraisal or engagement letter is not entitled to rely upon the contents of the appraisal without express written consent of Connie Smith and Client. Distribution of the report is at the sole discretion of the client. We assume no responsibility for unauthorized use of the appraisal by a third-party.

6. Client shall, in a timely manner, provide Appraiser with such materials with respect to the Assignment as are requested by Appraiser and in the possession or under the control of Client. Client shall provide Appraiser with sufficient access to the real property to be appraised, and hereby grants permission for entry, at reasonable times during business hours. A delay in receipt of information may delay completion of the assignment.

7. To the extent allowed by law, each of the parties will indemnify and hold the other party harmless from and against any liability, cost or expense (including attorney fees) arising out of any claim or legal proceedings brought by a third party where such claim or legal proceedings is based on the negligent act or omission, or misconduct of the party against whom indemnification is sought.

8. Unless expressly specified in the Agreement, the fee quoted does not include the attendance or giving of testimony by Appraiser at any court, regulatory, or other proceedings, or any conferences or other work in preparation for such proceeding. If any partner or employee of Valbridge Property Advisors or Mountain States Appraisal & Consulting Inc. is asked or required to appear and/or testify at any deposition, trial, or other proceeding about the preparation, conclusions or any other aspect of this assignment, Client shall compensate Appraiser for the time spent by the partner or employee in appearing and/or testifying and in preparing to testify according to the Appraiser's then current hourly rate plus reimbursement of expenses.

Valbridge PROPERTY ADVISORS
Mountain States Appraisal & Consulting, Inc.

9. In the event Client requests additional consultation or work beyond the scope of this assignment or following completion of the initial assignment or in the event that the appraiser is deposed or called as a witness to testify at a trial or other proceeding, Client shall pay an additional charge for this work, at the Appraiser's standard hourly rate, whether or not the completed appraisal report has been delivered to Client at the time of the request. Often the Appraiser will be called upon as a witness to testify about the appraisal report or the Appraiser's conclusions or methodology. Any additional work for this purpose will be charged at Appraiser's standard hourly rate.

10. Client agrees that the appraisal report shall not be quoted or referred to in any financial statement of Client or in any documents filed with any governmental agency, if it is anticipated that such statement or documents will be relied upon by a member of the public in making an investment in property that is the subject of the appraisal, without the prior written consent of Appraiser. Neither all nor any part of the content of the appraisal report including, without limitation, the conclusions as to value, the identity of Appraiser, references to the Appraisal Institute or references to the MAI or SRA designations shall be disseminated to the public through advertising or other mass media without the prior written consent of Appraiser.

11. The data gathered in the course of the Assignment (except data furnished by Client) shall remain the property of the Appraiser. The appraisal report prepared pursuant to the Agreement shall remain the property of Client. With respect to data provided by Client, Appraiser shall not violate the confidential nature of the appraiser-client relationship by improperly disclosing any confidential information furnished to Appraiser. Notwithstanding the foregoing, Appraiser is authorized by Client to disclose all or any portion of the appraisal report and the related appraisal data to appropriate representatives of the Appraisal Institute if such disclosure is required to enable Appraiser to comply with the Bylaws and Regulations of such Institute as now or hereafter in effect.

12. The fee for this appraisal is not contingent upon the valuation of the property, the funding of any loan, or the outcome of litigation. Should the assignment be terminated prior to completion, Client agrees to pay for time and costs incurred prior to our receipt of written notice of cancellation.

13. In the event Client fails to make payment when due and payable, then from that date until payment in full is received, the amount due and payable shall bear interest at the rate of 18% per annum. If collection of any past due amounts are sent to a lawyer, regardless of whether a lawsuit is filed, the Client is responsible for all costs of collection, including attorneys' fees.

14. Valbridge Property Advisors | Mountain States Consulting & Appraisal Inc. reserves the right to approve or disapprove (the approval not to be unreasonably withheld), in writing and in advance of any filing with the SEC or other governmental agency, all uses of Valbridge Property Advisors and/or Mountain States Consulting & Appraisal Inc. name or references to the services provided hereunder by Valbridge Property Advisors and/or Mountain States Consulting & Appraisal Inc. provided however that such approval shall not be necessary in the event the appraisal report, the appraisers name, or the services provided hereunder are required to be disclosed as part of any SEC or other governmental filing.

Valbridge PROPERTY ADVISORS
Mountain States Appraisal & Consulting, Inc.

15. (Reserved)

16. The Valbridge Property Advisors office responsible for the preparation of this report is independently owned and operated by Mountain States Consulting & Appraisal Inc. Valbridge Property Advisors, Inc. has not been engaged to provide this report, does not provide valuation services, and has taken no part in the preparation of this report.

17. If any claim is filed against any of Valbridge Property Advisors, Inc. a Florida Corporation, its affiliates, officers or employees, or the firm providing this report, in connection with, or in any way arising out of, or relating to, this report, or the engagement of the firm providing this report, then (1) under no circumstances shall such claimant be entitled to consequential, special or other damages, except only for direct compensatory damages and (2) the maximum amount of such compensatory damages recoverable by such claimant shall be the amount actually received by the firm engaged to provide this report.

18. This report and any associated work files are subject to evaluation by Valbridge Property Advisors, Inc. for quality control purposes. If Client is unwilling to waive confidentiality for this purpose, client must inform Mountain States Consulting & Appraisal Inc. upon acceptance of this assignment.

19. All disputes shall be settled by binding arbitration in accordance with then then-existing commercial arbitration rules of the American Arbitration Association (the "AAA).

20. This document contains the entire agreement of the parties. No other agreement, statement or promise made on or before the effective date of this agreement will be binding on the parties. This agreement may only be modified by subsequent written agreement of the parties.

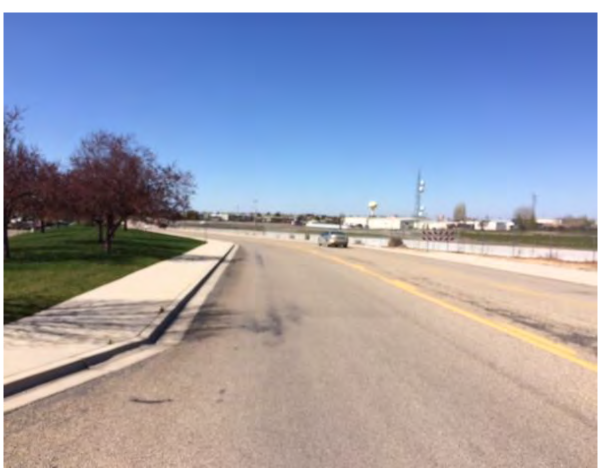
Subject Photographs (Taken 4/7/2016)

Subject viewing south

Viewing north

Viewing west

Adjacent Idaho State University –Meridian Building

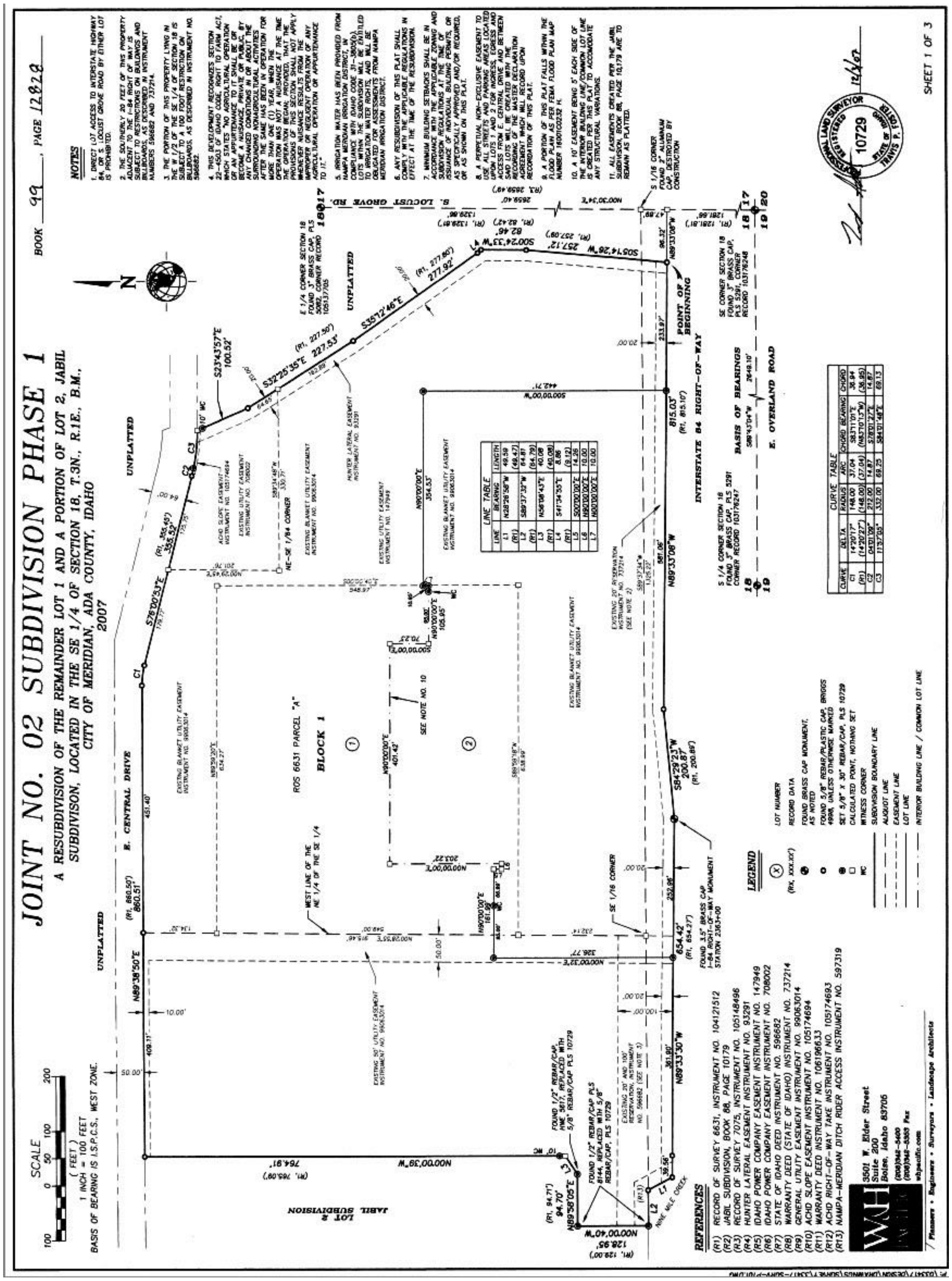


E. Central Dr., viewing west, subject on left

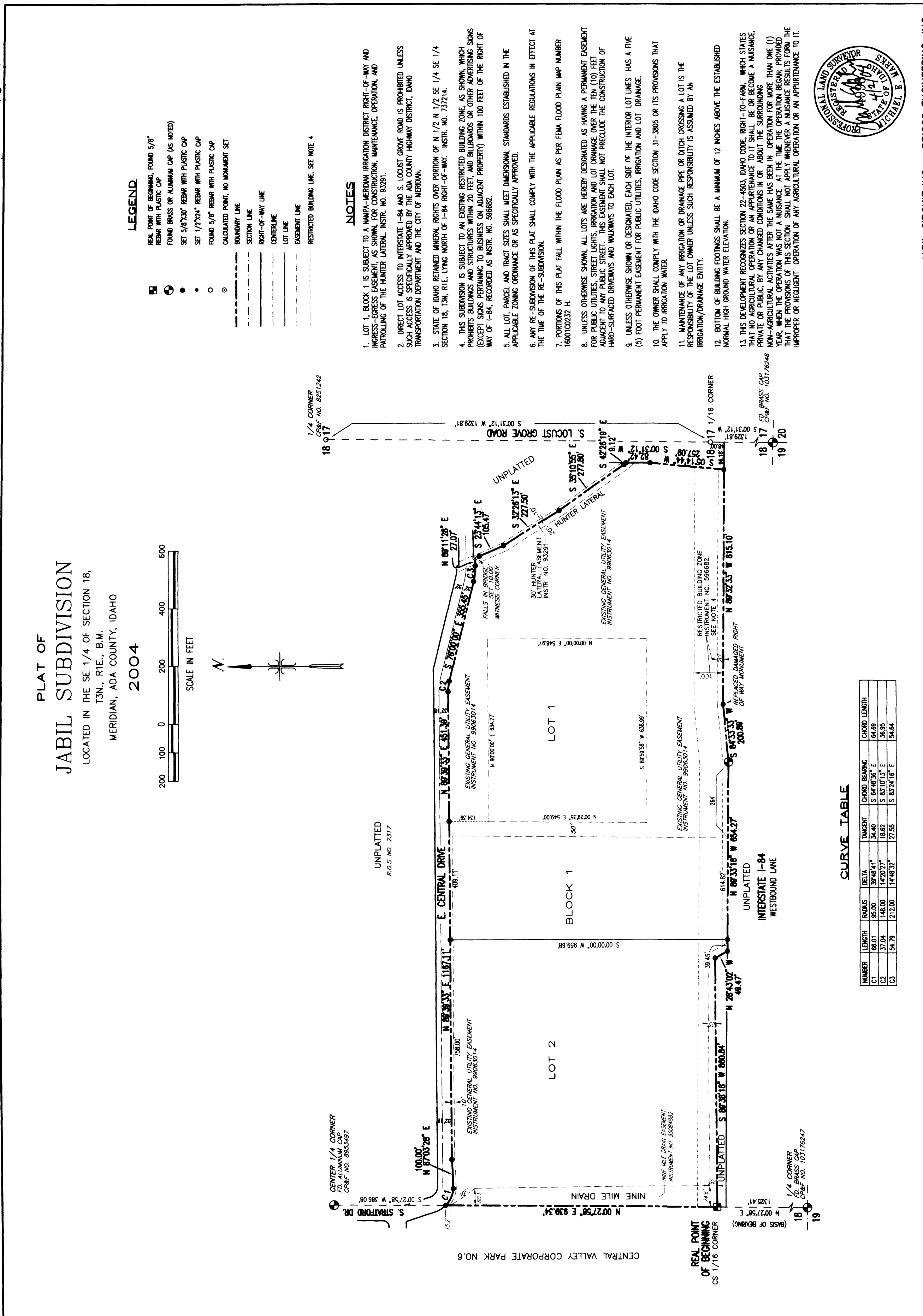
E. Central Dr., viewing east, subject on right

ATTACHMENT 3

1303 E. CENTRAL DRIVE, MERIDIAN
ADDENDA
ID02-16-0076-000



Bk 88 pg 10,179



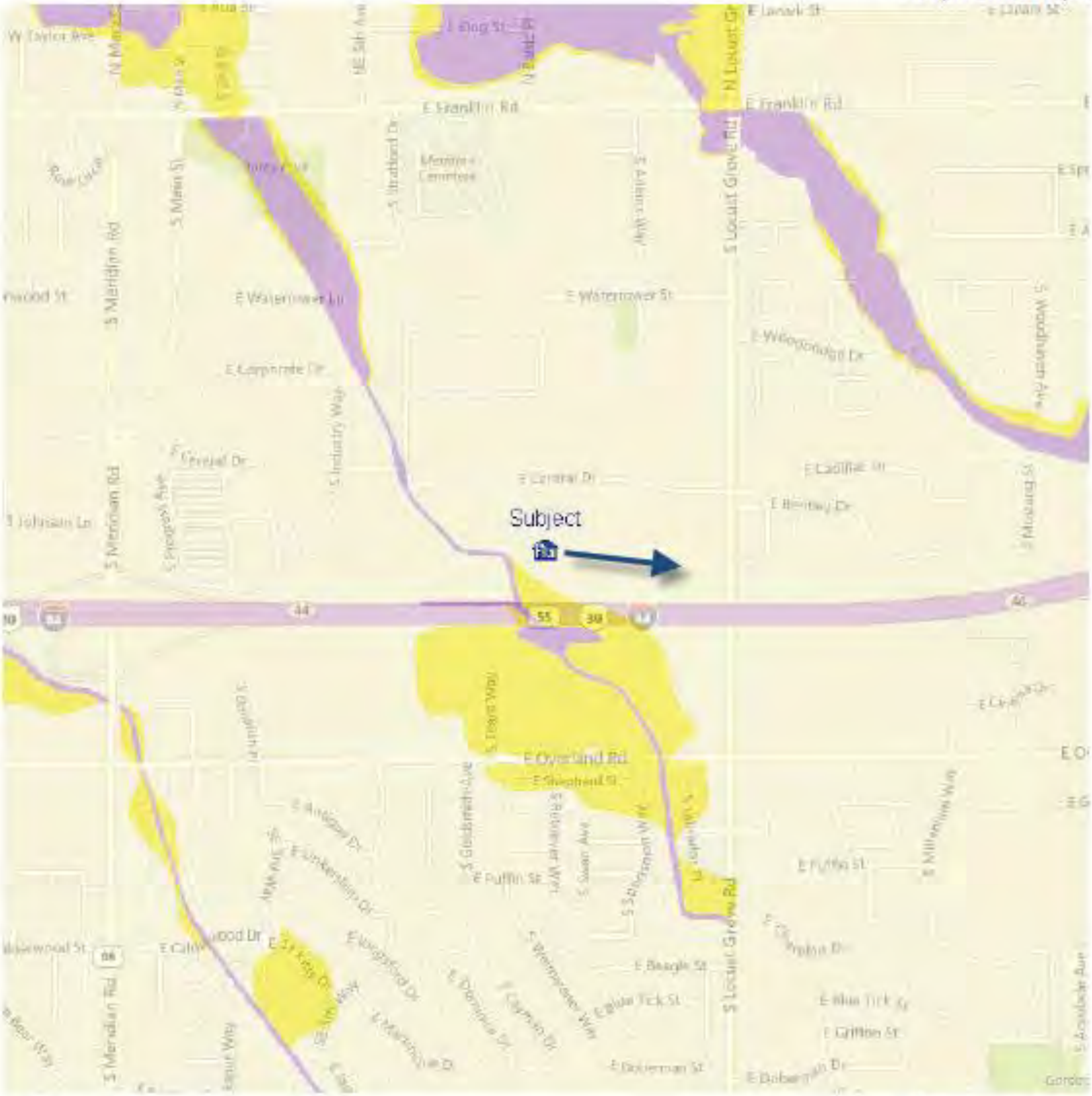
NUMBER	LENGTH	RADIUS	DELTA	TANGENT	CHORD BEARING	CHORD LENGTH
C1	66.01	95.00	39°48'41"	34.40	S 64°48'36" E	64.69
C2	37.04	148.00	14°20'27"	18.62	S 83°10'13" E	36.95
C3	54.79	212.00	14°48'32"	27.55	S 83°24'16" E	54.64

STDB

You are currently logged in as: (CUSTID_17366) on 23-Mar-2016

Interstate 84, Meridian, ID

I-84, MERIDIAN, ID



MAP DATA

Map Number : **16001C0231H**

Panel Date : **February 19,2003**

FIPS Code :

Census Tract :

Geo Result : **S4 - single close match, point located at the center of shape point path**

Flood
X or C Zone
X500 or B Zone
A Zone
V Zone
D Zone
Area Not Mapped

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This Report is for the sole benefit of the Customer that ordered and paid for the Report and is based on the property information provided by that Customer. That Customer's use of this Report is subject to the terms agreed to by that Customer when accessing this product. No third party is authorized to use or rely on this Report for any purpose. THE SELLER OF THIS REPORT MAKES NO REPRESENTATIONS OR WARRANTIES TO ANY PARTY CONCERNING THE CONTENT, ACCURACY OR COMPLETENESS OF THIS REPORT, INCLUDING ANY WARRANTY OF MERCHANTABILITY OR FITNESS FOR A PARTICULAR PURPOSE. The seller of this Report shall not have any liability to any third party for any use or misuse of this Report.

What do the different flood zones mean?

The following table gives an explanation of the flood zone designations used by First American Flood Data Services:

Zone	*Zone Name*	*Description*
100	Area in SFHA	This is an area inundated by 100-year flooding for which BFEs or velocity may have been determined. No distinctions are made between the different flood hazard zones that may be included within the SFHA.
100IC	100-year Flood Discharge Contained in Channel	An area where the 100-year flooding is contained within the channel banks and the channel is too narrow to show to scale. An arbitrary channel width of 3 meters is shown.
A	Zone A	An area inundated by 100 year flooding, for which no BFEs have been established.
A99	Zone A99	An area inundated by 100-year flooding, for which no BFEs have been determined. This is an area to be protected from the 100-year flood by a Federal flood protection system under construction.
AE	Zone AE	An area inundated by 100-year flooding, for which BFEs have been determined.
AH	Zone AH	An area inundated by 100-year flooding (usually an area of ponding), for which BFEs have been determined; flood depths range from 1 to 3 feet.
ANI	Area Not Included	An area that is located within a community or county that is not mapped on any published FIRM.
AO	Zone AO	An area inundated by 100-year flooding (usually sheet flow on sloping terrain), for which average depths have been determined; flood depths range from 1 to 3 feet.
AR	Zone AR	An area inundated by flooding, for which BFEs or average depths have been determined.
B	Zone B	An area inundated by 500-year flooding; an area inundated by 100-year flooding with average depths of less than 1 foot or with drainage areas less than 1 square mile; or an area protected by levees from 100-year flooding.
BE	Zone BE	An area inundated by 500-year flooding; an area inundated by 100-year flooding with average depths of less than 1 foot or with drainage areas less than 1 square mile; or an area protected by levees from 100-year flooding.
BL	Zone B Protected By Levee	Areas protected from the 1% annual chance flood by levees. No Base Flood Elevations or depths are shown within this zone.
BX	Zone BX	An area inundated by 500-year flooding; an area inundated by 100-year flooding with average depths of less than 1 foot or with drainage areas less than 1 square mile; or an area protected by levees from 100-year flooding.
C	Zone C	An area that is determined to be outside the 100- and 500-year floodplains.
CE	Zone CE	An area that is determined to be outside the 100- and 500-year floodplains.
CX	Zone CX	An area that is determined to be outside the 100- and 500-year floodplains.
D	Zone D	An area of undetermined but possible flood hazards.
FW	Floodway	An area that includes the channel of a river or other watercourse (Usually adjacent to Zone AE).
FWIC	Floodway Contained in Channel	An area where the floodway is contained within the channel banks and the channel is too narrow to show to scale. An arbitrary channel width of 3 meters is shown. BFEs are not shown in this area, although they may be reflected on the corresponding profile
IN	Area In SFHA	This is an area inundated by 100-year flooding for which BFEs or velocity may have been determined. No distinctions are made between the different flood hazard zones that may be included within the SFHA.
NM	Area Not Mapped	An area that is located within a community or county that is not mapped on any published FIRM.
OUT	Area Not Mapped	An area designated as outside a "Special Flood Hazard Area" (or SFHA) on a FIRM. This is an area inundated by 500-year flooding; an area inundated by 100-year flooding with average depths of less than 1 foot or with drainage areas less than 1 square mile
OW	Open Water	A body of open water, such as a large pond, lake, bay, ocean, etc., located within a community's jurisdictional limits, that has no defined flood hazard.
UNDES	Area of Undesignated Flood Hazard	A body of open water, such as a pond, lake ocean, etc., located within a community's jurisdictional limits, that has no defined flood hazard.

V	Zone V	An area inundated by 100-year flooding with velocity hazard (wave action); no BFEs have been determined.
VE	Zone VE	An area inundated by 100-year flooding with velocity hazard (wave action); BFEs have been determined.
X	Zone X	An area that is determined to be outside the 100- and 500-year floodplains.
X5	Zone X (500-year)	An area inundated by 500-year flooding; an area inundated by 100-year flooding with average depths of less than 1 foot or with drainage areas less than 1 square mile; or an area protected by levees from 100-year flooding.
X500	Zone X (500-year)	An area inundated by 500-year flooding; an area inundated by 100-year flooding with average depths of less than 1 foot or with drainage areas less than 1 square mile; or an area protected by levees from 100-year flooding.
X500IC	500-year Flood Discharge Contained in Channel	An area where the 500-year flooding is contained within the channel banks and the channel is too narrow to show to scale. An arbitrary channel width of 3 meters is shown.
X500L	Zone X500 Protected By Levee	Areas protected from the 1% annual chance flood by levees. No Base Flood Elevations or depths are shown within this zone.
A1	Zone A1	An area inundated by 100 year flooding, for which no BFEs have been established.
A2	Zone A2	An area inundated by 100 year flooding, for which no BFEs have been established.
A3	Zone A3	An area inundated by 100 year flooding, for which no BFEs have been established.
A4	Zone A4	An area inundated by 100 year flooding, for which no BFEs have been established.
A5	Zone A5	An area inundated by 100 year flooding, for which no BFEs have been established.
A6	Zone A6	An area inundated by 100 year flooding, for which no BFEs have been established.
A7	Zone A7	An area inundated by 100 year flooding, for which no BFEs have been established.
A8	Zone A8	An area inundated by 100 year flooding, for which no BFEs have been established.
A9	Zone A9	An area inundated by 100 year flooding, for which no BFEs have been established.
A10	Zone A10	An area inundated by 100 year flooding, for which no BFEs have been established.
A11	Zone A11	An area inundated by 100 year flooding, for which no BFEs have been established.
A12	Zone A12	An area inundated by 100 year flooding, for which no BFEs have been established.
A13	Zone A13	An area inundated by 100 year flooding, for which no BFEs have been established.
A14	Zone A14	An area inundated by 100 year flooding, for which no BFEs have been established.
A15	Zone A15	An area inundated by 100 year flooding, for which no BFEs have been established.
A16	Zone A16	An area inundated by 100 year flooding, for which no BFEs have been established.
A17	Zone A17	An area inundated by 100 year flooding, for which no BFEs have been established.
A18	Zone A18	An area inundated by 100 year flooding, for which no BFEs have been established.
A19	Zone A19	An area inundated by 100 year flooding, for which no BFEs have been established.
A20	Zone A20	An area inundated by 100 year flooding, for which no BFEs have been established.
A21	Zone A21	An area inundated by 100 year flooding, for which no BFEs have been established.
A22	Zone A22	An area inundated by 100 year flooding, for which no BFEs have been established.
A23	Zone A23	An area inundated by 100 year flooding, for which no BFEs have been established.
A24	Zone A24	An area inundated by 100 year flooding, for which no BFEs have been established.
A25	Zone A25	An area inundated by 100 year flooding, for which no BFEs have been established.
A26	Zone A26	An area inundated by 100 year flooding, for which no BFEs have been established.
A27	Zone A27	An area inundated by 100 year flooding, for which no BFEs have been established.
A28	Zone A28	An area inundated by 100 year flooding, for which no BFEs have been established.
A29	Zone A29	An area inundated by 100 year flooding, for which no BFEs have been established.
A30	Zone A30	An area inundated by 100 year flooding, for which no BFEs have been established.

V0	Zone V0	An area inundated by 100-year flooding with velocity hazard (wave action); no BFEs have been determined.
V1	Zone V1	An area inundated by 100-year flooding with velocity hazard (wave action); no BFEs have been determined.
V2	Zone V2	An area inundated by 100-year flooding with velocity hazard (wave action); no BFEs have been determined.
V3	Zone V3	An area inundated by 100-year flooding with velocity hazard (wave action); no BFEs have been determined.
V4	Zone V4	An area inundated by 100-year flooding with velocity hazard (wave action); no BFEs have been determined.
V5	Zone V5	An area inundated by 100-year flooding with velocity hazard (wave action); no BFEs have been determined.
V6	Zone V6	An area inundated by 100-year flooding with velocity hazard (wave action); no BFEs have been determined.
V7	Zone V7	An area inundated by 100-year flooding with velocity hazard (wave action); no BFEs have been determined.
V8	Zone V8	An area inundated by 100-year flooding with velocity hazard (wave action); no BFEs have been determined.
V9	Zone V9	An area inundated by 100-year flooding with velocity hazard (wave action); no BFEs have been determined.
V10	Zone V10	An area inundated by 100-year flooding with velocity hazard (wave action); no BFEs have been determined.
V11	Zone V11	An area inundated by 100-year flooding with velocity hazard (wave action); no BFEs have been determined.
V12	Zone V12	An area inundated by 100-year flooding with velocity hazard (wave action); no BFEs have been determined.
V13	Zone V13	An area inundated by 100-year flooding with velocity hazard (wave action); no BFEs have been determined.
V14	Zone V14	An area inundated by 100-year flooding with velocity hazard (wave action); no BFEs have been determined.
V15	Zone V15	An area inundated by 100-year flooding with velocity hazard (wave action); no BFEs have been determined.
V16	Zone V16	An area inundated by 100-year flooding with velocity hazard (wave action); no BFEs have been determined.
V17	Zone V17	An area inundated by 100-year flooding with velocity hazard (wave action); no BFEs have been determined.
V18	Zone V18	An area inundated by 100-year flooding with velocity hazard (wave action); no BFEs have been determined.
V19	Zone V19	An area inundated by 100-year flooding with velocity hazard (wave action); no BFEs have been determined.
V20	Zone V20	An area inundated by 100-year flooding with velocity hazard (wave action); no BFEs have been determined.
V21	Zone V21	An area inundated by 100-year flooding with velocity hazard (wave action); no BFEs have been determined.
V22	Zone V22	An area inundated by 100-year flooding with velocity hazard (wave action); no BFEs have been determined.
V23	Zone V23	An area inundated by 100-year flooding with velocity hazard (wave action); no BFEs have been determined.
V24	Zone V24	An area inundated by 100-year flooding with velocity hazard (wave action); no BFEs have been determined.
V25	Zone V25	An area inundated by 100-year flooding with velocity hazard (wave action); no BFEs have been

		determined.
V26	Zone V26	An area inundated by 100-year flooding with velocity hazard (wave action); no BFEs have been determined.
V27	Zone V27	An area inundated by 100-year flooding with velocity hazard (wave action); no BFEs have been determined.
V28	Zone V28	An area inundated by 100-year flooding with velocity hazard (wave action); no BFEs have been determined.
V29	Zone V29	An area inundated by 100-year flooding with velocity hazard (wave action); no BFEs have been determined.
V30	Zone V30	An area inundated by 100-year flooding with velocity hazard (wave action); no BFEs have been determined.
Z	Area of Unknown Flood Hazard	An area of Data Discrepancy or an Unclaimed Area. Internal TFHC designation.
N	Area Not Mapped	An area that is located within a community or county that is not mapped on any published FIRM (Usually a community not participating in NFIP). Internal TFHC designation.
AR/A	Zone AR/A	An area inundated by flooding, for which BFEs or average depths have not been determined.
AR/AE	Zone AR/AE	An area inundated by flooding, for which BFEs or average depths have been determined.
AR/AH	Zone AR/AH	An area inundated by flooding, for which BFEs or average depths have been determined.

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Addenda

Glossary

Definitions are taken from the Dictionary of Real Estate Appraisal, 5th Edition (Dictionary), the Uniform Standards of Professional Appraisal Practice (USPAP) and Building Owners and Managers Association International (BOMA).

Absolute Net Lease

A lease in which the tenant pays all expenses including structural maintenance, building reserves, and management; often a long-term lease to a credit tenant. (Dictionary)

Additional Rent

Any amounts due under a lease that is in addition to base rent. Most common form is operating expense increases. (Dictionary)

Amortization

The process of retiring a debt or recovering a capital investment, typically though scheduled, systematic repayment of the principal; a program of periodic contributions to a sinking fund or debt retirement fund. (Dictionary)

As Is Market Value

The estimate of the market value of real property in its current physical condition, use, and zoning as of the appraisal date. (Dictionary)

Base (Shell) Building

The existing shell condition of a building prior to the installation of tenant improvements. This condition varies from building to building, landlord to landlord, and generally involves the level of finish above the ceiling grid. (Dictionary)

Base Rent

The minimum rent stipulated in a lease. (Dictionary)

Base Year

The year on which escalation clauses in a lease are based. (Dictionary)

Building Common Area

The areas of the building that provide services to building tenants but which are not included in the rentable area of any specific tenant. These areas may include, but shall not be limited to, main and auxiliary lobbies, atrium spaces at the level of the finished floor, concierge areas or security desks, conference rooms, lounges or vending areas food service facilities, health or fitness centers, daycare facilities, locker or shower facilities, mail rooms, fire control rooms, fully enclosed courtyards outside the exterior walls, and building core and service areas such as fully enclosed mechanical or equipment rooms. Specifically excluded from building common areas are; floor common areas, parking spaces, portions of loading docks outside the building line, and major vertical penetrations. (BOMA)

Building Rentable Area

The sum of all floor rentable areas. Floor rentable area is the result of subtracting from the gross measured area of a floor the major vertical penetrations on that same floor. It is generally fixed for the life of the building and is rarely affected by changes in corridor size or configuration. (BOMA)

Certificate of Occupancy (COO)

A statement issued by a local government verifying that a newly constructed building is in compliance with all codes and may be occupied.

Common Area (Public) Factor

In a lease, the common area (public) factor is the multiplier to a tenant's useable space that accounts for the tenant's proportionate share of the common area (restrooms, elevator lobby, mechanical rooms, etc.). The public factor is usually expressed as a percentage and ranges from a low of 5 percent for a full tenant to as high as 15 percent or more for a multi-tenant floor. Subtracting one (1) from the quotient of the rentable area divided by the useable area yields the load (public) factor. At times confused with the "loss factor" which is the total rentable area of the full floor less the useable area divided by the rentable area. (BOMA)

Common Area Maintenance (CAM)

The expense of operating and maintaining common areas; may or may not include management charges and usually does not include capital expenditures on tenant improvements or other improvements to the property.

CAM can be a line-item expense for a group of items that can include maintenance of the parking lot and landscaped areas and sometimes the exterior walls of the buildings. CAM can refer to all operating expenses.

CAM can refer to the reimbursement by the tenant to the landlord for all expenses reimbursable under the lease. Sometimes reimbursements have what is called an administrative load. An example would be a 15 percent addition to total operating expenses, which are then prorated among tenants. The administrative load, also called an administrative and marketing fee, can be a substitute for or an addition to a management fee. (Dictionary)

Condominium

A form of ownership in which each owner possesses the exclusive right to use and occupy an allotted unit plus an undivided interest in common areas.

A multiunit structure, or a unit within such a structure, with a condominium form of ownership. (Dictionary)

Conservation Easement

An interest in real property restricting future land use to preservation, conservation, wildlife habitat, or some combination of those uses. A conservation easement may permit farming, timber harvesting, or other uses of a rural nature to continue, subject to the easement. In some locations, a conservation easement may be referred to as a conservation restriction. (Dictionary)

Contributory Value

The change in the value of a property as a whole, whether positive or negative, resulting from the addition or deletion of a property component. Also called deprival value in some countries. (Dictionary)

Debt Coverage Ratio (DCR)

The ratio of net operating income to annual debt service (DCR = NOI/Im), which measures the relative ability to a property to meet its debt service out of net operating income. Also called Debt Service Coverage Ratio (DSCR). A larger DCR indicates a greater ability for a property to withstand a downturn in revenue, providing an improved safety margin for a lender. (Dictionary)

Deed Restriction

A provision written into a deed that limits the use of land. Deed restrictions usually remain in effect when title passes to subsequent owners. (Dictionary)

Depreciation

1) In appraising, the loss in a property value from any cause; the difference between the cost of an improvement on the effective date of the appraisal and the market value of the improvement on the same date. 2) In accounting, an allowance made against the loss in value of an asset for a defined purpose and computed using a specified method. (Dictionary)

Disposition Value

The most probable price that a specified interest in real property is likely to bring under the following conditions:

- Consummation of a sale within a exposure time specified by the client;
- The property is subjected to market conditions prevailing as of the date of valuation;
- Both the buyer and seller are acting prudently and knowledgeably;
- The seller is under compulsion to sell;
- The buyer is typically motivated;
- Both parties are acting in what they consider to be their best interests;
- An adequate marketing effort will be made during the exposure time specified by the client;
- Payment will be made in cash in U.S. dollars or in terms of financial arrangements comparable thereto; and
- The price represents the normal consideration for the property sold, unaffected by special or creative financing or sales concessions granted by anyone associated with the sale. (Dictionary)

Easement

The right to use another's land for a stated purpose. (Dictionary)

EIFS

Exterior Insulation Finishing System. This is a type of exterior wall cladding system. Sometimes referred to as dry-vit.

Effective Date

1) The date at which the analyses, opinions, and advice in an appraisal, review, or consulting service apply. 2) In a lease document, the date upon which the lease goes into effect. (Dictionary)

Effective Rent

The rental rate net of financial concessions such as periods of no rent during the lease term and above- or below-market tenant improvements (TIs). (Dictionary)

EPDM

Ethylene Diene Monomer Rubber. A type of synthetic rubber typically used for roof coverings. (Dictionary)

Escalation Clause
A clause in an agreement that provides for the adjustment of a price or rent based on some event or index. e.g., a provision to increase rent if operating expenses increase; also called an expense recovery clause or stop clause. (Dictionary)

Estoppel Certificate
A statement of material factors or conditions of which another person can rely because it cannot be denied at a later date. In real estate, a buyer of rental property typically requests estoppel certificates from existing tenants. Sometimes referred to as an estoppel letter. (Dictionary)

Excess Land
Land that is not needed to serve or support the existing improvement. The highest and best use of the excess land may or may not be the same as the highest and best use of the improved parcel. Excess land may have the potential to be sold separately and is valued separately. (Dictionary)

Expense Stop
A clause in a lease that limits the landlord's expense obligation, which results in the lessee paying any operating expenses above a stated level or amount. (Dictionary)

Exposure Time
1) The time a property remains on the market. 2) The estimated length of time the property interest being appraised would have been offered on the market prior to the hypothetical consummation of a sale at market value on the effective date of the appraisal; a retrospective estimate based on an analysis of past events assuming a competitive and open market. (Dictionary)

Extraordinary Assumption
An assumption, directly related to a specific assignment, which, if found to be false, could alter the appraiser's opinions or conclusions. Extraordinary assumptions presume as fact otherwise uncertain information about physical, legal, or economic characteristics of the subject property; or about conditions external to the property such as market conditions or trends; or about the integrity of data used in an analysis. (Dictionary)

Fair Market Value
The price at which the property should change hands between a willing buyer and a willing seller, neither being under any compulsion to buy or sell and both having reasonable knowledge of relevant facts. [Treas. Reg. 20.2031-1(b); Rev. Rul. 59-60. 1959-1 C.B. 237]

Fee Simple Estate
Absolute ownership unencumbered by any other interest or estate, subject only to the limitations imposed by the governmental powers of taxation, eminent domain, police power, and escheat. (Dictionary)

Floor Common Area
Areas on a floor such as washrooms, janitorial closets, electrical rooms, telephone rooms, mechanical rooms, elevator lobbies, and public corridors which are available primarily for the use of tenants on that floor. (BOMA)

Full Service (Gross) Lease
A lease in which the landlord receives stipulated rent and is obligated to pay all of the property's operating and fixed expenses; also called a full service lease. (Dictionary)

Going Concern Value
- The market value of all the tangible and intangible assets of an established and operating business with an indefinite life, as if sold in aggregate; more accurately termed the market value of the going concern.
- The value of an operating business enterprise. Goodwill may be separately measured but is an integral component of going-concern value when it exists and is recognizable. (Dictionary)

Gross Building Area
The total constructed area of a building. It is generally not used for leasing purposes (BOMA)

Gross Measured Area
The total area of a building enclosed by the dominant portion (the portion of the inside finished surface of the permanent outer building wall which is 50 percent or more of the vertical floor-to-ceiling dimension, at the given point being measured as one moves horizontally along the wall), excluding parking areas and loading docks (or portions of the same) outside the building line. It is generally not used for leasing purposes and is calculated on a floor by floor basis. (BOMA)

Gross Up Method
A method of calculating variable operating expense in income-producing properties when less than 100

percent occupancy is assumed. The gross up method approximates the actual expense of providing services to the rentable area of a building given a specified rate of occupancy. (Dictionary)

Ground Lease
A lease that grants the right to use and occupy land. Improvements made by the ground lessee typically revert to the ground lessor at the end of the lease term. (Dictionary)

Ground Rent
The rent paid for the right to use and occupy land according to the terms of a ground lease; the portion of the total rent allocated to the underlying land. (Dictionary)

HVAC
Heating, ventilation, air conditioning. A general term encompassing any system designed to heat and cool a building in its entirety.

Highest & Best Use
The reasonably probable and legal use of vacant land or an improved property that is physically possible, appropriately supported, financially feasible, and that results in the highest value. The four criteria the highest and best use must meet are 1) legal permissibility, 2) physical possibility, 3) financial feasibility, and 4) maximally profitability. Alternatively, the probable use of land or improved –specific with respect to the user and timing of the use–that is adequately supported and results in the highest present value. (Dictionary)

Hypothetical Condition
That which is contrary to what exists but is supposed for the purpose of analysis. Hypothetical conditions assume conditions contrary to known facts about physical, legal, or economic characteristics of the subject property; or about conditions external to the property, such as market conditions or trends; or about the integrity of data used in an analysis. (Dictionary)

Industrial Gross Lease
A lease of industrial property in which the landlord and tenant share expenses. The landlord receives stipulated rent and is obligated to pay certain operating expenses, often structural maintenance, insurance and real estate taxes as specified in the lease. There are significant regional and local differences in the use of this term. (Dictionary)

Insurable Value
A type of value for insurance purposes. (Dictionary) (Typically this includes replacement cost less basement excavation, foundation, underground piping and architect's fees).

Investment Value
The value of a property interest to a particular investor or class of investors based on the investor's specific requirements. Investment value may be different from market value because it depends on a set of investment criteria that are not necessarily typical of the market. (Dictionary)

Just Compensation
In condemnation, the amount of loss for which a property owner is compensated when his or her property is taken. Just compensation should put the owner in as good a position as he or she would be if the property had not been taken. (Dictionary)

Leased Fee Interest
A freehold (ownership interest) where the possessory interest has been granted to another party by creation of a contractual landlord-tenant relationship (i.e., a lease). (Dictionary)

Leasehold Interest
The tenant's possessory interest created by a lease. (Dictionary)

Lessee (Tenant)
One who has the right to occupancy and use of the property of another for a period of time according to a lease agreement. (Dictionary)

Lessor (Landlord)
One who conveys the rights of occupancy and use to others under a lease agreement. (Dictionary)

Liquidation Value
The most probable price that a specified interest in real property should bring under the following conditions:

- Consummation of a sale within a short period.
- The property is subjected to market conditions prevailing as of the date of valuation.
- Both the buyer and seller are acting prudently and knowledgeably.
- The seller is under extreme compulsion to sell.
- The buyer is typically motivated.
- Both parties are acting in what they consider to be their best interests.

- A normal marketing effort is not possible due to the brief exposure time.
- Payment will be made in cash in U.S. dollars or in terms of financial arrangements comparable thereto.
- The price represents the normal consideration for the property sold, unaffected by special or creative financing or sales concessions granted by anyone associated with the sale. (Dictionary)

Loan to Value Ratio (LTV)
The amount of money borrowed in relation to the total market value of a property. Expressed as a percentage of the loan amount divided by the property value. (Dictionary)

Major Vertical Penetrations
Stairs, elevator shafts, flues, pipe shafts, vertical ducts, and the like, and their enclosing walls. Atria, lightwells and similar penetrations above the finished floor are included in this definition. Not included, however, are vertical penetrations built for the private use of a tenant occupying office areas on more than one floor. Structural columns, openings for vertical electric cable or telephone distribution, and openings for plumbing lines are not considered to be major vertical penetrations. (BOMA)

Market Rent
The most probable rent that a property should bring in a competitive and open market reflecting all conditions and restrictions of the lease agreement including permitted uses, use restrictions, expense obligations; term, concessions, renewal and purchase options and tenant improvements (TIs). (Dictionary)

Market Value
The most probable price which a property should bring in a competitive and open market under all conditions requisite to a fair sale, the buyer and seller each acting prudently and knowledgeably, and assuming the price is not affected by undue stimulus. Implicit in this definition is the consummation of a sale as of a specified date and the passing of title from seller to buyer under conditions whereby:

a. Buyer and seller are typically motivated;
b. Both parties are well informed or well advised, and acting in what they consider their own best interests;
c. A reasonable time is allowed for exposure in the open market;
d. Payment is made in terms of cash in United States dollars or in terms of financial arrangements comparable thereto; and
e. The price represents the normal consideration for the property sold unaffected by special or creative financing or sales concessions granted by anyone associated with the sale.

Market Value As If Complete
Market value as if complete means the market value of the property with all proposed construction, conversion or rehabilitation hypothetically completed or under other specified hypothetical conditions as of the date of the appraisal. With regard to properties wherein anticipated market conditions indicate that stabilized occupancy is not likely as of the date of completion, this estimate of value shall reflect the market value of the property as if complete and prepared for occupancy by tenants.

Market Value As If Stabilized
Market value as if stabilized means the market value of the property at a current point and time when all improvements have been physically constructed and the property has been leased to its optimum level of long term occupancy.

Marketing Time
An opinion of the amount of time it might take to sell a real or personal property interest at the concluded market value level during the period immediately after the effective date of the appraisal. Marketing time differs from exposure time, which is always presumed to precede the effective date of an appraisal. (Advisory Opinion 7 of the Standards Board of the Appraisal Foundation and Statement on Appraisal Standards No. 6, “Reasonable Exposure Time in Real Property and Personal Property Market Value Opinions” address the determination of reasonable exposure and marketing time). (Dictionary)

Master Lease
A lease in which the fee owner leases a part or the entire property to a single entity (the master lease) in return for a stipulated rent. The master lessee then leases the property to multiple tenants. (Dictionary)

Modified Gross Lease
A lease in which the landlord receives stipulated rent and is obligated to pay some, but not all, of the property’s operating and fixed expenses. Since assignment of expenses varies among modified gross leases, expense responsibility must always be specified. In some markets, a modified gross lease

may be called a double net lease, net net lease, partial net lease, or semi-gross lease. (Dictionary)

Option
A legal contract, typically purchased for a stated consideration, that permits but does not require the holder of the option (known as the optionee) to buy, sell, or lease real property for a stipulated period of time in accordance with specified terms; a unilateral right to exercise a privilege. (Dictionary)

Partial Interest
Divided or undivided rights in real estate that represent less than the whole (a fractional interest). (Dictionary)

Pass Through
A tenant's portion of operating expenses that may be composed of common area maintenance (CAM), real estate taxes, property insurance, and any other expenses determined in the lease agreement to be paid by the tenant. (Dictionary)

Prospective Future Value Upon Completion
Market value "upon completion" is a prospective future value estimate of a property at a point in time when all of its improvements are fully completed. It assumes all proposed construction, conversion, or rehabilitation is hypothetically complete as of a future date when such effort is projected to occur. The projected completion date and the value estimate must reflect the market value of the property in its projected condition, i.e., completely vacant or partially occupied. The cash flow must reflect lease-up costs, required tenant improvements and leasing commissions on all areas not leased and occupied.

Prospective Future Value Upon Stabilization
Market value "upon stabilization" is a prospective future value estimate of a property at a point in time when stabilized occupancy has been achieved. The projected stabilization date and the value estimate must reflect the absorption period required to achieve stabilization. In addition, the cash flows must reflect lease-up costs, required tenant improvements and leasing commissions on all unleased areas.

Replacement Cost
The estimated cost to construct, at current prices as of the effective appraisal date, a substitute for the building being appraised, using modern materials and current standards, design, and layout. (Dictionary)

Reproduction Cost
The estimated cost to construct, at current prices as of the effective date of the appraisal, an exact duplicate or replica of the building being appraised, using the same materials, construction standards, design, layout, and quality of workmanship and embodying all of the deficiencies, super-adequacies, and obsolescence of the subject building. (Dictionary)

Retrospective Value Opinion
A value opinion effective as of a specified historical date. The term does not define a type of value. Instead, it identifies a value opinion as being effective at some specific prior date. Value as of a historical date is frequently sought in connection with property tax appeals, damage models, lease renegotiation, deficiency judgments, estate tax, and condemnation. Inclusion of the type of value with this term is appropriate, e.g., "retrospective market value opinion." (Dictionary)

Sandwich Leasehold Estate
The interest held by the original lessee when the property is subleased to another party; a type of leasehold estate. (Dictionary)

Sublease
An agreement in which the lessee (i.e., the tenant) leases part or all of the property to another party and thereby becomes a lessor. (Dictionary)

Subordination
A contractual arrangement in which a party with a claim to certain assets agrees to make his or her claim junior, or subordinate, to the claims of another party. (Dictionary)

Substantial Completion
Generally used in reference to the construction of tenant improvements (TIs). The tenant's premises are typically deemed to be substantially completed when all of the TIs for the premises have been completed in accordance with the plans and specifications previously approved by the tenant. Sometimes used to define the commencement date of a lease.

Surplus Land
Land that is not currently needed to support the existing improvement but cannot be separated from the property and sold off. Surplus land does not have an independent highest and best use and may or may not contribute value to the improved parcel. (Dictionary)

Triple Net (Net Net Net) Lease

A lease in which the tenant assumes all expenses (fixed and variable) of operating a property except that the landlord is responsible for structural maintenance, building reserves, and management. Also called NNN, triple net leases, or fully net lease. (Dictionary)

(The market definition of a triple net leases varies; in some cases tenants pay for items such as roof repairs, parking lot repairs, and other similar items.)

Usable Area

The measured area of an office area, store area or building common area on a floor. The total of all the usable areas or a floor shall equal floor usable area of that same floor. The amount of floor usable area can vary over the life of a building as corridors expand and contract and as floors are remodeled. (BOMA)

Value-in-Use

The value of a property assuming a specific use, which may or may not be the property's highest and best use on the effective date of the appraisal. Value in use may or may not be equal to market value but is different conceptually. (Dictionary)

Valbridge PROPERTY ADVISORS

SERVICES

Valuation and Advisory Services for All Types of Property and Land

- **Office**
- **Industrial**
- **Retail**
- **Apartments/multifamily/senior living**
- **Lodging/hospitality/recreational**
- **Other special-purpose properties**

SPECIALTY SERVICES

- Portfolio valuation
- REO/foreclosure evaluation
- Real estate market and feasibility analysis
- Property and lease comparables, including lease review
- Due diligence
- Property tax assessment and appeal-support services
- Valuations and analysis of property under eminent domain proceedings
- Valuations of property for financial reporting, including goodwill impairment, impairment or disposal of long-lived assets, fair value and leasehold valuations
- Valuation of property for insurance, estate planning and trusteeship, including fractional interest valuation for gifting and IRS purposes
- Litigation support, including expert witness testimony
- Business and partnership valuation and advisory services, including partial interests

Independent Valuations for a Variable World valbridge.com

Valbridge
PROPERTY ADVISORS

OFFICE LOCATIONS

ALABAMA

Valbridge Property Advisors | Real Estate Appraisers, LLC
4732 Woodmere Boulevard
Montgomery, AL 36106
334-277-5077

ARIZONA

Valbridge Property Advisors | MJN Enterprises, Inc.
6061 E. Grant Road, Suite 121
Tucson, AZ 85712
520-321-0000

CALIFORNIA

Valbridge Property Advisors | Michael Burger & Associates
4915 Calloway Drive, Suite 101
Bakersfield, CA 93312
661-587-1010

Valbridge Property Advisors | Cummings Appraisal Group, Inc.
99 S. Lake Avenue, Suite 21
Pasadena, CA 91101
626-744-0428

Valbridge Property Advisors | Hulberg & Associates, Inc.
225 Crossroads Blvd, Suite 326
Carmel, CA 93923
831-917-0383

2813 Coffee Road, Suite E-2
Modesto, CA 95355
209-569-0450

One North Market Street
San Jose, CA 95113
408-279-1520

3160 Crow Canyon Place, Suite 245
San Ramon, CA 94583
925-327-1660

Valbridge Property Advisors | Penner & Associates, Inc.
1370 N. Brea Boulevard, Suite 255
Fullerton, CA 92835
714-449-0852

Valbridge Property Advisors | Ribacchi & Associates
10301 Placer Lane, Suite 100
Sacramento, CA 95827
916-361-2509

COLORADO

Valbridge Property Advisors | Bristol Realty Counselors
5345 Arapahoe, Suite 7
Boulder, CO 80303
303-443-9600

Valbridge Property Advisors | Mountain West
562 Highway 133
Carbondale, CO 81623
970-340-1016

CONNECTICUT

Valbridge Property Advisors | Italia & Lemp, Inc.
6 Central Row, Third Floor
Hartford, CT 06103-2701
860-246-4606

17 High Street, Suite 214
Norwalk, CT 06851
203-286-6520

FLORIDA

Valbridge Property Advisors | Armalavage Valuation, LLC
2240 Venetian Court
Naples, FL 34109
239-514-4646

Valbridge Property Advisors | Beaumont, Matthes & Church, Inc.
603 Hillcrest Street
Orlando, FL 32803
407-839-3626

Valbridge Property Advisors | Boyd, Schmidt & Brannum
2711 Poinsettia Avenue
West Palm Beach, FL 33407
561-833-5331

Valbridge Property Advisors | Broom, Moody, Johnson & Grainger, Inc.
121 West Forsyth Street, Suite 1000
Jacksonville, FL 32202
904-296-3000

Valbridge Property Advisors | Entreken Associates, Inc.
1100 16th Street N
St. Petersburg, FL 33705
727-894-1800

GEORGIA

Valbridge Property Advisors | Cantrell Miller, LLC
2675 Paces Ferry Road, Suite 145
Atlanta, GA 30339
678-644-4853

IDAHO

Valbridge Property Advisors | Auble, Jolicoeur & Gentry, Inc.
1875 N. Lakewood Drive, Suite 100
Coeur d'Alene, ID 83814
208-292-2965

Valbridge Property Advisors | Mountain States Appraisal & Consulting, Inc.
1459 Tyrell Lane, Suite B
Boise, ID 83706
208-336-1097

INDIANA

Valbridge Property Advisors | Mitchell Appraisals, Inc.
820 Fort Wayne Avenue
Indianapolis, IN 46204
317-687-2747

KANSAS

Valbridge Property Advisors | Shaner Appraisals, Inc.
10990 Quivira, Suite 100
Overland Park, KS 66210
913-451-1451

KENTUCKY

Valbridge Property Advisors | Allgeier Company
214 South 8th Street, Suite 200
Louisville, KY 40202
502-585-3651

LOUISIANA

Valbridge Property Advisors | Argote, Derbes, Graham, Shuffield & Tatje, Inc.
512 North Causeway Boulevard
Metairie, LA 70001
504-833-8234

7607 Fern Avenue, Suite 104
Shreveport, LA 71105
318-797-0543

MARYLAND

Valbridge Property Advisors | Lipman Frizzell & Mitchell LLC
6240 Old Dobbin Lane, Suite 140
Columbia, MD 21045
410-423-2300

MASSACHUSETTS

Valbridge Property Advisors | Bullock Commercial Appraisal, LLC
21 Muzzey Street, Suite 2
Lexington, MA 02421
781-652-0700

MICHIGAN

Valbridge Property Advisors | The Oetzel-Hartman Group
2127 University Park Drive, Suite 390
Okemos, Michigan 48864
517-336-0001

MINNESOTA

Valbridge Property Advisors | Mardell Partners, Inc.
120 South 6th Street, Suite 1650
Minneapolis, MN 55402
612-253-0650

NEVADA

Valbridge Property Advisors | Lubawy & Associates, Inc.
3034 S. Durango Drive, Suite 100
Las Vegas, NV 89117
702-242-9369

NEW JERSEY

Valbridge Property Advisors | Oxford Group
2740 Route 10 West, Suite 204
Morris Plains, NJ 07950
973-970-9333

2052 Route 35, Suite 104
Wall Township, NJ 07719
732-807-3113

NEW YORK

Valbridge Property Advisors | Oxford Group
424 West 33rd Street, Suite 630
New York, NY 10001
212-268-1113

NORTH CAROLINA

Valbridge Property Advisors | John Bosworth & Associates, LLC
4530 Park Road, Suite 100
Charlotte, NC 28209
704-376-5400

Valbridge Property Advisors | Paramount Appraisal Group, Inc.
412 E. Chatham Street
Cary, NC 27511
919-859-2666

OHIO

Valbridge Property Advisors | Allgeier Company
9277 Centre Point Dr., Suite 350
West Chester, OH 45069
513-785-0820

Valbridge Property Advisors
1655 W. Market Street, Suite 130
Akron, OH 44313
330-899-9900

526 E. Superior Avenue, Suite 455
Cleveland, OH 44114
216-367-9690

OKLAHOMA

Valbridge Property Advisors | Walton Property Services, LLC
6666 South Sheridan Road, Suite 104
Tulsa, OK 74133
918-712-9992

PENNSYLVANIA

Valbridge Property Advisors | Barone, Murtha, Shonberg & Associates, Inc.
4701 Baptist Road, Suite 304
Pittsburgh, PA 15227
412-881-6080

Valbridge Property Advisors | Lukens & Wolf, LLC
150 S. Warner Road, Suite 440
King of Prussia, PA 19406
215-545-1900

SOUTH CAROLINA

Valbridge Property Advisors | Atlantic Appraisals, LLC
800 Main Street, Suite 220
Hilton Head Island, SC 29926
843-342-2302

1250 Fairmont Avenue
Mt. Pleasant, SC 29464
843-884-1266

Valbridge Property Advisors | Robinson Company
610 N. Main Street
Greenville, SC 29601
864-233-6277

TENNESSEE

Valbridge Property Advisors | R.K. Barnes & Associates, Inc.
112 Westwood Place, Suite 300
Brentwood, TN 37027
615-369-0670

Valbridge Property Advisors | C & I Appraisal Services, Inc.
6750 Poplar Avenue, Suite 706
Memphis, TN 38138
901-753-6977

Valbridge Property Advisors | Meridian Realty Advisors, LLC
701 Broad Street, Suite 209
Chattanooga, TN 37402
423-285-8435

213 Fox Road
Knoxville, TN 37922
865-522-2424

TEXAS

Valbridge Property Advisors | Dugger, Canaday, Grafe, Inc.
111 Soledad, Suite 800
San Antonio, TX 78205
210-227-6229

Valbridge Property Advisors | The Gerald A. Teel Company, Inc.
Two Energy Square
4849 Greenville Avenue, Suite 1495
Dallas, TX 75206
214-446-1611

974 Campbell Road, Suite 204
Houston, TX 77024
713-467-5858

Valbridge Property Advisors
2731 81st Street
Lubbock, TX 79423
806-744-1188

UTAH

Valbridge Property Advisors | Free and Associates, Inc.
260 South 2500 West, Suite 301
Pleasant Grove, UT 84062
801-492-9328

1100 East 6600 South, Suite 201
Salt Lake City, UT 84121
801-262-3388

20 North Main, Suite 304
St. George, UT 84770
435-773-6300

VIRGINIA

Valbridge Property Advisors | Axial Advisory Group, LLC
656 Independence Parkway, Suite 220
Chesapeake, VA 23320
757-410-1222

7400 Beaufont Springs Drive, Suite 300
Richmond, VA 23225
804-672-4473

5107 Center Street, Unit 2B
Williamsburg, VA 23188
757-345-0010

WASHINGTON

Valbridge Property Advisors | Allen Brackett Shedd
18728 Bothell Way, NE, Suite B
Bothell, WA 98011
425-450-4040

2927 Colby Avenue, Suite 100
Everett, WA 98201
425-258-2611

419 Berkeley Avenue, Suite A
Fircrest, WA 98466
253-274-0099

506 Second Avenue, Suite 1001
Seattle, WA 98104
206-209-3016

Valbridge Property Advisors | Auble, Jolicoeur & Gentry, Inc.
7601 West Clearwater Ave., Suite 320
Kennewick, WA 99336
509-221-1540

324 N. Mullan Road
Spokane Valley, WA 99206
509-747-0999

WISCONSIN

Valbridge Property Advisors | Vitale Realty Advisors, LLC
12660 W. North Avenue
Brookfield, WI 53005
262-782-7990

CORPORATE OFFICE
2240 Venetian Court
Naples, FL 34109
239-325-8234 phone
239-325-8356 fax
valbridge.com

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IDAHO STATE UNIVERSITY

SUBJECT

Establishment of an online program fee for the Community Paramedic academic certificate program

REFERENCE

April 2016	The Idaho State Board of Education (Board) approved institutions' student tuition and fees for FY2017

APPLICABLE STATUTE, RULE, OR POLICY

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

BACKGROUND/DISCUSSION

Subsequent to the approval of student tuition and fees by the Board in April 2016, Idaho State University (ISU) has determined that an online program fee (in lieu of tuition and all other Board-approved fees) would be appropriate for the Community Paramedic academic certificate program. The program is fully online, with all courses offered and delivered via distance learning modalities. This is the first request for an on-line program fee by ISU.

IMPACT

The proposed online program fee for this program is $3,300. Currently, with no online program fee in place, a student in this program would pay $3,547 for the courses leading to the certificate.

ATTACHMENTS

Attachment 1 – Community Paramedic Online Program Fee Proposal	Page 3
Attachment 2 – Community Paramedic Budget 7-8-2016	Page 5

STAFF COMMENTS AND RECOMMENDATIONS

The proposed online program fee for the Community Paramedic certificate program meets the criteria specified in Board Policy V.R., lowers the cost of the program to students, and enhances the affordability and marketability of the program. Staff recommends approval.

BOARD ACTION

I move to approve the request by Idaho State University to establish a $3,300.00 online program fee for the Community Paramedic certificate program.

Moved by __________ Seconded by __________ Carried Yes _____ No _____

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ATTACHMENT 1

The Emergency Services Department (ESD) is proposing an online program fee for the Community Paramedic Academic Certificate Program of $3,300.00 per student.

The Community Paramedic Academic Certificate Program consists of nine academic credits made up of four classes and the clinical practicum offered over three semesters. All classes are taught online by paramedics and healthcare experts who have training and field experience in/with community paramedicine.

Budget Narrative – Community Paramedic Academic Certificate

Salaries and Wages-

- Mike Mikitish, Program Director/Dept Chair, will devote 2% per year, towards the program. His primary responsibility is overall project management including contract development.
- Ellen Jones, Course Coordinator, will devote 2% per year towards the program. Her responsibilities include student first point of contact post acceptance to program, program marketing and advising.
- Suzanne Shemwell, Administrative Assistant, will devote 2% per year towards the program. Her main focus is class scheduling and liaison to the registrar's office, course material sourcing.
- Karen Carson, Financial Technician, will devote 2% per year towards the program. Her primary responsibility is reconciling actual expenses to the budget, first point of contact for contractor compensation and payments, tracking discrepancies and problem resolution, as well as, contract compliance and development support.

Fringe –

- In years 2-5 of the budget presentation, a 3% incremental increase was included each year to salary expenses. Fringe benefits were applied at a standard rate of 20.96% for professional staff (Mike and Ellen) and 21.27% on staff salaries for all 5 years of the budget presentation. Medical insurance was included in year 1 at an annual rate of $12,240.00. Years 2-5 include a 9% incremental increase year over year.

Course Development –

- Salaries and benefits also include an estimate of $1,200.00 per year for use in paying instructors for course materials development. Course development includes curriculum updates, tests, newly identified resource materials, class presentations and cds amended, created or revised to current standards.

Travel –

- A travel allowance has been budgeted to cover Program Director and/or staff expenses related to attendance of course/topic specific conferences/seminars, such as the International Roundtable on Community Paramedicine. Additionally, a factor for periodic travel to main campus as may be required for meetings or discussion is included. The request is lower in the first year of the budget @$750.00/year with an increase to $1000.00/annually in years 2-5, aligned with expected program growth.

Other Direct Costs –

- Professional Services - $50/student for FISDAP registration. FISDAP is an online scheduling tool for use in the clinical phase of the program.

ATTACHMENT 1

- Contractual Services – budgeted payments to Ada County Paramedics for program instruction is calculated using an agreed upon sliding scale based on the total number of students participating in the program per semester. The contract includes expenses for the compensation of the Paramedic Director, Paramedic Instructor and Paramedic Agency Coordinator. Each consultant's roles, responsibilities, deliverables and compensation are based on the signed addendum agreement #11425-1-16.

Materials and Supplies –

- An average of $500/year is requested for needed material and supplies to support the program.

Capital –

- $1,800.00 for the first year and $3,500 in years 2-5 will be needed to for technology upgrades and/or repair.

Honoraria –

- An average of $2,150/annually is included for 3 subject matter expert guest speakers.

Other –

- Communications/Postage - A total of $500/year is requested for phone, postage, fax, etc. costs. Because this is a live-online program, many of the students are out of our local area resulting in small increases to long distance phone charges, increased fax use, etc.
- Specific costs associated with each student include:
  - $45.00 background check required for acceptance into clinical sites.
  - $20.00 malpractice insurance also applicable to clinical training.

Community Paramedic Track (SHIP Grant) - 15% OH Rate

IDAHO STATE UNIVERSITY — **Resource Allocation and Impact Summary**

BUDGET SUMMARY

to add a BS in Emergency Management (on-line)

			2017	2018	2019	2020	2021
PROPOSAL - ENROLLMENT PROJECTIONS							
Students							
Headcount			10	18	18	18	18
PROPOSAL - REVENUE							
Online Program Fee (per student)			3,300	3,300	3,300	3,300	3,300
Total Program Fee			33,000	59,400	59,400	59,400	59,400
Other — 15% Overhead			-4,950	-8,910	-8,910	-8,910	-8,910
GRAND TOTAL PROPOSED REVENUES			28,050	50,490	50,490	50,490	50,490
PROPOSAL - EXPENDITURES	FTE	Salary					
FTE Personnel and Costs	0.08	148,775	5,719	5,910	6,111	6,324	6,549
Operating Expenditures			21,650	35,310	35,310	35,310	35,310
Capital Costs			1,800	3,500	3,500	3,500	3,500
Library Support			0	0	0	0	0
Physical Facilities			0	0	0	0	0
Information Technology			0	0	0	0	0
GRAND TOTAL PROPOSED EXPENDITURES			29,169	44,720	44,921	45,134	45,359
PROPOSAL REVENUE LESS EXPENDITURES			**-1,119**	**5,770**	**5,569**	**5,356**	**5,131**

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EASTERN IDAHO TECHNICAL COLLEGE

SUBJECT

Request to provide right of way and permanent easement to City of Idaho Falls

REFERENCE

February 2012	Board approved public right of way and permanent easement with the City of Idaho Falls

APPLICABLE STATUTE, RULE, OR POLICY

Idaho State Board of Education Governing Policies & Procedures, Section V.I.5.b.

BACKGROUND/DISCUSSION

Eastern Idaho Technical College (EITC) is located at the eastern edge of Idaho Falls and is bounded on the southeast corner by the intersection of Hitt Road on the east and South 17th Street on the south. This area and the City of Ammon to the east of Idaho Falls have seen major growth since the intersection was last modified. During peak hours, traffic backs up on Hitt Road beyond the southern entrance to the campus, blocking vehicle access to the campus. To ease traffic congestion the City of Idaho Falls (City) proposes to install a right turn lane from Hitt Road onto 17th Street and sufficient additional roadway on 17th Street to allow traffic turning right to merge safely with westbound traffic on 17th Street. This project includes conveyance of property owned by EITC, thus requiring State Board of Education (Board) approval. Details and supporting documentation for the project are provided in the attachments.

IMPACT

The subject property on the southern end of EITC campus is not currently used by the College and there are no future plans for its development. Current and future impact of the property transfer is negligible. The City's proposed road improvement project will ease congestion, promote safety, and improve access to the EITC campus during peak use hours.

ATTACHMENTS

STAFF COMMENTS AND RECOMMENDATIONS

This proposal was presented to and approved by the Board in February 2012 (minutes reflecting the Board's earlier decision are provided at Attachment 5). The project was subsequently shelved when the City of Idaho Falls diverted funding for the project to other higher priority actions. The request is being re-submitted to the Board for approval because it has been well over one year since the original property transfer was authorized. Staff recommends approval.

BOARD ACTION

I move to approve the request by Eastern Idaho Technical College to grant the City of Idaho Falls 0.226 acres of permanent easement and 0.186 acres of right of way corresponding with the documents submitted to the Board as Attachments 1 through 4, and to authorize the College's President to execute all necessary related documents.

Moved by __________ Seconded by __________ Carried Yes _____ No _____

RIGHT-OF-WAY AGREEMENT

AGREEMENT, made this_______day of___________, 2016, by and between the City of Idaho Falls, a municipal corporation, whose address is P.O. Box 50220, Idaho Falls, Idaho 83405, hereinafter referred to as "City", and the State of Idaho, acting by and through the Eastern Idaho Technical College, whose address is 1600 South 25th East, Idaho Falls, Idaho 83404, hereinafter referred to as "EITC."

WITNESSETH:

WHEREAS, the City needs to acquire certain property adjacent to the rights-of-way of 17th Street and S 25th E, at the intersection of said streets, for the purpose of widening such rights-of-way and streets, and making modifications to the signalization and traffic control equipment located at such intersection;

WHEREAS, EITC is willing to donate and convey such right-of-way to the City for such purposes, subject to the terms and conditions set forth herein;

NOW, THEREFORE, it is hereby agreed as follows:

1. Conveyance of Property. EITC agrees to grant and convey to the City that certain real property, more particularly described in the Right-of-way Plat (Exhibit A) as Parcel 2A attached hereto and by this reference made a part hereof. Such conveyance shall be by Grant Deed. EITC further agrees to grant and convey to City a perpetual easement for the purpose of constructing, operating and maintaining a public road right-of-way, pedestrian walkway and public utilities therein, all as more particularly described in the Right-of-way Plat (Exhibit A) as Parcel 2E attached hereto and by this reference made a part hereof. Such easement shall be in substantially the same form as the Easement Deed.

2. Consideration. Conveyance of the property and easement described respectfully in the Right-of-way Plat attached hereto, shall be made without monetary consideration and the sole consideration for such conveyances shall be the City's obligations to make the landscaping and property renovation as described below.

3. Tree Removal and Location. City agrees to trim that certain willow tree located north of the easement parallel to 17th Street, all as shown in Exhibit "B" attached hereto. The City further agrees to relocate the four (4) conifers located in Easement 2E to a new location between S 25th East and EITC's south parking lot at the location more particularly shown on Exhibit "B" attached hereto. In the event that such Conifers are too large to be conveniently moved or cannot be removed without jeopardizing the health of such trees, the City agrees to purchase and replace such trees with other trees of similar caliper, height, character and/or species as may be solely determined by EITC. In the event of such relocation, City agrees it will replace, at its own cost and expense, any trees that die or show signs of dying within one (1) year after the date of such relocation. Such

replacement will also be with trees of similar species, caliper, height and character as may be determined at the sole discretion of EITC.

4. Relocation of Sign. City agrees to forthwith relocate and move the EITC sign as shown on Exhibit "B" and to relocate the same to a new location as shown on Exhibit "B".

5. Delivery of Deeds. EITC agrees to execute and deliver the Grant Deed reflected in the Right-of-way plat attached hereto within thirty (30) days of notification of the recording of the Right-of-way plat.

6. Repair of Sprinkler System. City agrees to repair any and all damage to EITC's sprinkler system caused by the City or necessitated in conjunction with the widening of 17th Street and S 25th East rights-of-way and to otherwise ensure that EITC's sprinkler system is promptly restored to a good, sound working condition.

7. Notices. Service of any notice permitted or required under the terms of this Agreement shall be deemed complete upon the deposit of the same in the United States Mail, by Certified or Registered Mail, addressed to EITC at 1600 South East 25th Street, Idaho Falls, Idaho, 83404; or addressed to the City at P.O. Box 50220, Idaho Falls, Idaho 83402, as the case may be, or such other address as either shall hereafter in writing to the other designate, or by causing said notice to be served personally upon EITC or on the City as the case may be. For the purposes hereof, personal service shall be complete when served in the manner provided for service of process under the Idaho Rules of Civil Procedure.

8. Costs. All costs associated with the construction of the sidewalk, curb, pavement, traffic signs and related facilities located within the deeded right-of-way and easement shall be borne exclusively by the City.

9. Complete Agreement. This writing evidences the complete and final agreement of the parties and no prior statement, representation or understanding shall be binding except as expressly set forth herein.

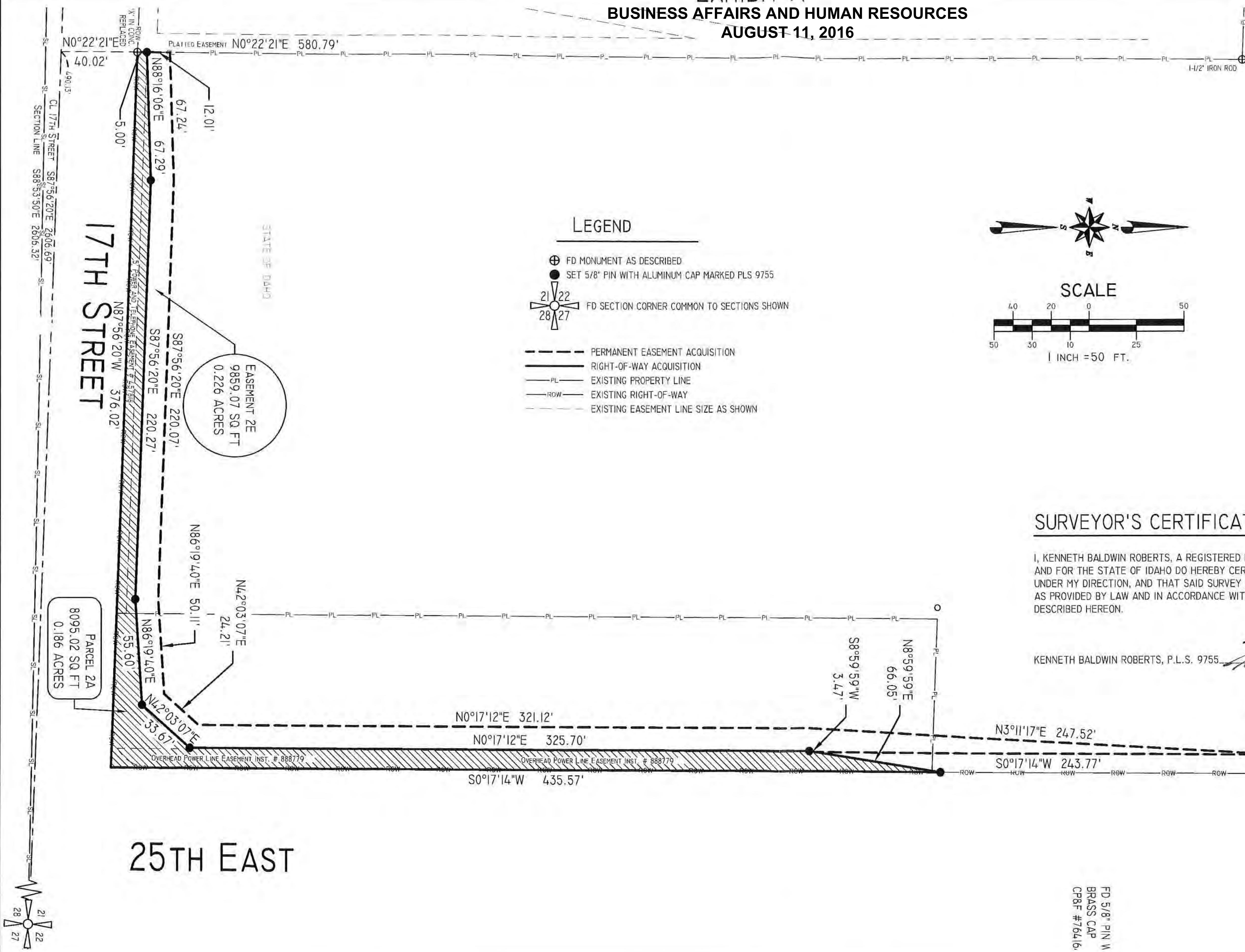
10. Binding Effect. This Agreement shall be binding upon the heirs, successors and assigns of the parties hereto.

CITY OF IDAHO FALLS	EASTERN IDAHO TECHNICAL COLLEGE
By: ______________________	By: ______________________
Rebecca L. Noah Casper	Rick Aman
Mayor	President

G:\WPDATA\DWS\2300 City of Idaho Falls\Public Works\Agreements\2012 Agreements\EITC ROW Agreement\EITC.AGR.v2.wpd:sm

ATTACHMENT 2

PARCEL 2A & 2E STATE OF IDAHO ACQUISITION



LEGEND

- FD MONUMENT AS DESCRIBED
- SET 5/8" PIN WITH ALUMINUM CAP MARKED PLS 9755
- 21 22 / 28 27 FD SECTION CORNER COMMON TO SECTIONS SHOWN
- PERMANENT EASEMENT ACQUISITION
- RIGHT-OF-WAY ACQUISITION
- PL EXISTING PROPERTY LINE
- ROW EXISTING RIGHT-OF-WAY
- EXISTING EASEMENT LINE SIZE AS SHOWN

SCALE
1 INCH = 50 FT.

SURVEYOR'S CERTIFICATE

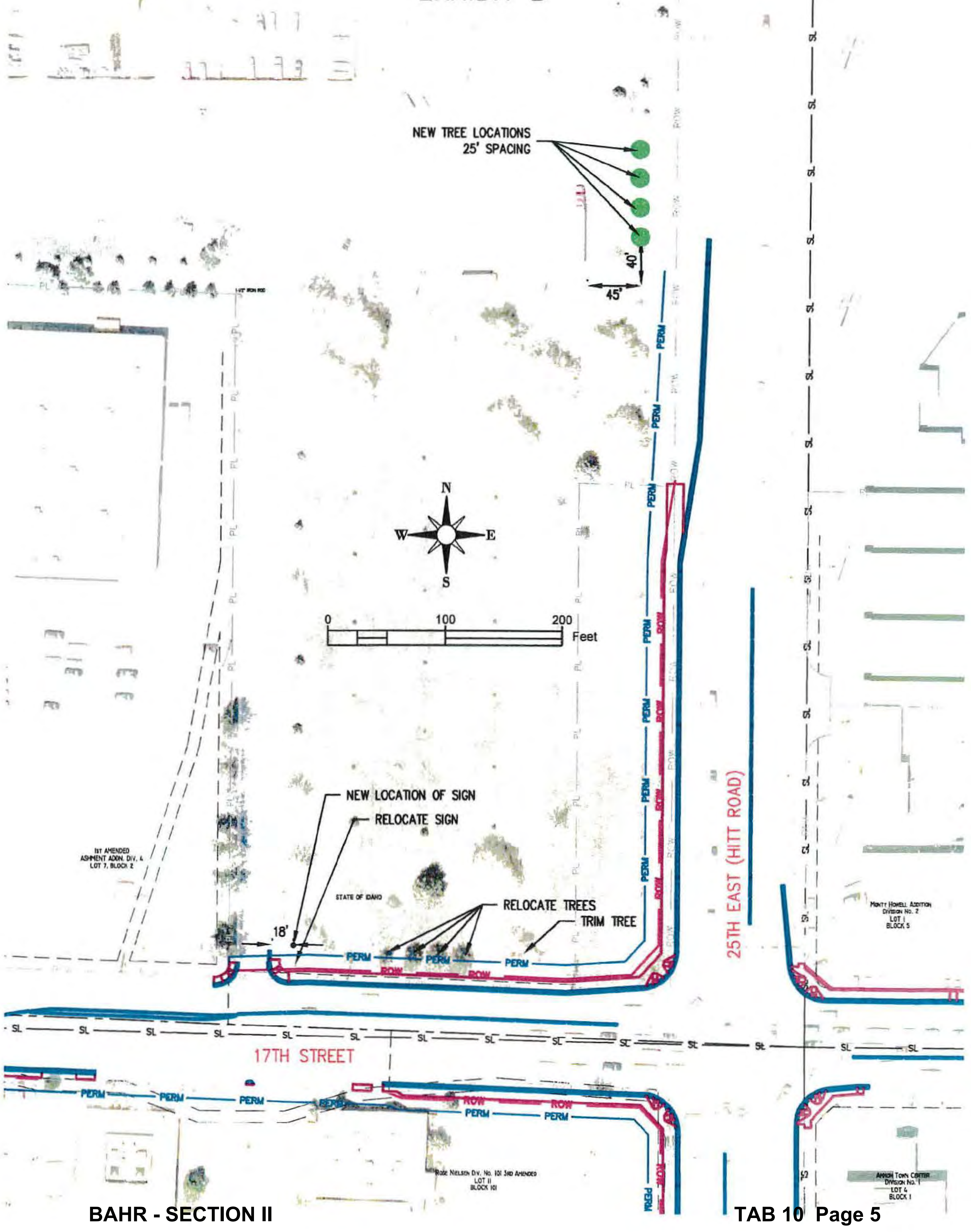
I, KENNETH BALDWIN ROBERTS, A REGISTERED PROFESSIONAL LAND SURVEYOR IN AND FOR THE STATE OF IDAHO DO HEREBY CERTIFY THAT THIS SURVEY WAS MADE UNDER MY DIRECTION, AND THAT SAID SURVEY IS TRULY AND CORRECTLY STAKED AS PROVIDED BY LAW AND IN ACCORDANCE WITH THE ACCOMPANYING PLAT AS DESCRIBED HEREON.

KENNETH BALDWIN ROBERTS, P.L.S. 9755

PROFESSIONAL LAND SURVEYOR REGISTERED 9755 6/2/16 STATE OF IDAHO KENNETH BALDWIN ROBERTS

CITY OF IDAHO FALLS ENGINEERING DEPARTMENT		
PARCEL 2A LANDS DESCRIBED IN DEEDS # SE¼ SEC 21 T. 2 N., R. 38 E., B.M.		
SCALE: 1"=50'	PROG. NO.	DATE:
	COMPUTER	SHEET NO.
DWG:		1 OF 1
PLOT DATE:		

EXHIBIT B


NEW TREE LOCATIONS
25' SPACING
40'
45'
N
W
E
S
0
100
200
Feet
NEW LOCATION OF SIGN
RELOCATE SIGN
RELOCATE TREES
TRIM TREE
18'
STATE OF IDAHO
1ST AMENDED
ASHMENT ADDN. DIV. 4
LOT 7, BLOCK 2
25TH EAST (HITT ROAD)
17TH STREET
MONTY HOWELL ADDITION
DIVISION No. 2
LOT 1
BLOCK 5
ROSE NIELSEN DIV. No. 101 3RD AMENDED
LOT 11
BLOCK 101
PERM
ROW
SL
PL

GRANT DEED

THIS INDENTURE is made this ______ day of ________________, 2016, between the State of Idaho, acting by and through the Eastern Idaho Technical College, whose address is 1600 South 25th East, Idaho Falls, Idaho 83404, hereinafter referred to as " GRANTOR", and the City of Idaho Falls, a municipal corporation of the State of Idaho, whose address is P.O. Box 50220, Idaho Falls, Idaho 83405, hereinafter referred to as "GRANTEE".

WITNESSETH, that the GRANTOR, for and in consideration of the sum of Ten Dollars ($10.00) lawful money of the United States of America, and other good and valuable consideration, to the GRANTOR in hand paid by the GRANTEE, the receipt whereof is hereby acknowledged, has granted, and by these presents does grant and confirm unto the GRANTEE, and to GRANTEE's heirs and assigns forever, all of the following described property in the County of Bonneville, State of Idaho, to-wit:

SEE PARCEL 2A ON RIGHT-OF-WAY PLAT INSTRUMENT NO. ____________________

TOGETHER with the tenements, hereditaments and appurtenances thereunto belonging or in anywise appertaining, and any reversions, any remainders, and rents, issues and profits therefrom; and all estate, right, title and interest in and to said property, as well in law as in equity, of the GRANTOR.

TO HAVE AND TO HOLD, the premises and the appurtenances unto the GRANTEE, and to GRANTEE's heirs and assigns forever.

In construing this deed and where the context so requires, the singular includes the plural.

IN WITNESS WHEREOF, the GRANTOR has executed the within instrument the day and year first above written.

EASTERN IDAHO TECHNICAL COLLEGE

By: ___________________________________

Rick Aman

President

STATE OF IDAHO)

) ss.

County of Bonneville)

On this _______ day of __________________, 2016, before me, the undersigned Notary Public in and for said state, personally appeared Rick Aman, known or identified to me to be the person whose name is subscribed to the within instrument as President of Eastern Idaho Technical College, and acknowledged to me he executed the same as such President of Eastern Idaho Technical College.

IN WITNESS WHEREOF, I have hereunto set my hand and affixed my official seal the day and year in this certificate first above written.

____

NOTARY PUBLIC

Residing at ___________________________

My commission expires _______________

(Seal)

DEED OF EASEMENT

THIS INDENTURE, made this _____day of ______________, 2016, between the State of Idaho, acting by and through the Eastern Idaho Technical College whose address is 1600 South 25th East, Idaho Falls, Idaho, 83404, hereinafter referred to as "GRANTOR", and the CITY OF IDAHO FALLS, a municipal corporation, P.O. Box 50220, Idaho Falls, Idaho 83405, County of Bonneville, hereinafter referred to as "GRANTEE".

WITNESSETH

For and in consideration of the sum of One and No/100 Dollars ($1.00) and other good and valuable consideration paid by GRANTEE, the receipt of which is hereby acknowledged, GRANTOR hereby grants, bargains and conveys unto GRANTEE, and its successors and assigns forever, an irrevocable permanent public utility easement over, across and under the following described real estate, situated in the County of Bonneville, State of Idaho, to-wit:

See Parcel 2E on Right-of-way Plat Instrument No. ________________________

This easement may be used for the construction, maintenance, and repair of any public utility lines, equipment and appurtenant improvements placed on the premises hereunder, and GRANTEE shall have the right, at GRANTORS' expense, to remove, cut, trim any trees, brush, ornamental shrubbery or plants, or other obstructions on said premises which may injure or interfere with the use thereof by the GRANTEE for such purposes. Such right may be exercised without prior notice to GRANTOR or its heirs, successors or assigns.

GRANTOR further agrees they will construct no permanent structures upon the premises described, including but not limited to buildings constructed on permanent foundations, light posts, sign posts or other structures which are not readily movable with nominal expense.

To have and to hold unto GRANTEE and its successors and assigns forever.

GRANTOR and GRANTORS' heirs shall warrant and defend the premises in the quiet and peaceful possession of GRANTEE and GRANTEE'S successors and assigns, against the GRANTOR and GRANTORS' heirs, and against every person whomsoever who lawfully holds or claims to hold rights in the premises as of the date hereof.

IN WITNESS WHEREOF, GRANTOR has hereunto subscribed their hand and seal on this day and year first above written.

____
RICK AMAN – PRESIDENT EITC

STATE OF IDAHO)
) ss:
County of ____________)

On this ___________day of ___________________, 2016, before me, the undersigned, a notary public, in and for said State, personally appeared RICK AMAN, known or identified to me to be the President of Eastern Idaho Technical College, and whose name is subscribed to the within instrument and acknowledged to me that he is authorized to execute the same for and on behalf of said Eastern Idaho Technical College.

IN WITNESS WHEREOF, I have hereunto set my hand and affixed my official seal, the day and year in this certificate first above written.

____
Notary Public of Idaho
Residing at: ______________________
My Commission Expires: _____________

(Seal)

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

APPROVED MINUTES
STATE BOARD OF EDUCATION
February 15-16, 2012
Boise State University
Student Union Building
Boise, Idaho

A regularly scheduled meeting of the State Board of Education was held February 15-16, 2012 at Boise State University in Boise, Idaho.

Present:

Richard Westerberg, President	Milford Terrell
Don Soltman, Secretary	Bill Goesling
Ken Edmunds, Vice President	Emma Atchley
Rod Lewis	Tom Luna, State Superintendent

Wednesday, February 15, 2012

The Board met in the Simplot Ballroom of the Student Union Building at Boise State University in Boise, Idaho. Board President Richard Westerberg called the meeting to order at 1:00 pm.

BOARDWORK

1. Agenda Review

BOARD ACTION

M/S (Edmunds/Goesling): By unanimous consent the Board agreed to approve the agenda as amended. There were no objections.

President Westerberg requested unanimous consent to amend the order of the agenda and set the Department of Education section to a time certain of 10:15 a.m. to accommodate Superintendent Luna's travel schedule. President Westerberg reminded those present that the Boise State University bond item, BAHR Tab 6, was already set to a time certain at 2:00 p.m. Thursday. There were no objections.

2. Minutes Review

BOARD ACTION

STATE BOARD OF EDUCATION
650 W. State Street • P. O. Box 83720 • Boise, ID 83720-0037
208/334-2270 • FAX: 208/334-2632
http://www.boardofed.idaho.gov/

Mr. Terrell introduced the item while Mr. Freeman provided a handout to the Board. Mr. Terrell turned the time over to Chet Herbst from LCSC for a summary. Mr. Herbst summarized that Lewis-Clark State College has identified an opportunity to take advantage of historically low interest rates by refinancing the balance of its current revenue bonds. The college stands to reduce both the debt principal and interest through this refinancing.

9. Eastern Idaho Technical College – City of Idaho Falls, Public Right-of-Way and Easement

BOARD ACTION

M/S (Terrell/Soltman): To approve the request by Eastern Idaho Technical College to grant the City of Idaho Falls a public right of way of 0.25 acres and permanent easement of 0.18 acres in substantial conformance with the documents submitted to the Board as Attachments 1 and 2, to authorize the College's Vice President for Finance and Administration to execute all necessary related documents, subject to prior review by Board counsel. The motion passed unanimously. Board members Luna and Atchley were absent from voting.

Mr. Terrell introduced the item and commented this is a request by EITC for the approval of a right of way and permanent easement to the City of Idaho Falls. This is a friendly and mutually beneficial agreement to help ease traffic congestion on a major arterial roadway fronting the campus. Staff recommends approval.

INSTRUCTION, RESEARCH, AND STUDENT AFFAIRS

College and Institutions Mission Statements

The work session discussion for this item occurred on Wednesday, February 15, 2012. Board member Edmunds confirmed that the Board members had all received and reviewed the revisions to the Mission Statements before considering the motions before them today.

BOARD ACTION

M/S (Edmunds/Soltman): To approve Boise State University's Mission Statement and Core Themes as amended. The motion passed unanimously. Board members Luna and Atchley were absent from voting.

There was no discussion.

M/S (Edmunds/Soltman): To approve Idaho State University's Mission Statement and Core Themes as amended. The motion passed unanimously. Board members Luna and Atchley were absent from voting.

There was no discussion.

M/S (Edmunds/Soltman): To approve the University of Idaho's Mission Statement and Core Themes as amended. The motion passed unanimously. Board members Luna and Atchley were absent from voting.

TAB	DESCRIPTION	ACTION
1	**SUPERINTENDENT'S UPDATE**	Information Item
2	**PROPOSED RULE 08.02.03.004.01, RULES GOVERNING THOROUGHNESS, INCORPORATION BY REFERENCE – IDAHO CONTENT STANDARDS**	Motion to Approve
3	**TEMPORARY AND PROPOSED RULE 08.02.03.106, .117, RULES GOVERNING THOROUGHNESS – ADVANCED OPPORTUNITIES**	Motion to Approve

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SUBJECT

Superintendent of Public Instruction Update to the State Board of Education

BACKGROUND/DISCUSSION

Superintendent of Public Instruction, Sherri Ybarra, 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

Proposed Rule – IDAPA 08.02.03.004.01, Rules Governing Thoroughness, Incorporation by Reference – Idaho Content Standards

REFERENCE

April 2009	Board approved updated Idaho Content Standards.
April 2010	Board approved revision and renaming of Information and Communication Technology standards.
August 2010	Board approved revision of Mathematics standards and revision of English Language Arts standards.
August 2015	Board approved updated Idaho Content Standards for Humanities and Science (rejected by legislature).

APPLICABLE STATUTE, RULE, OR POLICY

Idaho State Board of Education Governing Policies & Procedures, Section IV.C.
Section 33-1612, Idaho Code
IDAPA 08.02.03.004.01, Rules Governing Thoroughness – The Idaho Content Standards

BACKGROUND/DISCUSSION

The Idaho Content Standards reflect statements of what students should know and do in various content disciplines and grades. Content standards are adopted statewide and reviewed every six (6) years by teams of educators and stakeholders. These standards provide a consistent foundational level of academic content needed to be successful at each grade level and to graduate from Idaho's public schools. During the 2016 review cycle the following standards were reviewed:

Health Education Content Standards

Revisions to the Health Content Standards are recommended based on public comment received. These revisions include: updating language to clarify goals and objectives, adding language to the Decision Making Standard for grades 6-8 and grades 9-12, clarifying the meaning of environmental exposure, and adding wording to the examples related to alcohol, tobacco, and other drugs and about the consequences of a criminal record.

Arts and Humanities Content Standards

Recommended changes to the Arts and Humanities Content Standards come from recommendations by the committees who reviewed the standards for each of the disciplines.

The fine arts standards include the traditional disciplines of dance, music, theatre, and visual arts. Media Arts, which reflects digital and multi-media art, is a new addition to the standards. Each of the fine arts standards requires deeper thinking about important themes in art and explores learning through creating, performing, reflecting, and connecting.

The humanities standards include the disciplines of World Language and Interdisciplinary Humanities. The new World Language standards are more complete and allow both teachers and students to measure progress through charts that outline proficiencies at the levels of basic, proficient, and advanced. The new Interdisciplinary Humanities standards offer more guidance on how to integrate multiple disciplines through essential understandings and essential questions.

English Language Arts/Literacy and Mathematics Content Standards

In 2010, the Idaho Board of Education adopted the current content standards for English language arts/literacy and mathematics. During the 2015 Idaho Legislative Session, House Bill 314 passed, mandating a review of the Idaho English Language Arts/Literacy and Mathematics standards. While stakeholders had an opportunity to provide feedback during the initial adoption process in 2010-2011, the 2015 review period provided parents, students, teachers, higher education, and the public at large the opportunity to review the standards based on their experience with implementation of the standards over the last several years. Only comments tied to a specific standard were considered during this review period.

The Idaho Challenge English Language Arts/Literacy Standards Committee recommended twenty-one (21) changes to the English Language Arts/Literacy Content Standards. These changes include recommending language clarification, additions to writing standards, and expanding upon existing standards.

The Idaho Challenge Math Standards Committee met on December 16 and 17, 2015 where nineteen (19) individuals reviewed submitted comments for mathematics. Approximately 110 substantive comments were received from community stakeholders for mathematics, the majority of which were focused on instruction and curriculum at the local level and not the state standards. The review team made two (2) recommendations based on the 110 substantive comments. The first recommendation was to communicate the existence of the reference section in the standards document, specifically table 3, through the addition of a footnote attached to a seventh grade standard, The Number System (7.RP.1.d). The second recommendation was to change high school standard The Real Number System's (N-RN.1) description by removing redundant language.

Physical Education Content Standards

During the fall of 2015, a committee of physical education educators and health professionals reviewed the Physical Education Content Standards. The committee recommended changes to the Physical Education standards to include: defining physical literacy, updating language, and clarifying goals and objectives to align with current physical education skills and health related fitness activities.

Social Studies Content Standards

The Social Studies content standards revisions are based on recommendations from a committee of twelve (12) teachers from different grade levels and areas of expertise from across the state, brought together to participate in the revision process over four (4) days. The committee recommendations to the social studies standards include: additional language to increase clarification, strengthening American Indian content objectives, and increasing knowledge of the basic principles of the United States Constitution.

Computer Science Content Standards

The Computer Science Content Standards are entirely new and build upon the 2016 draft standards put out by the Computer Science Teachers Association (CTSA). The CTSA draft standards were created by several states, including Idaho, large school districts, technology companies, organizations, and individuals, to align with the K-12 Computer Science Education Framework. Idaho's computer science standards working group evaluated and adapted the draft CSTA standards knowing they are the most up to date and the best match for Idaho. The standards outline what it means to be literate in computer science at various grade levels.

IMPACT

Districts may experience some fiscal impact in the form of new curriculum to align with revised content standards. The cost would likely be cyclical.

ATTACHMENTS

STAFF COMMENTS AND RECOMMENDATIONS

Pursuant to IDAPA 08.02.03.004.01 a portion of the Idaho Content Standards are reviewed each year in alignment with the curricular materials adoption schedule. Curricular materials are required to be reviewed every six (6) years. These materials are reviewed based on a six (6) year rolling calendar so that a portion of them are reviewed each year. The content standards are brought to the Board for consideration the year prior to the curricular materials review to allow the curricular materials review to include any changes to the content standards that are adopted by the Board. The six-year rolling calendar is based on the year of adoption by the Board. Due to the timelines for amendments to administrative code, the Board adopts the standards during the summer of a given year and the changes adopted by the Board take effect in the following spring after consideration by the legislature. Based on this timeline, the English Language Arts/Literacy and Mathematics Content Standards were scheduled to come to the Board during this review cycle and the Arts and Humanities Content Standards were scheduled to come to the Board during the 2015 review cycle. The Board approved amendments to the Arts and Humanities and Science Content Standards during the 2015 review cycle, these standards were rejected by the legislature over concern that there had not been given enough opportunity for public input on the standards. When a rule is rejected by the legislature the proposed amendments do not go into effect and any temporary rules revert back to previous codified version. Due to the rejection by the 2016 legislature, the Arts and Humanities standards are coming back to the Board again for consideration this year and the Science standards will come back to the Board for consideration at a later date.

Proposed rules have a 21 day comment period prior to returning to the Board for consideration as a pending rule. Based on received comments and Board direction, changes may be made to proposed rules prior to entering the pending stage. All pending rules will be brought back to the Board for approval prior to submittal to the Department of Administration for publication in the Idaho Administrative Rules Bulletin. Pending rules are then forwarded to the legislature for consideration. Pending rules become effective at the end of the legislative session in which they are submitted unless rejected by the legislature.

BOARD ACTION

I move to approve the revisions to the Health, Arts and Humanities, English Language Arts/Literacy, Mathematics, Physical Education, and Social Studies Content Standards and the adoption of Computer Science Content Standards as submitted in attachments 2 through 14.

Moved by __________ Seconded by __________ Carried Yes _____ No _____

OR

I move to approve the revisions to the Health Content Standards as submitted in Attachment 2.

Moved by _______ Seconded by __________ Carried Yes _____ No _____

I move to approve the revisions to the Arts and Humanities Content Standards as submitted in Attachments 3 through 9.

Moved by _______ Seconded by __________ Carried Yes _____ No _____

I move to approve the revisions to the English Language Arts/Literacy Content Standards as submitted in Attachment 10.

Moved by _______ Seconded by __________ Carried Yes _____ No _____

I move to approve the revisions to the Mathematics Content Standards as submitted in Attachment 11.

Moved by _______ Seconded by __________ Carried Yes _____ No _____

I move to approve the revisions to the Physical Education Content Standards as submitted in Attachment 12.

Moved by _______ Seconded by __________ Carried Yes _____ No _____

I move to approve the revisions to the Social Studies Content Standards as submitted in Attachment 13.

Moved by _______ Seconded by __________ Carried Yes _____ No _____

I move to approve the adoption of the Computer Science Content Standards as submitted in Attachment 14.

Moved by _______ Seconded by __________ Carried Yes _____ No _____

AND

I move to approve the Proposed Rule amendment to IDAPA 08.02.03.004.01, Rules Governing Thoroughness, The Idaho Content Standards, as submitted in Attachment 1.

Moved by __________ Seconded by __________ Carried Yes _____ No _____

IDAPA 08
TITLE 02
CHAPTER 03

08.02.03 - RULES GOVERNING THOROUGHNESS

004. INCORPORATION BY REFERENCE.
The following documents are incorporated into this rule: (3-30-07)

01. The Idaho Content Standards. The Idaho Content Standards as adopted by the State Board of Education. Individual subject content standards are adopted in various years in relation to the curricular materials adoption schedule. Copies of the document can be found on the State Board of Education website at www.boardofed.idaho.gov. (3-29-10)

~~a.~~ c. Driver Education, as revised and adopted on August 21, 2008. (3-29-10)

~~b.~~ e. Health, as revised and adopted on ~~April 17, 2009~~ August 11, 2016. ~~(3-29-10)~~(____)

c. a. Arts and Humanities Categories: ~~(3-29-10)~~(____)

~~i.~~ vi. Visual Arts, as revised and adopted on ~~April 17, 2009~~August 11, 2016; ~~(3-29-10)~~(____)

~~ii.~~ i. Dance, as revised and adopted on ~~April 17, 2009~~August 11, 2016; ~~(3-29-10)~~(____)

~~iii.~~ v. ~~Drama~~ Theatre, as revised and adopted on ~~April 17, 2009~~August 11, 2016; ~~(3-29-10)~~(____)

~~iv.~~ ii. Interdisciplinary Humanities, as revised and adopted on ~~April 17, 2009~~August 11, 2016; ~~(3-29-10)~~(____)

~~v.~~ iv. Music, as revised and adopted on ~~April 17, 2009~~August 11, 2016; ~~(3-29-10)~~(____)

~~vi.~~ vii. World languages, as revised and adopted on ~~April 17, 2009.~~August 11, 2016; ~~(3-29-10)~~(____)

iii. Media Arts, as adopted on August 11, 2016. (____)

d. English Language Arts/Literacy, as revised and adopted on ~~August 11, 2010~~August 11, 2016. ~~(4-7-11)~~(____)

~~e.~~ g. Limited English Proficiency, as revised and adopted on August 21, 2008. (3-29-10)

~~f.~~ h. Mathematics, as revised and adopted on ~~August 11, 2010~~August 11, 2016. ~~(4-7-11)~~(____)

~~g.~~ i. Physical Education, as revised and adopted on ~~April 17, 2009~~August 11, 2016. ~~(3-29-10)~~(____)

~~h.~~ j. Science, as revised and adopted on April 17, 2009. (3-29-10)

~~i.~~ k. Social Studies, as revised and adopted on ~~April 17, 2009~~August 11, 2016. ~~(3-29-10)~~(____)

~~j.~~ f. Information and Communication Technology, as revised and adopted on April 22, 2010. (4-7-11)

b. Computer Science, adopted on August 11, 2016. (____)

(BREAK IN CONTINUITY OF SECTIONS)

008. DEFINITIONS H - S.

01. ~~**Interdisciplinary or**~~ **Integrated Assessment**. Assessment based on tasks that measures a student's ability to apply concepts, principles, and processes from two (2) or more subject disciplines to a project, issue, or problem. ~~(4-5-00)~~(____)

02. International Baccalaureate (IB) - Administered by the International Baccalaureate Organization, the IB program provides a comprehensive liberal arts course of study for students in their junior and senior years of high school. IB students take end-of-course exams that may qualify for college credit. Successful completion of the full course of study leads to an IB diploma. (4-11-06)

03. Interdisciplinary Study: An approach to leaning in two (2) or more disciplines that enables students to identify and apply authentic connections and integrate essential concepts that transcend individual disciplines. (____)

~~03~~04. Laboratory. A laboratory science course is defined as one in which at least one (1) class period each week is devoted to providing students with the opportunity to manipulate equipment, materials, specimens or develop skills in observation and analysis and discover, demonstrate, illustrate or test scientific principles or concepts. ~~(4-11-06)~~(____)

~~04~~05. Learning Plan. The plan that outlines a student's program of study, which should include a rigorous academic core and a related sequence of electives in academic, professional-technical education (PTE), or humanities aligned with the student's post graduation goals. ~~(4-11-06)~~(____) (4-11-06)

~~05~~06. Narrative. Text in any form (print, oral, or visual) that recounts events or tells a story. (4-5-00)

~~06~~07. Norm-Referenced Assessment. Comparing a student's performance or test result to performance of other similar groups of students; (e.g., he typed better than eighty percent (80%) of his classmates.) (4-5-00)

~~07~~08. On-Demand Assessment. Assessment that takes place at a predetermined time and place. Quizzes, state tests, SATs, and most final exams are examples of on-demand assessment. (4-5-00)

~~08~~09. Performance Assessment. Direct observation of student performance or student work and professional judgment of the quality of that performance. Good quality performance assessment has pre-established performance criteria. (4-5-00)

~~09~~10. Performance-Based Assessment. The measurement of educational achievement by tasks that are similar or identical to those that are required in the instructional environment, as in performance assessment tasks, exhibitions, or projects, or in work that is assembled over time into portfolio collections. (4-5-00)

~~10~~11. Performance Criteria. A description of the characteristics that will be judged for a task. Performance criteria may be holistic, analytic trait, general or specific. Performance criteria are expressed as a rubric or scoring guide. Anchor points or benchmark performances may be used to identify each level of competency in the rubric or scoring guide. (4-5-00)

~~11~~12. Phonics. Generally used to refer to the system of sound-letter relationships used in reading and writing. Phonics begins with the understanding that each letter (or grapheme) of the English alphabet stands for one (1) or more sounds (or phonemes). (4-5-00)

~~12~~13. Portfolio. A collection of materials that documents and demonstrates a student's academic and work-based learning. Although there is no standard format for a portfolio, it typically includes many forms of information that exhibit the student's knowledge, skills, and interests. By building a portfolio, students can recognize their own growth and learn to take increased responsibility for their education. Teachers, mentors, and employers can use portfolios for assessment purposes and to record educational outcomes. (4-5-00)

~~13~~14. **Professional Development**. A comprehensive, sustained, timely, and intensive process to improve effectiveness of teachers and administrators in raising student achievement, which: (4-4-13)

a. Aligns with rigorous state academic achievement standards, local educational agency goals, school improvement goals, effective technology integration, and Common Core standards. (4-4-13)

b. Utilizes data driven instruction using a thorough review and continual evaluation of data on teacher and student performance to define clear goals and distinct outcomes. (4-4-13)

c. Provides opportunities that are individualized enough to meet distinct and diverse levels of need for teachers and administrators. (4-4-13)

d. Is facilitated by well-prepared school administrators, coaches, mentors, master teachers, lead teachers, or third-party providers under contract with the State Department of Education, school district, or charter school, and supported by external research, expertise, or resources. (4-4-13)

e. Fosters a collective responsibility by educators within the school for improved student performance and develops a professional learning community. (4-4-13)

15. **Project Based Learning**. A hands-on approach to learning that encourages students to create/interpret/communicate an original work or project and assesses quality and success of learning through performance/presentation/production of that work or project. (____)

~~14~~16. **Print Awareness**. In emergent literacy, a learner's growing awareness of print as a system of meaning, distinct from speech and visual modes of representation. (4-5-00)

~~15~~17. **Professional-Technical Education**. Formal preparation for semi-skilled, skilled, technical, or paraprofessional occupations, usually below the baccalaureate level. (4-11-06)

~~16~~18. **Proficiency**. Having or demonstrating a high degree of knowledge or skill in a particular area. (4-5-00)

~~17~~19. **School-to-Work Transition**. A restructuring effort that provides multiple learning options and seamless integrated pathways to increase all students' opportunities to pursue their career and educational interests. (4-5-00)

~~18~~20. **Service Learning**. Combining service with learning activities to allow students to participate in experiences in the community that meet actual human needs. Service learning activities are integrated into the academic curriculum and provide structured time for a student to think, talk, or write about what was done or seen during the actual service activity. Service learning provides students with opportunities to use newly acquired skills and knowledge in real-life situations in their communities, and helps foster the development of a sense of caring for others. (4-5-00)

~~19~~21. **Skill Certificate**. Portable, industry-recognized credential that certifies the holder has demonstrated competency on a core set of performance standards related to an occupational cluster area. Serving as a signal of skill mastery at benchmark levels, skill certificates may assist students in finding work within their community, state, or elsewhere. A National Skills Standards Board is presently charged with issuing skill voluntary standards in selected occupations based on the result of research and development work completed by twenty-two (2) contractors. (4-5-00)

~~20~~22. **Standards**. Statements about what is valued in a given field, such as English language arts, and/or descriptions of what is considered quality work. See content standards, assessment standards, and achievement standards. (4-2-08)

~~21~~23. **Standardization**. A set of consistent procedures for constructing, administering and scoring an assessment. The goal of standardization is to ensure that all students are assessed under uniform conditions so the interpretation of performance is comparable and not influenced by differing conditions. Standardization is an important consideration if comparisons are to be made between scores of different individuals or groups. (4-5-00)

~~22~~24. **Standards-Based Education**. Schooling based on defined knowledge and skills that students must attain in different subjects, coupled with an assessment system that measures their progress. (4-5-00)

~~23~~25. **Structured Work Experience**. A competency-based educational experience that occurs at the worksite but is tied to the classroom by curriculum through the integration of school-based instruction with worksite experiences. Structured work experience involves written training agreements between school and the worksite, and individual learning plans that link the student's worksite learning with classroom course work. Student progress is supervised and evaluated collaboratively by school and worksite personnel. Structured work experience may be paid or unpaid; may occur in a public, private, or non-profit organization; and may or may not result in academic credit and/or outcome verification. It involves no obligation on the part of the worksite employer to offer regular employment to the student subsequent to the experience. (4-5-00)

~~24~~26. **Student Learning Goals (Outcomes)**. Statements describing the general areas in which students will learn and achieve. Student learning goals typically reflect what students are expected to know by the time they leave high school, such as to read and communicate effectively; think critically and solve problems; develop positive self-concept, respect for others and healthy patterns of behavior; work effectively in groups as well as individually; show appreciation for the arts and creativity; demonstrate civic, global and environmental responsibility; recognize and celebrate multicultural diversity; exhibit technological literacy; have a well developed knowledge base which enhances understanding and decision making, and demonstrate positive problem solving and thinking skills. (4-5-00)

~~25~~27. **Synchronous Course**. A course in which the teacher and students interact at the same time. May be applied to both traditional and technology based courses. (3-29-12)

(BREAK IN CONTINUITY OF SECTIONS.)

105. HIGH SCHOOL GRADUATION REQUIREMENTS.

A student must meet all of the requirements identified in this section before the student will be eligible to graduate from an Idaho high school. The local school district or LEA may establish graduation requirements beyond the state minimum. (5-8-09)

01. Credit Requirements. The State minimum graduation requirement for all Idaho public high schools is forty-six (46) credits and must include twenty-nine (29) credits in core subjects as identified in Paragraphs 105.01.c. through 105.01.i. (3-12-14)

a. Credits. (Effective for all students who enter the ninth grade in the fall of 2010 or later.) One (1) credit shall equal sixty (60) hours of total instruction. School districts or LEA's may request a waiver from this provision by submitting a letter to the State Department of Education for approval, signed by the superintendent and chair of the board of trustees of the district or LEA. The waiver request shall provide information and documentation that substantiates the school district or LEA's reason for not requiring sixty (60) hours of total instruction per credit. (3-29-10)

b. Mastery. A student may also achieve credits by demonstrating mastery of a subject's content standards as defined and approved by the local school district or LEA. (3-29-10)

c. Secondary Language Arts and Communication. Nine (9) credits are required. Eight (8) credits of instruction in Language Arts. Each year of Language Arts shall consist of language study, composition, and literature and be aligned to the Idaho Content Standards for the appropriate grade level. One (1) credit of instruction in communications consisting of oral communication and technological applications that includes a course in speech, a course in debate, or a sequence of instructional activities that meet the Idaho Speech Content Standards requirements. (3-29-10)

d. Mathematics. Six (6) credits are required. Secondary mathematics includes Applied Mathematics, Business Mathematics, Algebra, Geometry, Trigonometry, Fundamentals of Calculus, Probability and Statistics, Discrete Mathematics, and courses in mathematical problem solving and reasoning. AP Computer Science, Dual Credit Computer Science, and Dual Credit Engineering courses may also be counted as a mathematics credit if the student has completed Algebra II standards. Students who choose to take AP Computer Science, Dual Credit Computer Science, and Dual Credit Engineering may not concurrently count such courses as both a math and science credit. (3-12-14)

i. Students must complete secondary mathematics in the following areas: (3-12-14)

(1) Two (2) credits of Algebra I or courses that meet the Idaho Algebra I Content Standards as approved by the State Department of Education; (3-29-10)

(2) Two (2) credits of Geometry or courses that meet the Idaho Geometry Content Standards as approved by the State Department of Education; and (3-29-10)

(3) Two (2) credits of mathematics of the student's choice. (3-29-10)

ii. Two (2) credits of the required six (6) credits of mathematics must be taken in the last year of high school in which the student intends to graduate. For the purposes of this subsection, the last year of high school shall include the summer preceding the fall start of classes. Students who return to school during the summer or the following fall of the next year for less than a full schedule of courses due to failing to pass a course other than math are not required to retake a math course as long as they have earned six (6) credits of high school level mathematics. (3-12-14)

iii. Students who have completed six (6) credits of math prior to the fall of their last year of high school, including at least two (2) semesters of an Advanced Placement or dual credit calculus or higher level course, are exempt from taking math during their last year of high school. High School math credits completed in middle school shall count for the purposes of this section. (3-12-14)

e. Science. Six (6) credits are required, four (4) of which will be laboratory based. Secondary sciences include instruction in applied sciences, earth and space sciences, physical sciences, and life sciences. Up to two (2) credits in AP Computer Science, Dual Credit Computer Science, and Dual Credit Engineering may be used as science credits. Students who choose to take AP Computer Science, Dual Credit Computer Science, and Dual Credit Engineering may not concurrently count such courses as both a math and science credit. (3-12-14)

i. Secondary sciences include instruction in the following areas: biology, physical science or chemistry, and earth, space, environment, or approved applied science. Four (4) credits of these courses must be laboratory based. (3-29-10)

f. Social Studies. Five (5) credits are required, including government (two (2) credits), United States history (two (2) credits), and economics (one (1) credit). Courses such as geography, sociology, psychology, and world history may be offered as electives, but are not to be counted as a social studies requirement. (3-29-10)

g. Arts and Humanities. Two (2) credits are required. Arts and Humanities courses include instruction in visual arts, music, theatre, dance, media arts or world language aligned to the Idaho content standards for those subjects. ~~Other courses such as literature, history, philosophy, architecture, or comparative world religions~~ A course in Interdisciplinary Humanities may satisfy the ~~humanities standards~~ graduation requirements if the course is aligned to the Idaho Interdisciplinary Humanities Content Standards. ~~(3-29-10)~~(   )

h. Health/Wellness. One (1) credit is required. Course must be aligned to the Idaho Health Content Standards. Effective for all public school students who enter grade nine (9) in Fall 2015 or later, each student shall receive a minimum of one (1) class period on psychomotor cardiopulmonary resuscitation (CPR) training as outlined in the American Heart Association (AHA) Guidelines for CPR to include the proper utilization of an automatic external defibrillator (AED) as part of the Health/Wellness course. (3-12-14)

i. Students participating in one (1) season in any sport recognized by the Idaho High School Activities Association or club sport recognized by the local school district, or eighteen (18) weeks of a sport recognized by the local school district may choose to substitute participation up to one (1) credit of physical education. Students must show mastery of the content standards for Physical Education in a format provided by the school district. (4-1-15)

IDAHO CONTENT STANDARDS
HEALTH EDUCATION
~~**Kindergarten to Grade 2**~~

Kindergarten to Grade 2

Standard 1: Comprehend Core Concepts

Core Concepts of Health Education for K-Grade 2 are defined below:

Alcohol, Tobacco & Other Drugs

The use of alcohol, tobacco, and other drugs has major implications in the lifelong health of individuals. ~~Implications~~ Instruction includes the effects, influences, and prevention of the use of alcohol, tobacco products, and other types of drugs on the body and mind.

Nutrition & Physical Activity

To be ready to learn and to achieve their fullest potential, children need to be well nourished and physically active. In order to enhance physical, mental, emotional, and social ~~health~~ wellness, students ~~need to~~will acquire the knowledge and skills to make healthy food choices and engage in lifelong physical activity.

Injury Prevention & Safety

Unintentional and intentional injuries rank among the greatest threats to the health of children ~~and young adults. Knowledge about~~. Instruction includes prevention through safe living ~~habits~~ skills and choices, ~~healthy decisions,~~ violence prevention, and emergency response and preparedness. ~~an understanding~~ Understanding ~~of~~ the consequences of one's decisions will help to prevent ~~many~~ injuries.

Mental, Emotional & Social Health

Mental, emotional, and social ~~well-being~~ health ~~is a~~are foundations for building ~~good health~~wellness. Instruction includes a positive sense of self-image and self-esteem, recognizing emotions and socially appropriate responses of self and others. ~~which includes a sense of security, identity, belonging, purpose and competence in order to strive toward a healthy and productive life.~~

Prevention & Control of Disease

Individuals ~~can~~ have a considerable measure of control over their own health and the ~~chances~~ likelihood of contracting most illnesses. Health-related choices and decisions regarding prevention of communicable and non-communicable diseases can include recognizing risk factors, and ~~-~~identifying methods of contraction and transmission~~,~~. ~~as well as the prevention and treatment of disease. Information should be factual, medically accurate, objective and developmentally appropriate.~~

Consumer & Community Health

~~Consumers~~ Children need to understand ~~how health care services are provided as well as how individuals can take an active role in deciding on the use of health related services and products. Community health may include recognizing appropriate health professionals and products.~~the different types of health care professionals and the benefit of health care services. Instruction includes how to identify trusted adults and professionals, and how to access reliable product information.

Growth, Development & Family Life

A healthy family ~~unit~~ is vital to the well-being and successful development of children and youth. ~~Growth and development~~Instruction includes the stages of life~~,~~ and changes in relationships with others that accompany social development ~~and the aging process~~. Information should be factual, medically accurate, and objective ~~and developmentally appropriate~~.~~.~~

Environmental Health

~~Individuals~~ Students need to be aware of the impact of environmental issues and hazards on personal health and the impact humans have on the environment. ~~Environmental health may~~Instruction includes precautions and behaviors to safeguard personal health~~,~~ and practices that will reverse or slow down environmental pollution and related problems.

Goal 1.1: Students will comprehend core concepts related to health promotion and disease prevention to enhance health including: Alcohol, Tobacco and Other Drugs; Nutrition and Physical Activity, Injury Prevention and Safety; Mental, Emotional, and Social Health; Prevention and Control of Disease; Consumer and Community Health; Growth, Development and Family Life; and Environmental Health.

K-2nd Grade Objectives

Objective(s): By the end of Second Grade, the student will be able to:

K-2.H.1.1.1. Identify that healthy behaviors affect personal health.

K-2.H.1.1.2. Recognize that there are multiple dimensions (e.g.,~~(i.e.~~ emotional, ~~intellectual~~mental, physical, and social) of health.

K-2.H.1.1.3. Describe ways to prevent communicable diseases.

K-2.H.1.1.4. List ways to prevent common childhood injuries.

K-2.H.1.1.5. Describe why it is important to seek health care.

K-2.H.1.1.6. ~~Identify~~ Describe the impact of health behaviors on body systems.

Standard 2: Analyzing Influences

Goal 1.1: Students will analyze the influence of family, peers, culture, media, technology, and other factors on health behavior.

K-2nd Grade Objectives

Objective(s): By the end of Second Grade, the student will be able to:

K-2.H.2.1.1	Identify how the family influences personal health practices and behaviors.
K-2.H.2.1.2	Identify what the school can do to support personal health practices and behaviors.
K-2.H.2.1.3	Describe how the media can influence health behaviors.

Standard 3: Accessing Information
Goal 1.1: Students will demonstrate the ability to access valid information and products and services to enhance health.

K-2nd Grade Objectives
Objective(s): By the end of Second Grade, the student will be able to:

K-2.H.3.1.1.	Identify trusted adults and professionals who can help promote health.
K-2.H.3.1.2.	Identify ways to locate~~d~~ school and community health helpers.

Standard 4: Interpersonal Communication
Goal 1.1: Students ~~(space)~~ will demonstrate the ability to use interpersonal communication skills to enhance health and avoid or reduce health risks.

K-2nd Grade Objectives
Objective(s): By the end of Second Grade, the student will be able to:

K-2.H.4.1.1.	Demonstrate healthy ways to express needs, wants, and feelings.
K-2.H.4.1.2	Demonstrate listening skills to enhance health.
K-2.H.4.1.3	Demonstrate ways to respond ~~when in~~to an unwanted, threatening, or dangerous situation.
K-2.H.4.1.4.	Demonstrate ways to tell a trusted adult if threatened or harmed.

Standard 5: Decision Making
Goal 1.1: Students will demonstrate the ability to use decision-making skills to enhance health.

K-2nd Grade Objectives
Objective(s): By the end of Second Grade, the student will be able to:

K-2.H.5.1.1	Identify situations when a health-related decision is needed.
K-2.H.5.1.2	Differentiate between situations when a health-related decision can be made individually or when assistance is needed.

Standard 6: Goal Setting
Goal 1.1: Students will demonstrate the ability to use goal-setting skills to enhance health.

K-2nd Grade Objectives

Objective(s): By the end of Second Grade, the student will be able to:

K-2.H.6.1.1. Identify a short-term personal health goal and take action towards achieving the goal.

K-2.H.6.1.2. Identify who can help when assistance is needed to achieve a personal health goal~~.(spacing)~~.

Standard 7: Practice Healthy Behavior

Goal 1.1~~.~~: Students will demonstrate the ability to practice health-enhancing behaviors and avoid or reduce health risks.

K-2nd Grade Objectives

Objective(s): By the end of Second Grade, the student will be able to:

K-2.H.7.1.1. Demonstrate healthy practices and behaviors to maintain or improve personal health (e.g., reducing spread of germs, encouraging healthy food behavior and physical activity).

K-2.H.7.1.2. Demonstrate behaviors that avoid or reduce health risks.

Standard 8: Advocacy

Goal 1.1~~.~~: Students will demonstrate the ability to advocate for personal, family, and community health.

K-2nd Grade Objectives

Objective(s): By the end of Second Grade, the student will be able to:

K-2.H.8.1.1. Make requests to promote personal health.

K-2.H.8.1.2. Encourage peers and family to make positive health choices.

IDAHO CONTENT STANDARDS
HEALTH EDUCATION
~~**Grades 3-5**~~

Grades 3-5

Standard 1: Comprehend Core Concepts

Core Concepts of Health Education for Grades 3-5 are defined below:

Alcohol, Tobacco & Other Drugs

The use of alcohol, tobacco, and other drugs has major implications in the lifelong health of individuals. ~~Implications~~ Instruction includes the effects, influences, environmental exposure, prevention and treatment of the use of alcohol, tobacco products, and other types of drugs on the body and mind.

Nutrition & Physical Activity

~~To be ready t~~To learn and to achieve their fullest potential, children need to be well nourished and physically active. In order to enhance physical, mental, emotional, and social ~~health~~wellness, students ~~need to~~will acquire the knowledge and skills to make healthy food choices and engage in lifelong physical activity.

Injury Prevention & Safety

Unintentional and intentional injuries rank among the greatest threats to the health of ~~children and young adults~~youth. ~~Knowledge of~~Instruction includes prevention through safe living ~~habits~~skills and choices, ~~healthy decisions,~~ violence prevention, emergency response and preparedness. ~~an awareness~~Understanding of the consequences of one's decisions~~,~~ will help to prevent many injuries.

Mental, Emotional & Social Health

Mental, emotional, and social ~~wellbeing~~ health ~~is a~~are foundations for building ~~good health~~ wellness.~~which includes a sense of security, identity, belonging, purpose and competence in order to strive toward a healthy and productive life~~ Instruction includes a positive sense of self-image and self-esteem, recognizing emotions and socially appropriate responses to self and others.

Prevention & Control of Disease

Individuals ~~can~~ have a considerable measure of control over their own health and the likelihood ~~, including the risks~~ of contracting most illnesses. Health-related choices and decisions regarding prevention of communicable and non-communicable diseases can include recognizing risk factors, and identifying methods of contraction and transmission~~, as well as the prevention and treatment of disease including HIV.~~ to include universal precautions. ~~-~~Information should be factual, medically accurate, and objective~~ and developmentally appropriate~~.

Consumer & Community Health

~~Consumers~~ Youth need to understand how health care services are provided~~ and~~ as well as how individuals can take an active role in determining the use of health related services and products. Community health includes providing valid and appropriate health information, education, services, and products.

Growth, Development & Family Life

A healthy family ~~unit~~ is vital to the well-being and successful development of children and youth. ~~Growth and development~~Instruction includes the stages of life, changes that occur during puberty, and changes in relationships with others that accompany social development~~ and the aging process. Family living includes~~ healthy relationships, and information regarding growth and development~~, and disease including HIV and their prevention~~. Information should be factual, medically accurate, and objective~~ and developmentally appropriate~~.

~~*Reference to Idaho Education Code Title 33, Chapter 16, Sections 1608-1611~~

Environmental Health

~~Individuals~~ Students need to be aware of the impact of environmental issues~~ and~~, hazards on personal health and the impact humans have on the environment. ~~Environmental health may~~Instruction includes precautions and behaviors to safeguard personal health ,~~,~~ and practices that will reverse or slow down environmental pollution and related problems.

Goal 1.1: Students will comprehend core concepts related to health promotion and disease prevention to enhance health including: Alcohol, Tobacco and Other Drugs; Nutrition and Physical Activity, Injury Prevention and Safety; Mental, Emotional, and Social Health; Prevention and Control of Disease; Consumer and Community Health; Growth, Development and Family Life; and Environmental Health.~~.~~

Grade 3-5 Objectives

Objective(s): By the end of Fifth Grade, the student will be able to:

3-5.H.1.1.1. Describe the relationship between healthy behaviors and personal health.

3-5.H.1.1.2 Identify examples of emotional, intellectual, physical, and social health.

3-5.H.1.1.3 Describe ways in which a safe and healthy school and community environment can promote personal health.

3-5.H.1.1.4 Describe ways to prevent common childhood injuries and health problems (~~i.e~~e.g.~~.~~, second hand smoke/vapors from vaping).

3-5.H.1.1.5. Describe when it is important to seek health care.

3-5.H.1.1.6. Describe the impact of health behaviors on body systems.

Standard 2: Analyzing Influences

Goal 1.1: Students will analyze the influence of family, peers, culture, media, technology, and other factors on health behavior.

Grade 3-5 Objectives

Objective(s): By the end of Fifth Grade, the student will be able to:

3-5.H.2.1.1	Describe how the family influences personal health practices and behaviors.
3-5.H.2.1.2	Identify the influences of culture on health practices and behaviors.
3-5.H.2.1.3	Identify how peers can influence healthy and unhealthy behaviors.
3-5.H.2.1.4	Describe how the school and community can support personal health practices and behaviors.
3-5.H.2.1.5	Explain how media influences thoughts, feelings, and health behaviors.
3-5.H.2.1.~~5~~ 6	Describe ways that technology can influence~~s~~ personal health.

Standard 3: Accessing Information

Goal 1.1~~.~~: Students will demonstrate the ability to access valid information and products and services to enhance health.

Grade 3-5 Grade Objectives

Objective(s): By the end of Fifth Grade, the student will be able to:

3-5.H.3.1.1	Identify characteristics of valid health information, products, and services.
3-5.H.3.1.2	Locate resources from home, school, and community that provide valid health information.

Standard 4: Interpersonal Communication

Goal 1.1: Students will demonstrate the ability to use interpersonal communication skills to enhance health and avoid or reduce health risks.

Grade 3-5 Objectives

Objective(s): By the end of Fifth Grade, the student will be able to:

3-5.H.4.1.1	Demonstrate effective verbal and nonverbal communication skills to enhance health.
3-5.H.4.1.2	Demonstrate refusal skills that avoid or reduce health risks.
3-5.H.4.1.3	Demonstrate nonviolent strategies to manage or resolve conflict.
3-5.H.4.1.4	Demonstrate how to ask for assistance to enhance personal health.

Standard 5: Decision Making

Goal 1.1: Students will demonstrate the ability to use decision-making skills to enhance health.

Grade 3-5 Objectives

Objective(s): By the end of Fifth Grade, the student will be able to:

3-5.H.5.1.1	Identify health-related situations that might require a thoughtful decision.
3-5.H.5.1.2	Analyze when assistance is needed when making a health-related decision.
3-5.H.5.1.3	List healthy options to health related issues or problems.
3-5.H.5.1.4	Predict the potential outcomes of each option when making a health-related decision.
3-5.H.5.1.5	Choose a healthy option when making a decision.
3-5.H.5.1.6	Describe the outcomes of a health related decision~~s~~.

Standard 6: Goal Setting

Goal 1.1: Students will demonstrate the ability to use goal-setting skills to enhance health.

Grades 3-5 Objectives

Objective(s): By the end of Fifth Grade, the student will be able to:

3-5.H.6.1.1	Set a personal health goal and track progress toward its achievement~~.~~; evaluate results of decision.
3-5.H.6.1.2	Identify resources to assist in achieving a personal health goal.

Standard 7: Practice Healthy Behavior

Goal 1.1~~. –~~: Students will demonstrate the ability to practice health-enhancing behaviors and avoid or reduce health risks.

Grades 3-5 Objectives

Objective(s): By the end of Fifth Grade, the student will be able to:

3-5.H.7.1.1	Identify responsible personal health behaviors.
3-5.H.7.1.2	Demonstrate a variety of healthy practices and behaviors to maintain or improve personal health.
3-5.H.7.1.3	Demonstrate a variety of behaviors that avoid or reduce health risks.

Standard 8: Advocacy

Goal 1.1~~. –~~: Students will demonstrate the ability to advocate for personal, family, and community health.

Grades 3-5 Objectives

Objective(s): By the end of Fifth Grade, the student will be able to:

3-5.H.8.1.1	Express opinions and give accurate information about health issues.
3-5.H.8.1.2	Encourage others to make positive health choices.

IDAHO CONTENT STANDARDS
HEALTH EDUCATION
~~**Grades 6-8**~~

Grades 6-8

Standard 1: Comprehend Core Concepts

Core Concepts of Health Education for Grades 6-8 are defined below:

Alcohol, Tobacco & Other Drugs

The use of alcohol, tobacco, and other drugs~~,~~ has major implications in the lifelong health of individuals. ~~This~~ Instruction includes the effects, influences, environmental exposure, prevention, and treatment of the use of alcohol, tobacco products, and other types of drugs on the body and mind.

Nutrition & Physical Activity

~~Youth are best~~To be ready to learn and achieve their fullest ~~potential~~ potential~~when they are~~, adolescents need to be well nourished and physically active. ~~Nutrition and physical activity education increases knowledge and skills~~ In order to enhance physical, mental, emotional, and social wellness, students will acquire the knowledge and skills to make healthy food choices and to engage in lifelong physical activity. ~~which will promote health and preventable diseases. This includes connections to physical, mental, emotional and social health; energy level; self image; and physical fitness.~~ The benefits include enhanced energy level, academic performance, self-image and ability to prevent disease.

Injury Prevention & Safety

Unintentional and intentional injuries rank among the greatest threats to the health of ~~young~~ adolescents and adults. ~~Knowledge about~~Instruction includes prevention through safe living ~~habits~~ skills and choices, ~~healthy decisions,~~ violence prevention, emergency response and preparedness~~,~~. ~~and an understanding~~ Understanding of the consequences of one's decisions will help to prevent many injuries. Adolescents need to be aware they are responsible for their own safety and the safety of others.

Mental, Emotional & Social Health

Mental, emotional, and social ~~wellbeing~~ health ~~is a~~are foundations for building ~~good health~~wellness ~~and includes a sense of security, identity, belonging, purpose and competence in order to strive toward a healthy and productive life.~~ Instruction includes a positive sense of self-image and self-esteem, recognizing emotions, and socially appropriate responses of self and others. Knowledge and skills ~~may~~ include emotional intelligence, ~~suicide prevention,~~ stress management, mental illness, suicide prevention, healthy relationships, acceptance of self and others, communication skills, and conflict resolution~~, and mental illness~~.

Prevention & Control of Disease

Individuals have a considerable measure of control over their own health and the risk of contracting most illnesses. Health-related choices and decisions regarding prevention of communicable and non-communicable diseases~~,~~ can include recognizing risk factors~~,~~ and identifying methods of contraction and transmission, ~~as well as the prevention and treatment of disease~~ to include universal precautions. Information and discussion of sexually transmitted diseases~~,~~ and HIV ~~and AIDS~~ are important components of this content area. Information should be factual, medically accurate, and objective ~~and developmentally appropriate~~.

Consumer & Community Health

~~Consumers~~ Adolescents need to understand how health care services are provided as well as how individuals can take an active role in determining the use of health related services and products. Community health may include recognizing and accessing valid and appropriate health information, education, services, and products.

Growth, Development & Family Life

A healthy family ~~unit~~ is vital to the well-being and successful development of ~~adolescence~~adolescents. ~~Growth and development~~Instruction includes the stages of life, changes that occur during puberty, ~~and~~ changes in relationships with others that accompany social development ~~and the aging process.~~, acceptance of self and others, ~~Family living includes~~ healthy relationships and sexuality, consequences of sexual activity, encouragement of abstinence from sexual activity, sexually transmitted diseases ~~including HIV~~, methods of prevention and pregnancy prevention~~,~~. ~~and methods of prevention.~~ Information should be factual, medically accurate, and objective ~~and developmentally appropriate~~.

~~*Reference to Idaho Education Code Title 33, Chapter 16: Sections 1608-1611~~

Environmental Health

~~Individuals~~ Students need ~~an awareness~~to be aware of the impact of environmental issues and hazards on personal health and the impact humans have on the environment. ~~Environmental health may~~Instruction includes precautions and behaviors to safeguard personal health and practices that reverse or slow down environmental pollution and related problems.

Goal 1.1: Students will comprehend core concepts related to health promotion and disease prevention to enhance health including: Alcohol, Tobacco and Other Drugs; Nutrition and Physical Activity, Injury Prevention and Safety; Mental, Emotional, and Social Health; Prevention and Control of Disease; Consumer and Community Health; Growth, Development and Family Life; and Environmental Health.

Grade 6-8 Objectives
Objective(s): By the end of Eighth Grade, the student will be able to:

6-8.H.1.1.1 Analyze the relationship between behaviors, body systems, and ~~personal health~~wellness.

6-8.H.1.1.2 Describe the interrelationships of ~~emotional, intellectual,~~ mental, emotional, physical, and social health in adolescence.

6-8.H.1.1.3 Analyze how the environment, environmental exposure (~~i.e.,~~e.g., second hand smoke/vapors) ~~affects personal health~~and personal health are related.

6-8.H.1.1.4 Describe how family history can affect personal health.

6-8.H.1.1.5 Describe ways to reduce or prevent injuries and adolescent health problems.

6-8.H.1.1.6 Explain how appropriate health care can promote ~~personal health~~wellness.

6-8.H.1.1.7 Describe the benefits of and barriers to practicing healthy behaviors.

6-8.H.1.1.8 Examine the consequences and the likelihood of injury or illness if engaging in unhealthy behaviors.

Standard 2: Analyzing Influences

Goal 1.1: Students will analyze the influence of family, peers, culture, media, technology, and other factors on health behavior.

Grade 6-8 Objectives

Objective(s): By the end of Eighth Grade, the student will be able to:

6-8.H.2.1.1 Examine how family, culture, peers, school, and community influence healthy and unhealthy behaviors (e.g., social norms).

6-8.H.2.1.2 Analyze the influence of media and technology on personal and family health (e.g., social media and internet safety and responsibility).

~~6-8.H.2.1.3 Explain how the perceptions of norms influence healthy and unhealthy behaviors.~~

6-8.H.2.1.~~4~~ 3 Explain the influence of personal values and beliefs on individual health practices and behaviors.

6-8.H.2.1.~~5~~ 4 Describe how some health risk behaviors can influence the likelihood of engaging in unhealthy behaviors (e.g., using drugs to fit in).

6-8.H.2.1.~~6~~ 5 Explain how school and public health policies can influence health promotion and disease prevention.

Standard 3: Accessing Information

Goal 1.1~~.~~: Students will demonstrate the ability to access valid information and products and services to enhance health.

Grade 6-8 Objectives

Objective(s): By the end of Eighth Grade, the student will be able to:

6-8.H.3.1.1 Analyze the validity of healthy information, products, and services.
6-8.H.3.1.2 Access valid health information from home, school, and community.
6-8.H.3.1.3 Locate reliable and valid health products and services and determine accessibility.
6-8.H.3.1.4 Describe situations that may require professional health services.

Standard 4: Interpersonal Communication
Goal 1.1: Students will demonstrate the ability to use interpersonal communication skills to enhance health and avoid or reduce health risks.

Grade 6-8 Objectives
Objective(s): By the end of Eighth Grade, the student will be able to:

6-8.H.4.1.1 Apply effective verbal and nonverbal communication skills to enhance health.
6-8.H.4.1.2 Demonstrate refusal and negotiation skills that avoid or reduce health risks.
6-8.H.4.1.3 Demonstrate effective conflict management or resolution strategies.
6-8.H.4.1.4 Demonstrate how ~~to ask for~~request and offer assistance to enhance the health of self and others (e.g., suicide prevention, relationship violence and bullying).

Standard 5: Decision Making
Goal 1.1: Students will demonstrate the ability to use decision-making skills to enhance health.

Grade 6-8 Objectives
Objective(s): By the end of Eighth Grade, the student will be able to:

6-8.H.5.1.1 Identify circumstances that can help or hinder healthy decision-making.
6-8.H.5.1.2 Determine when health-related situations require the application of a thoughtful decision-making process (e.g., alcohol, tobacco and other drug use and consequences of a criminal record, recreational safety, texting, social media and general online presence, physical activity, nutritional choices).

~~.~~

6-8.H.5.1.3 Distinguish when individual or collaborate decision-making is appropriate.
6-8.H.5.1.4 Distinguish between healthy and unhealthy alternatives to health-related issues or problems.
6-8.H.5.1.5 Predict the potential short-term and long-term impact of each alternative on self, ~~and~~ others, and the environment.

6-8.H.5.1.6 Choose healthy alternatives over unhealthy alternatives when making a decision.
6-8.H.5.1.7 Analyze the outcomes of a health-related decision.

Standard 6: Goal Setting
Goal 1.1: Students will demonstrate the ability to use goal-setting skills to enhance health.

Grades 6-8 Objectives
Objective(s): By the end of Eighth Grade, the student will be able to:
6-8.H.6.1.1 Assess personal health practices.
6-8.H.6.1.2 Develop a goal to adopt, maintain, or improve a personal health practice.
6-8.H.6.1.3 Apply effective strategies and skills needed to attain a personal health goal (e.g., S.M.A.R.T. goal setting strategy).

Standard 7: Practice Healthy Behavior
Goal 1.1~~.~~: Students will demonstrate the ability to practice health-enhancing behaviors and avoid or reduce health risks.

Grades 6-8 Objectives
Objective(s): By the end of Eighth Grade, the student will be able to:
6-8.H.7.1.1 Explain the importance of assuming responsibility for personal health behaviors.
6-8.H.7.1.2 Demonstrate healthy practices and behaviors that will maintain or improve the health of self and others.
6-8.H.7.1.3 Demonstrate behaviors that avoid or reduce health risks to self and others.
6-8 H.7.1.4. Explain the importance of personal hygiene, self-care, food behavior, and physical activity.

Standard 8: Advocacy
Goal 1.1~~.~~: Students will demonstrate the ability to advocate for personal, family, and community health.

Grades 6-8 Objectives
Objective(s): By the end of Eighth Grade, the student will be able to:
6-8.H.8.1.1 State a health-enhancing position on a topic and support it with accurate information.
6-8.H.8.1.2 Demonstrate how to influence and support others to make positive health choices.
6-8.H.8.1.3 Work cooperatively to advocate for the health of individuals, families,

	schools and the community.
6-8.H.8.1.4	Identify ways in which health messages and communication techniques can be altered for different audiences.

IDAHO CONTENT STANDARDS
HEALTH EDUCATION
~~Grades 9-12~~

Grades 9-12

Standard 1: Comprehend Core Concepts

Core Concepts of Health Education for Grades 9-12 are defined below:

Alcohol, Tobacco & Other Drugs

The use of alcohol, tobacco, and other drugs~~,~~ has major implications in the lifelong health of individuals. ~~These~~ Instruction includes the effects, influences, environmental exposure, prevention and treatment of the use of alcohol, tobacco products, and other drugs on the body and mind.

Nutrition & Physical Activity

~~For adolescents~~To be ready to learn and achieve to their fullest potential ~~they~~ adolescents need to acquire knowledge and skills to ~~make healthy choices in food selection and engage in~~be well nourished and ~~lifelong~~ physically ~~activity~~active. ~~This~~ The ~~knowledge~~ benefits include~~s the link between healthy eating and exercise with physical, mental, emotional and social health; energy level; self image; and physical fitness~~ enhanced energy level, academic performance, self-image and ability to prevent disease.

Injury Prevention & Safety

Unintentional and intentional injuries rank among the greatest threats to the health of adolescence and adults. ~~Adolescents require knowledge that prevention~~Instruction includes safe living ~~habits~~skills and choices, ~~healthy decisions,~~ violence prevention, and emergency response and preparedness. ~~an understanding of the consequences of one's decisions.~~ Young adults need to be aware they are responsible for their own safety and the safety of others.

Mental, Emotional & Social Health

Mental, emotional, and social ~~well-being~~health are foundations for building ~~good health~~wellness. ~~These foundations~~Instruction includes ~~a sense of security, identity, belonging, purpose and competence in order to strive toward a healthy and productive life~~a positive sense of self-image and self-esteem, recognizing emotions and socially appropriate responses of self and others. Knowledge and skills ~~may~~ include emotional intelligence, ~~suicide prevention,~~ stress management, recognizing mental illness, suicide prevention, healthy relationships, communication skills, and conflict resolution~~, and mental illness~~.

Prevention & Control of Disease

Individuals have a considerable measure of control over their own health and the ~~risks~~ chance of contracting most illnesses. Health-related choices and decisions regarding prevention of communicable and non-communicable diseases include recognizing risk factors~~,~~ and identifying methods of contraction and transmission, ~~as well as the prevention and treatment of disease~~ to include universal precautions. ~~Accurate information~~ Information and discussion of sexually transmitted diseases ~~,~~ and HIV ~~infection and AIDS~~ are ~~necessary and~~ important components of this content area. Information should be factual, medically accurate,~~,~~ and objective ~~and developmentally appropriate~~.

Consumer & Community Health

~~Consumers~~ Adolescents need to understand how health care services are provided as well as how individuals can take an active role in determining the use of health related services and products. Consumer and community health include recognizing and accessing valid and appropriate health information, services, and products. ~~This~~ Instruction includes knowledge about health insurance, health related research, advertising, and fraudulent claims.

Growth, Development & Family Life

A healthy family ~~unit~~ is vital to the well-being and successful development of ~~adolescence~~adolescents. ~~Growth and development~~Instruction includes the stages of life, ~~and~~ changes in relationships with others that accompany social development, ~~and the aging process~~the acceptance of self and others,~~. Family living includes the following topics:~~ healthy relationships and sexuality, consequences of sexual activity (e.g., personal, legal and economic responsibilities of parenthood), encouragement of abstinence from sexual activity, sexually transmitted diseases (~~i.e~~e.g., transmission and prevention), and ~~including HIV and their prevention, as well as methods of preventing~~ pregnancy prevention. ~~Knowledge of~~Information should be factual, medically accurate, and objective. ~~information is important along with personal, legal and economic responsibilities of parenthood and other consequences of sexual activity.~~

~~*Reference to Idaho Education Code Title 33, Chapter 16, Sections 1608-1611~~

Environmental Health

~~Individuals~~ Students need to be aware of the impact of environmental issues and hazards on personal health and the impact humans have on the environment. ~~Environmental health~~Instruction includes precautions and behaviors to safeguard personal health, and practices that ~~will~~ reverse or slow down environmental pollution and related problems.

Goal 1.1: Students will comprehend core concepts related to health promotion and disease prevention to enhance health including: Alcohol, Tobacco and Other Drugs; Nutrition and Physical Activity, Injury Prevention and Safety; Mental, Emotional, and Social Health; Prevention and Control of Disease; Consumer and Community Health; Growth, Development and Family Life; and Environmental Health.

Grade 9-12 Objectives
Objective(s): By the end of Twelfth Grade, the student will be able to:

9-12.H.1.1.1 Predict how behaviors can affect ~~health status~~wellness.
9-12.H.1.1.2 Describe the interrelationships of emotional, ~~intellectual~~mental, physical, and social health.
9-12.H.1.1.3 Analyze how environment and ~~personal health~~wellness are interrelated (e.g., second hand smoke/vapors from vaping).
9-12.H.1.1.4 Analyze how genetics and family history can affect personal health.
9-12.H.1.1.5 Propose ways to reduce health problems.
9-12.H.1.1.6 Analyze the relationship between access to health care and health status.
9-12.H.1.1.7 Compare and contrast the benefits of and barriers to practicing a variety of healthy behaviors.
9-12.H.1.1.8 Analyze the potential severity of health problems that result from engaging in unhealthy behaviors.

Standard 2: Analyzing Influences
Goal 1.1: Students will analyze the influence of family, peers, culture, media, technology, and other factors on health behavior.

Grade 9-12 Objectives
Objective(s): By the end of Twelfth Grade, the student will be able to:

9-12.H.2.1.1 Analyze how the family and culture influence health beliefs and behaviors.
9-12.H.2.1.2 Analyze how peers influence health beliefs and behaviors (e.g., social norms).
9-12.H.2.1.3 Evaluate how the school and community can affect personal health practice and behaviors.
9-12.H.2.1.4 Analyze how the media and technology influence health beliefs and behaviors (e.g., social media, internet safety, and responsibility).
~~9-12.H.2.1.5 Analyze how the perception of norms influences healthy and unhealthy behaviors.~~
9-12.H.2.1.~~6~~ 5 Analyze how some health risk behaviors can influence the likelihood of engaging in unhealthy behaviors (e.g., using drugs to fit in).
9-12.H.2.1.~~7~~ 6 Analyze how public health policies and government regulations can influence health promotion and disease prevention.

Standard 3: Accessing Information
Goal 1.1~~.~~: Students will demonstrate the ability to access valid information and products and services to enhance health.

Grade 9-12 Objectives
Objective(s): By the end of Twelfth Grade, the student will be able to:

9-12.H.3.1.1 Evaluate the validity of health information, products, and services.
9-12.H.3.1.2 Determine the accessibility of health information, products, and services.
9-12.H.3.1.3 Access valid and reliable health information, products, and services.
9-12.H.3.1.4 Use resources from home, school, and community that provide valid health information.
9-12.H.3.1.5 Determine when professional health services may be required.

Standard 4: Interpersonal Communication
Goal 1.1: Students will demonstrate the ability to use interpersonal communication skills to enhance health and avoid or reduce health risks.

Grade 9-12 Objectives
Objective(s): By the end of Twelfth Grade, the student will be able to:
9-12.H.4.1.1 Use skills for communicating effectively with family, peers, and others to enhance health.
9-12.H.4.1.2 Demonstrate refusal, ~~negotiation~~conflict resolution, and collaboration skills to enhance health and avoid or reduce health risks.
9-12.H.4.1.3 Demonstrate strategies to prevent, manage, or resolve interpersonal conflicts without harming self or others.
9-12.H.4.1.4 Demonstrate how to ask for and offer assistance to enhance the health of self and others (e.g., suicide prevention, relationship violence, and bullying).

Standard 5: Decision Making
Goal 1.1: Students will demonstrate the ability to use decision-making skills to enhance health.

Grade 9-12 Objectives
Objective(s): By the end of Twelfth Grade, the student will be able to:

9-12.H.5.1.1 Examine barriers that can hinder healthy decision-making.
9-12.H.5.1.2 Determine the value of applying a thoughtful decision-making process in health-related situations, (e.g., alcohol, tobacco and other drug use and consequences of a criminal record, recreational safety, safe driving behaviors, testing, social media and general online presence, food behavior, and physical activity).

9-12.H.5.1.3 Justify when individual or collaborative decision-making is appropriate.
9-12.H.5.1.4 Generate alternatives to health-related issues or problems.
9-12.H.5.1.5 Predict the potential short-term and long-term impact of each alternative on self, ~~and~~ others, and the environment.

9-12.H.5.1.6 Defend the healthy choice when making decisions.
9-12.H.5.1.7 Evaluate the effectiveness of health-related decisions.

Standard 6: Goal Setting
Goal 1.1 Students will demonstrate the ability to use goal-setting skills to enhance health.

Grades 9-12 Objectives
Objective(s): By the end of Twelfth Grade, the student will be able to:
9-12.H.6.1.1 Assess personal health practices and overall health status.
9-12.H.6.1.2 Develop a plan to attain a personal health goal that address~~es~~ strengths, needs, and risks.
9-12.H.6.1.3 Implement effective strategies and monitor progress in achieving a personal health goal (e.g., S.M.A.R.T. goal setting strategy).
9-12.H.6.1.4 Formulate an effective long-term personal health plan.

Standard 7: Practice Healthy Behavior
Goal 1.1~~. –~~: Students will demonstrate the ability to practice health-enhancing behaviors and avoid or reduce health risks.

Grades 9-12 Objectives
Objective(s): By the end of Twelfth Grade, the student will be able to:
9-12.H.7.1.1 Analyze the role of individual responsibility in enhancing health.
9-12.H.7.1.2 Demonstrate a variety of healthy practices and behaviors that will maintain or improve the health of self and others.
9-12.H.7.1.3 Explain the importance of personal hygiene, self-care (e.g., self-exams), food behavior, and physical activity.
9-12.H.7.1.~~3~~4 Demonstrate a variety of healthy practices and behaviors that avoid or reduce health risks to self and others.
9-12.H.7.1.5. Instruction provided on hands-only CPR training, including proper utilization of an AED.

Standard 8: Advocacy
Goal 1.1~~. –~~: Students will demonstrate the ability to advocate for personal, family, and community health.

Grades 9-12 Objectives
Objective(s): By the end of Twelfth Grade, the student will be able to:
9-12.H.8.1.1 Use accurate ~~peer and societal norms~~information to formulate a health-enhancing message.

9-12.H.8.1.2	Demonstrate how to influence and support others to make positive health choices.
9-12.H.8.1.3	Work cooperatively as an advocate for improving personal, family, and community health.
9-12.H.8.1.4	Adapt health messages and communication techniques to target a specific audience.

~~IDAHO CONTENT STANDARDS~~
~~GRADE K-3~~
~~HUMANITIES: VISUAL ARTS~~

~~Standard 1: Historical and Cultural Contexts~~

~~Students demonstrate an understanding of how people and cultures are connected across time. Humanities instruction prepares students to work and live as global citizens because of their greater understanding of their own culture and the cultures of others.~~

~~Students in grades K-3 discuss key differences and similarities in artworks. Students identify the purpose or function of an artwork and explain how it is a record of human ideas and a reflection of its culture.~~

~~Goal 1.1: Discuss the historical and cultural contexts of the visual arts. Objective(s): By~~

~~the end of Grade 3, the student will be able to:~~

~~K.VA.1.1.1 Compare and contrast key differences and similarities in art works from different time periods or cultures.~~
~~K.VA.1.1.2 Identify the purpose or function of a work of art that was created in the past.~~
~~K.VA.1.1.3 Explain how art is a visual record of human ideas and a reflection of the culture of its origin.~~

~~Goal 1.2: Discuss the interconnections between the visual arts and societies. Objective(s): By~~

~~the end of Grade 3, the student will be able to:~~

~~K.VA.1.2.1 Name ways in which a work of visual art is reflects the culture from which it came.~~
~~K.VA.1.2.2 Identify ideas and emotions that are expressed through visual arts and other disciplines.~~

~~Standard 2: Critical Thinking~~

~~Students understand the purposes and functions of the arts. They build literacy and develop critical thinking through analysis and interpretation.~~

~~Students in grades K-3 use appropriate arts vocabulary to discuss works of art. Students identify the visual arts as a form of communication and a way to create meaning. Students identify characteristics of various visual art forms. Students discuss that individuals respond to art in a variety of ways. Students respond to art respectfully. Students use problem-solving techniques to respond to, create, and refine visual art forms.~~

~~Goal 2.1: Conduct analyses in the visual arts.~~

~~Objective(s): By the end of Grade 3, the student will be able to:~~

~~K.VA.2.1.1 Identify and respond to characteristics and content of various visual art forms.~~
~~K.VA.2.1.2 Examine the visual arts as a form of communication.~~
~~K.VA.2.1.3 Use arts vocabulary to discuss specific works of art.~~

~~K.VA.2.1.4 Identify the elements (line, shape, color) in art works and environments.~~

~~**Goal 2.2: Exercise sound reasoning and understanding in making choices in the visual arts.**~~

~~**Objective(s): By the end of Grade 3, the student will be able to:**~~

~~K.VA.2.2.1 Discuss the importance of visual art in one's own life.~~
~~K.VA.2.2.2 Discuss how art works can elicit different responses.~~
~~K.VA.2.2.3 Express personal preferences for specific works and styles.~~
~~K.VA.2.2.4 Identify and demonstrate appropriate behavior when attending and/or participating in arts events.~~
~~K.VA.2.2.5 Show respect for personal work and works of others.~~
~~K.VA.2.2.6 Dictate or write an artist's statement (tell what the work is about).~~

~~**Standard 3: Performance**~~

~~Students engage in the creation of original works and/or the interpretation of works of others, culminating in a performance or presentation.~~

~~Students in grades K-3 use art techniques, media, and processes to create and replicate works of art. Students demonstrate safe and appropriate use of art materials. Students apply elements of color, shape, and line in artwork. Students create artwork about self, family, and personal experiences.~~

~~**Goal 3.1: Demonstrate skills essential to the visual arts. Objective(s): By**~~

~~**the end of Grade 3, the student will be able to:**~~

~~K.VA.3.1.1 Acquire and use skills necessary for applying arts techniques, media, and processes.~~
~~K.VA.3.1.2 Demonstrate safe and proper use, care, and storage of media, materials, and equipment.~~
~~K.VA.3.1.3 Apply the elements of color, shape, and line in artwork. K.VA.3.1.4 Demonstrate skills of observation in the production of artwork.~~

~~**Goal 3.2: Communicate through the visual arts, applying artistic concepts, knowledge, and skills.**~~

~~**Objective(s): By the end of Grade 3, the student will be able to:**~~

~~K.VA.3.2.1 Name and use different art materials to express an idea. K.VA.3.2.2 Apply artistic concepts, knowledge, and skills to original artwork.~~
~~K.VA.3.2.3 Replicate or imitate an existing work, respecting the intent of its original creator.~~

~~**Goal 3.3: Communicate through the visual arts with creative expression. Objective(s): By**~~

~~**the end of Grade 3, the student will be able to:**~~

~~K.VA.3.3.1 Experiment with different materials, techniques, and processes in the visual arts.~~
~~K.VA.3.3.2 Create artwork about self, family, and personal experiences.~~

~~IDAHO CONTENT STANDARDS~~
~~GRADE 4-5~~
~~HUMANITIES: VISUAL ARTS~~

~~Students are expected to know content and apply skills from previous grades.~~ Standard

1~~: Historical and Cultural Contexts~~

~~Students demonstrate an understanding of how people and cultures are connected across time. Humanities instruction prepares students to work and live as global citizens because of their greater understanding of their own culture and the cultures of others.~~

~~Students in grades 4-5 compare and contrast specific works of art from different time periods and cultures. Students identify specific works of art and explain how they reflect events in history.~~

~~Goal 1.1: Discuss the historical and cultural contexts of the visual arts. Objective(s): By~~

~~the end of Grade 5, the student will be able to:~~

- ~~4-5.VA.1.1.1 Compare and contrast specific works of art from different time periods or cultures.~~
- ~~4-5.VA.1.1.2 Identify specific works as belonging to a particular era in art history.~~
- ~~4-5.VA.1.1.3 Explain how a specific work of art reflects events in history and/or culture.~~

~~Goal 1.2: Discuss the interconnections between visual arts and societies.~~

~~Objective(s): By the end of Grade 5, the student will be able to:~~

- ~~4-5.VA.1.2.1 Classify the ways in which ideas and subject matter of arts disciplines are related.~~
- ~~4-5.VA.1.2.2 Describe how elements of various arts depict ideas and emotions.~~

~~Standard 2: Critical Thinking~~

~~Students understand the purposes and functions of the arts. They build literacy and develop critical thinking through analysis and interpretation.~~

~~Students in grades 4-5 use appropriate arts vocabulary to discuss works of art. Students respond to the visual arts as a form of communication, using the elements, materials, techniques, and processes of art. Students construct meaning based on elements found in a work of art. Students identify personal preference for works of art.~~

~~Goal 2.1: Conduct analyses in the visual arts.~~

~~Objective(s): By the end of Grade 5, the student will be able to:~~

- ~~4-5.VA.2.1.1 Identify and respond to differences between art materials, techniques, and processes.~~
- ~~4-5.VA.2.1.2 Construct meaning based on elements found in a work of art.~~
- ~~4-5.VA.2.1.3 Use appropriate arts vocabulary to discuss a variety of art works.~~

~~4-5.VA.2.1.4 Discuss how symbols, subject, and themes create meaning in art.~~
~~4-5.VA.2.1.5 Identify elements (line, shape, form, value, texture, color, space) in artworks and environments.~~

~~Goal 2.2: Exercise sound reasoning and understanding in making choices in the visual arts.~~

~~Objective(s): By the end of Grade 5, the student will be able to:~~
~~4-5.VA.2.2.1 Observe and describe the presence of the visual arts in today's society.~~
~~4-5.VA.2.2.2 Discuss how an artwork's properties (e.g., elements, media, technique) can elicit different responses.~~
~~4-5.VA.2.2.3 Identify personal preference as one of many criteria used to determine excellence in works of art.~~
~~4-5.VA.2.2.4 Identify and demonstrate appropriate behavior when attending and/or participating in arts events.~~
~~4-5.VA.2.2.5 Show respect for personal work and works of others.~~
~~4-5.VA.2.2.6 Write an artist's statement (what the picture depicts and why and how the work was created).~~

~~Standard 3: Performance~~

~~Students engage in the creation of original works and/or the interpretation of works of others, culminating in a performance or presentation.~~

~~Students in grades 4-5 purposefully and appropriately use art techniques, media, and processes to apply the elements in artwork. Students render objects and subject matter from life and communicate ideas from personal experience and other curricular disciplines. Students use the creative process to create works of art. Students write artist's statements.~~

~~Goal 3.1: Demonstrate skills essential to the visual arts. Objective(s): By~~

~~the end of Grade 5, the student will be able to:~~
~~4-5.VA.3.1.1 Acquire skills necessary for using arts techniques, media, and processes.~~
~~4-5.VA.3.1.2 Demonstrate safe and proper use, care, and storage of media, materials, and equipment.~~
~~4-5.VA.3.1.3 Apply the elements of color, shape, line, value, form, texture, and space in artwork.~~
~~4-5.VA.3.1.4 Demonstrate skills of observation through rendering of objects and subject matter from life.~~

~~Goal 3.2: Communicate through the visual arts, applying artistic concepts, knowledge, and skills.~~

~~Objective(s): By the end of Grade 5, the student will be able to:~~
~~4-5.VA.3.2.1 Demonstrate how different media, techniques, and processes are used to communicate ideas.~~
~~4-5.VA.3.2.2 Experiment with ways in which subject matter, symbols, and ideas are used to communicate meaning.~~

~~4-5.VA.3.2.3 Replicate or imitate an existing work, respecting the intent of its original creator.~~

~~Goal 3.3: Communicate through the visual arts with creative expression. Objective(s): By the end of Grade 5, the student will be able to:~~

~~4-5.VA.3.3.1 Experiment with different materials, techniques, and processes in the visual arts.~~
~~4-5.VA.3.3.2 Create a work of art based on personal experience, and/or emotional response.~~
~~4-5.VA.3.3.3 Use the creative process (brainstorm, research, rough sketch, final product) to create a work of art.~~

~~IDAHO CONTENT STANDARDS~~
~~GRADE 6-8~~
~~HUMANITIES: VISUAL ARTS~~

~~Students are expected to know content and apply skills from previous grades.~~

~~Standard 1: Historical and Cultural Contexts~~

~~Students demonstrate an understanding of how people and cultures are connected across time. Humanities instruction prepares students to work and live as global citizens because of their greater understanding of their own culture and the cultures of others.~~

~~Students in grades 6-8 identify distinguishing characteristics of artists' works and artistic movements. Students analyze the influence of history, geography, and culture on a work of art. Students identify significant works of art and artifacts.~~

~~Goal 1.1: Discuss the historical and cultural contexts of the visual arts. Objective(s): By~~

~~the end of Grade 8, the student will be able to:~~

~~6-8.VA.1.1.1 Identify distinguishing characteristics of style in the work of individual artists and art movements.~~
~~6-8.VA.1.1.2 Identify and compare works of art and artifacts from major periods on a chronological timeline.~~
~~6-8.VA.1.1.3 Analyze the influence of history, geography, and technology of a culture upon a work of art.~~
~~6-8.VA.1.1.4 Analyze the visual arts of different cultures and time periods and compare to one's own culture.~~

~~Goal 1.2: Discuss the interconnections between visual arts and societies. Objective(s): By~~

~~the end of Grade 8, the student will be able to:~~

~~6-8.VA.1.2.1 Identify the role of visual arts in theatre, dance, and musical productions.~~
~~6-8.VA.1.2.2 Understand choices made by artists to create meaning.~~

~~Standard 2: Critical Thinking~~

~~Students understand the purposes and functions of the arts. They build literacy and develop critical thinking through analysis and interpretation.~~

~~Students in grades 6-8 respond works of art, using appropriate arts vocabulary. Students make judgments about various art forms and identify criteria used to determine excellence. Students discuss ethical issues of plagiarism in the visual arts. Students show respect for the production and exhibition of art.~~

~~Goal 2.1: Conduct analyses in the visual arts.~~

~~Objective(s): By the end of Grade 8, the student will be able to:~~

~~6-8.VA.2.1.1 Identify and respond to characteristics and content of various art forms.~~

~~6-8.VA.2.1.2 Construct meaning based on elements and principles found in a work of art.~~
~~6-8.VA.2.1.3 Interpret a variety of art works using appropriate arts vocabulary.~~
~~6-8.VA.2.1.4 Identify symbols, themes and iconography commonly used in selected diverse cultures.~~
~~6-8.VA.2.1.5 Identify and discriminate between types of shape (geometric and organic), colors (primary, secondary, complementary, tints, and shades), lines (characteristics, quality), textures (tactile and visual), space (placement, perspective, overlap, negative, positive, size), balance (symmetrical, asymmetrical, radial), and the use of principles in their work and the works of others.~~

~~**Goal 2.2 Exercise sound reasoning and understanding in making choices in the visual arts.**~~

~~**Objective(s): By the end of Grade 8, the student will be able to:**~~
~~6-8.VA.2.2.1 Investigate the various purposes art plays in society today.~~
~~6-8.VA.2.2.2 Analyze the artist's use of sensory, formal, technical, and expressive properties in a work of art.~~
~~6-8.VA.2.2.3 Determine criteria used in making informed judgments about art.~~
~~6-8.VA.2.2.4 Demonstrate appropriate behavior while attending and/or participating in arts events.~~
~~6-8.VA.2.2.5 Show respect for personal work and works of others.~~
~~6-8.VA.2.2.6 Write an artist's statement (foundational background on the subject and the artist and why the work is important to the artist and what medium was employed to express the work).~~
~~6-8.VA.2.2.7 Discuss dividing lines between imitating a master's style of creation and unfairly "copying" another person's original work.~~
~~6-8.VA.2.2.8 Demonstrate collaborative and interpersonal skills by working productively with others, while creating works of art.~~

~~**Standard 3: Performance**~~

~~Students engage in the creation of original works and/or the interpretation of works of others, culminating in a performance or presentation.~~

~~Students in grades 6-8 select media, technique, and process based on effective attributes. Students demonstrate refined observation skills. Students effectively apply elements and principles to their work. Students draw from multiple sources for subject matter (personal interests, current events, media, and styles) to create original artwork. Students use the creative process as an integral dimension of art production. Students express their intent by writing an artist's statement.~~

~~**Goal 3.1: Demonstrate skills essential to the visual arts. Objective(s): By**~~

~~**the end of Grade 8, the student will be able to:**~~
~~6-8.VA.3.1.1 Identify attributes that make a specific art media, technique, or process effective in communicating an idea.~~

~~6-8.VA.3.1.2 Demonstrate safe and proper use, care, and storage of media, materials, and equipment.~~
~~6-8.VA.3.1.3 Apply elements (line, shape, form, texture, color, and space) and principles (repetition, variety, rhythm, proportion, movement, balance, emphasis) in work that effectively communicates an idea.~~
~~6-8.VA.3.1.4 Produce art that demonstrates refined observation skills from life.~~
~~6-8.VA.3.1.5 Experiment with ideas, techniques, and styles in an artist's sketchbook. 6-8.VA.3.1.6 Critique one's own work with the intention of revision and refinement. 6-8.VA.3.1.7 Locate and use appropriate resources in order to work independently, monitoring one's own understanding and learning needs.~~

~~Goal 3.2: Communicate through the visual arts, applying artistic concepts, knowledge, and skills.~~

~~Objective(s): By the end of Grade 8, the student will be able to:~~
~~6-8.VA.3.2.1 Illustrate how visual structures and functions of art improve communication of one's ideas.~~
~~6-8.VA.3.2.2 Demonstrate the ability to utilize personal interest, current events, media or techniques as sources for expanding artwork.~~
~~6-8.VA.3.2.3 Create an original artwork that illustrates the influence of a specific artist or artistic style.~~
~~6-8.VA.3.2.4 Use visual, spatial, and temporal concepts to communicate meaning in a work of art.~~
~~6-8.VA.3.2.5 Create two pieces that depict a common theme, idea, or style of art.~~

~~Goal 3.3: Communicate through the visual arts with creative expression. Objective(s): By~~

~~the end of Grade 8, the student will be able to:~~
~~6-8.VA.3.3.1 Utilize different media, techniques, and processes in the visual arts.~~
~~6-8.VA.3.3.2 Create a work of art that expresses personal experience, opinions, and/or beliefs.~~
~~6-8.VA.3.3.3 Use the creative process (brainstorm, research, rough sketch, final product) to create a work of art.~~
~~6-8.VA.3.3.4 Describe and plan the visual presentation of an artistic work.~~

~~IDAHO CONTENT STANDARDS~~
~~GRADE 9-12~~
~~HUMANITIES: VISUAL ARTS~~

~~Students are expected to know content and apply skills from previous grades.~~

~~Standard 1: Historical and Cultural Contexts~~

~~Students demonstrate an understanding of how people and cultures are connected across time. Humanities instruction prepares students to work and live as global citizens because of their greater understanding of their own culture and the cultures of others.~~

~~Students in grades 9-12 assess the impact of history, society, and the environment upon works of art. Students analyze meaning through identifying cultural symbols and icons. Students compare major periods and movements in visual art to other disciplines in the arts and humanities.~~

~~Goal 1.1: Discuss the historical and cultural contexts of the visual arts. Objective(s): By~~

~~the end of high school, the student will be able to:~~

~~9-12.VA.1.1.1 Identify representative visual works of art from a variety of cultures and historical periods.~~
~~9-12.VA.1.1.2 Outline the history and function of a particular visual art form.~~
~~9-12.VA.1.1.3 Compare and contrast the historical, social, and environmental contexts that influence artistic expression.~~
~~9-12.VA.1.1.4 Compare and contrast aesthetics from different cultural perspectives.~~

~~Goal 1.2: Discuss the interconnections between visual arts and societies.~~

~~Objective(s): By the end of high school, the student will be able to:~~

~~9-12.VA.1.2.1 Compare art forms that share common characteristics (e.g. form, line, space).~~
~~9-12.VA.1.2.2 Analyze a visual art product or art performance that integrates media, processes, and/or concepts from other performing arts disciplines.~~
~~9-12.VA.1.2.3 Relate the trends and movements in visual art to other disciplines in the arts and humanities.~~

~~Standard 2: Critical Thinking~~

~~Students understand the purposes and functions of the arts. They build literacy and develop critical thinking through analysis and interpretation.~~

~~Students in grades 9-12 critique works of art using well-articulated rationale and appropriate arts vocabulary. Students analyze an artist's use of elements and principles in a work of art. Students identify the role of art and artists in today's society. Students discuss the nature of aesthetics and debate ethical issues pertaining to art.~~

~~**Goal 2.1: Conduct analyses in the visual arts.**~~

~~**Objective(s): By the end of high school, the student will be able to:**~~

- ~~9-12.VA.2.1.1 Develop and present basic analyses of works of visual art from structural, historical, and cultural perspectives.~~
- ~~9-12.VA.2.1.2 Construct meaning and support well-developed interpretations of works of art with evidence.~~
- ~~9-12.VA.2.1.3 Critique works of art employing appropriate arts vocabulary.~~
- ~~9-12.VA.2.1.4 Identify iconography in an artist's work or a body of work and analyze the meaning.~~
- ~~9-12.VA.2.1.5 Analyze an artist's use of the elements and principles, and how they contribute to one's interpretation of the artwork.~~

~~**Goal 2.2: Exercise sound reasoning and understanding in making choices in the visual arts.**~~

~~**Objective(s): By the end of high school, the student will be able to:**~~

- ~~9-12.VA.2.2.1 Identify the role of the arts in today's society, including career and avocation opportunities.~~
- ~~9-12.VA.2.2.2 Discuss the nature of art or aesthetic issues.~~
- ~~9-12.VA.2.2.3 Articulate criteria for determining excellence in artwork.~~
- ~~9-12.VA.2.2.4 Demonstrate appropriate behavior while attending and/or participating in arts events.~~
- ~~9-12.VA.2.2.5 Show respect for personal work and work of others.~~
- ~~9-12.VA.2.2.6 Write an artist's statement that describes a series of works (background information on the artist, artists and movements that were influential on the work, significance of the work).~~
- ~~9-12.VA.2.2.7 Debate dividing lines between imitating a master's style of creation and unfairly "copying" another person's original work.~~
- ~~9-12.VA.2.2.8 Demonstrate collaborative and interpersonal skills by working productively with others, while producing works of art.~~

~~**Standard 3: Performance**~~

~~Students engage in the creation of original works and/or the interpretation of works of others, culminating in a performance or presentation.~~

~~Students in grades 9-12 select appropriate media and apply artistic techniques and processes with confidence and intention. Students use elements and principles to solve visual arts problems. Students demonstrate well-developed observational skills. Students clearly communicate personal statements, ideas, or themes through a body of artwork and an accompanying artist's statement. Students use the creative process and a personal sketchbook to plan and create a body of work. Students critique their own artwork and the work of others with the purpose of improving it.~~

~~Goal 3.1: Demonstrate skills essential to the visual arts.~~

~~Objective(s): By the end of high school, the student will be able to:~~

- ~~9-12.VA.3.1.1 Select and apply media, techniques, and processes effectively and with artistic intention.~~
- ~~9-12.VA.3.1.2 Demonstrate safe and proper use, care, and storage of media, materials, and equipment.~~
- ~~9-12.VA.3.1.3 Demonstrate how the elements and principles can be used to solve specific visual arts problems.~~
- ~~9-12.VA.3.1.4 Present convincing or accurately rendered subjects that demonstrate refined observational skills.~~
- ~~9-12.VA.3.1.5 Plan, record, and analyze a body of work through keeping an artist's journal or sketchbook.~~
- ~~9-12.VA.3.1.6 Critique one's own work with the intent of revision and or refinement.~~
- ~~9-12.VA.3.1.7 Locate and use appropriate resources in order to work independently, monitoring one's own understanding and learning needs.~~

~~Goal 3.2: Communicate through the visual arts, applying artistic concepts, knowledge, and skills.~~

~~Objective(s): By the end of high school, the student will be able to:~~

- ~~9-12.VA.3.2.1 Choose purposefully between visual characteristics of a variety of media and use these to communicate one's own idea.~~
- ~~9-12.VA.3.2.2 Discriminate and select from a variety of symbols, subject matter, and ideas to communicate clearly personal statements.~~
- ~~9-12.VA.3.2.3 Create an interpretation of a work respecting the intent of its creator.~~
- ~~9-12.VA.3.2.4 Select and utilize visual, spatial, and temporal concepts to enhance meaning in artwork.~~
- ~~9-12.VA.3.2.5 Create a body of work that develops a specific theme, idea, or style of art.~~

~~Goal 3.3: Communicate through the visual arts with creative expression.~~

~~Objective(s): By the end of high school, the student will be able to:~~

- ~~9-12.VA.3.3.1 Plan and produce a work of art applying media, techniques, and processes with skill, confidence, and sensitivity.~~
- ~~9-12.VA.3.3.2 Apply various symbols, subjects, and ideas in one's artwork.~~
- ~~9-12.VA.3.3.3 Use the creative process (brainstorm, research, rough sketch, final product) to create and critique a work of art.~~
- ~~9-12.VA.3.3.4 Determine and execute appropriate visual presentation of an original artwork.~~

IDAHO
STATE DEPARTMENT OF EDUCATION

ARTS AND HUMANITIES

VISUAL ARTS

Approved by the Idaho State Board of Education, August 11, 2016

K-3 Visual Arts

Visual Arts/Creating
#VA:Cr1.1
Process Component: Investigate, Plan, Make
Anchor Standard: Generate and conceptualize artistic ideas and work.
Enduring Understanding: Creativity and innovative thinking are essential life skills that can be developed.
Essential Question: What conditions, attitudes, and behaviors support creativity and innovative thinking? What factors prevent or encourage people to take creative risks? How does collaboration expand the creative process?

Grade K
VA:Cr1.1.K
Engage in exploration and imaginative play with materials.

Grade 1
VA:Cr1.1.1
Engage collaboratively in exploration and imaginative play with materials.

Grade 2
VA:Cr1.1.2
Brainstorm collaboratively multiple approaches to an art or design problem.

Grade 3
VA:Cr1.1.3
Elaborate on an imaginative idea.

Visual Arts/Creating
#VA:Cr1.2
Process Component: Investigate, Plan, Make
Anchor Standard: Generate and conceptualize artistic ideas and work.
Enduring Understanding: Artists and designers shape artistic investigations, following or breaking with traditions in pursuit of creative artmaking goals.
Essential Question: How does knowing the contexts histories, & traditions of art forms help us create works of art & design? Why do artists follow or break from established traditions? How do artists determine what resources are needed to formulate artistic investigations.

Grade K
VA:Cr1.2.K
Engage collaboratively in creative art-making in response to an artistic problem.

Grade 1
VA:Cr1.2.1
Use observation and investigation in preparation for making a work of art.

Grade 2
VA:Cr1.2.2
Make art or design with various materials and tools to explore personal interests, questions, and curiosity.

Grade 3
VA:Cr1.2.3
Apply knowledge of available resources, tools, and technologies to investigate personal ideas through the art-making process.

Visual Arts/Creating
#VA:Cr2.1
Process Component: Investigate
Anchor Standard: Organize and develop artistic ideas and work.
Enduring Understanding: Artists and designers experiment with forms, structures, materials, concepts, media, and art-making approaches.
Essential Question: How do artists work? How do artists and designers determine whether a particular direction in their work is effective? How do artists and designers learn from trial and error?

Grade K
VA:Cr2.1.K
Through experimentation, build skills in various media and approaches to art-making.

Grade 1
VA:Cr2.1.1
Explore uses of materials and tools to create works of art or design.

Grade 2
VA:Cr2.1.2
Experiment with various materials and tools to explore personal interests in a work of art or design.

Grade 3
VA:Cr2.1.3
Create personally satisfying artwork using a variety of artistic processes and materials.

Visual Arts/Creating
#VA:Cr2.2
Process Component: Investigate
Anchor Standard: Organize and develop artistic ideas and work.
Enduring Understanding: Artists and designers balance experimentation and safety, freedom and responsibility while developing and creating artworks.
Essential Question: How do artists and designers care for & maintain materials, tools, & equipment? Why is it important for safety & health to understand & follow correct procedures in handling materials & tools? What responsibilities come with the freedom to create?

Grade K
VA:Cr2.2.K
Identify safe and non-toxic art materials, tools, and equipment.

Grade 1
VA:Cr2.2.1
Demonstrate safe and proper procedures for using materials, tools, and equipment while making art.

Grade 2
VA:Cr2.2.2
Demonstrate safe procedures for using and cleaning art tools, equipment, and studio spaces.

Grade 3
VA:Cr2.2.3
Demonstrate an understanding of the safe and proficient use of materials, tools, and equipment for a variety of artistic processes.

Visual Arts/Creating
#VA:Cr2.3
Process Component: Investigate
Anchor Standard: Organize and develop artistic ideas and work.
Enduring Understanding: People create and interact with objects, places, and design that define, shape, enhance, and empower their lives.
Essential Question: How do objects, places, and design shape lives and communities? How do artists and designers determine goals for designing or redesigning objects, places, or systems? How do artists and designers create works of art or design that effectively communicate?

Grade K
VA:Cr2.3.K
Create art that represents natural and constructed environments.

Grade 1
VA:Cr2.3.1
Identify and classify uses of everyday objects through drawings, diagrams, sculptures, or other visual means.

Grade 2
VA:Cr2.3.2
Repurpose objects to make something new.

Grade 3
VA:Cr2.3.3
Individually or collaboratively construct representations, diagrams, or maps of places that are part of everyday life.

Visual Arts/Creating
#VA:Cr3.1
Process Component: Reflect, Refine, Continue
Anchor Standard: Refine and complete artistic work.
Enduring Understanding: Artist and designers develop excellence through practice and constructive critique, reflecting on, revising, and refining work over time.
Essential Question: What role does persistence play in revising, refining, and developing work? How do artists grow and become accomplished in art forms? How does collaboratively reflecting on a work help us experience it more completely?

Grade K
VA:Cr3.1.K
Explain the process of making art while creating.

Grade 1
VA:Cr3.1.1
Use art vocabulary to describe choices while creating art.

Grade 2
VA:Cr3.1.2
Discuss and reflect with peers about choices made in creating artwork.

Grade 3
VA:Cr3.1.3
Elaborate visual information by adding details in an artwork to enhance emerging meaning.

Visual Arts/Presenting
#VA:Pr.4.1
Process Component: Relate
Anchor Standard: Select, analyze and interpret artistic work for presentation.
Enduring Understanding: Artists and other presenters consider various techniques, methods, venues, and criteria when analyzing, selecting, and curating objects artifacts, and artworks for preservation and presentation.
Essential Question: How are artworks cared for and by whom? What criteria, methods, and processes are used to select work for preservation or presentation? Why do people value objects, artifacts, and artworks, and select them for presentation?

Grade K
VA:Pr.4.1.K
Select art objects for personal portfolio and display, explaining why they were chosen.

Grade 1
VA:Pr.4.1.1
Explain why some objects, artifacts, and artwork are valued over others.

Grade 2
VA:Pr.4.1.2
Categorize artwork based on a theme or concept for an exhibit.

Grade 3
VA:Pr.4.1.3
Investigate and discuss possibilities and limitations of spaces, including electronic, for exhibiting artwork.

Visual Arts/Presenting
#VA:Pr5.1
Process Component: Select

Anchor Standard: Develop and refine artistic techniques and work for presentation.
Enduring Understanding: Artists, curators and others consider a variety of factors and methods including evolving technologies when preparing and refining artwork for display and or when deciding if and how to preserve and protect it.
Essential Question: What methods and processes are considered when preparing artwork for presentation or preservation? How does refining artwork affect its meaning to the viewer? What criteria are considered when selecting work for presentation, a portfolio, or a collection?

Grade K
VA:Pr5.1.K
Explain the purpose of a portfolio or collection.

Grade 1
VA:Pr5.1.1
Ask and answer questions such as where, when, why, and how artwork should be prepared for presentation or preservation.

Grade 2
VA:Pr5.1.2
Distinguish between different materials or artistic techniques for preparing artwork for presentation.

Grade 3
VA:Pr5.1.3
Identify exhibit space and prepare works of art including artists' statements, for presentation.

Visual Arts/Presenting
#VA:Pr6.1
Process Component: Analyze
Anchor Standard: Convey meaning through the presentation of artistic work.
Enduring Understanding: Objects, artifacts, and artworks collected, preserved, or presented either by artists, museums, or other venues communicate meaning and a record of social, cultural, and political experiences resulting in the cultivating of appreciation and understanding.
Essential Question: What is an art museum? How does the presenting & sharing of objects, artifacts, & artworks influence & shape ideas, beliefs, & experiences? How do objects, artifacts, & artworks collected, preserved, or presented, cultivate appreciation & understanding?

Grade K
VA:Pr6.1.K
Explain what an art museum is and distinguish how an art museum is different from other buildings.

Grade 1
VA:Pr6.1.1
Identify the roles and responsibilities of people who work in and visit museums and other art venues.

Grade 2
VA:Pr6.1.2
Analyze how art exhibited inside and outside of schools (e.g., museums, galleries, virtual spaces, and other venues) contributes to communities.

Grade 3
VA:Pr6.1.3
Identify and explain how and where different cultures record and illustrate stories and history of life through art.

Visual Arts/Responding
#VA:Re7.1
Process Component: Share
Anchor Standard: Perceive and analyze artistic work.
Enduring Understanding: Individual aesthetic and empathetic awareness developed through engagement with art can lead to understanding and appreciation of self, others, the natural world, and constructed environments.
Essential Question: How do life experiences influence the way you relate to art? How does learning about art impact how we perceive the world? What can we learn from our responses to art?

Grade K
VA:Re7.1.K
Identify uses of art within one's personal environment.

Grade 1
VA:Re7.1.1
Select and describe works of art that illustrate daily life experiences of one's self and others.

Grade 2
VA:Re7.1.2
Perceive and describe aesthetic characteristics of one's natural world and constructed environments.

Grade 3
VA:Re7.1.3
Speculate about processes an artist uses to create a work of art.

Visual Arts/Responding
#VA:Re7.2
Process Component: Perceive
Anchor Standard: Perceive and analyze artistic work.
Enduring Understanding: Visual imagery influences understanding of and responses to the world.
Essential Question: What is an image? Where and how do we encounter images in our world? How do images influence our views of the world?

Grade K
VA:Re7.2.K
Describe what an image represents.

Grade 1
VA:Re7.2.1
Compare images that represent the same subject.

Grade 2
VA:Re7.2.2
Categorize images based on expressive properties.

Grade 3
VA:Re7.2.3
Determine messages communicated by an image.

Visual Arts/Responding
#VA:Re8.1
Process Component: Perceive
Anchor Standard: Interpret intent and meaning in artistic work.
Enduring Understanding: People gain insights into meanings of artworks by engaging in the process of art criticism.
Essential Question: What is the value of engaging in the process of art criticism? How can the viewer "read" a work of art as text? How does knowing and using visual art vocabularies help us understand and interpret works of art?

Grade K
VA:Re8.1.K
Interpret art by identifying subject matter and describing relevant details.

Grade 1
VA:Re8.1.1
Interpret art by categorizing subject matter and identifying the characteristics of form.

Grade 2
VA:Re8.1.2
Interpret art by identifying the mood suggested by a work of art and describing relevant subject matter and characteristics of form.

Grade 3
VA:Re8.1.3
Interpret art by analyzing use of media to create subject matter, characteristics of form, and mood.

Visual Arts/Responding
#VA:Re9.1
Process Component: Analyze
Anchor Standard: Apply criteria to evaluate artistic work.
Enduring Understanding: People evaluate art based on various criteria.
Essential Question: How does one determine criteria to evaluate a work of art? How and why might criteria vary? How is a personal preference different from an evaluation?

Grade K
VA:Re9.1.K
Explain reasons for selecting a preferred artwork.

Grade 1

VA:Re9.1.1
Classify artwork based on different reasons for preferences.

Grade 2
VA:Re9.1.2
Use learned art vocabulary to express preferences about artwork.

Grade 3
VA:Re9.1.3
Evaluate an artwork based on given criteria.

Visual Arts/Connecting
#VA:Cn10.1
Process Component: Interpret
Anchor Standard: Synthesize and relate knowledge and personal experiences to make art.
Enduring Understanding: Through art-making, people make meaning by investigating and developing awareness of perceptions, knowledge, and experiences.
Essential Question: How does engaging in creating art enrich people's lives? How does making art attune people to their surroundings? How do people contribute to awareness and understanding of their lives and the lives of their communities through art-making?

Grade K
VA:Cn10.1.K
Create art that tells a story about a life experience.

Grade 1
VA:Cn10.1.1
Identify times, places, and reasons by which students make art outside of school.

Grade 2
VA:Cn10.1.2
Create works of art about events in home, school, or community life.

Grade 3
VA:Cn10.1.3
Develop a work of art based on observations of surroundings.

Visual Arts/Connecting
#VA:Cn11.1
Process Component: Synthesize
Anchor Standard: Relate artistic ideas and works with societal, cultural, and historical context to deepen understanding.
Enduring Understanding: People develop ideas and understandings of society, culture, and history through their interactions with and analysis of art.
Essential Question: How does art help us understand the lives of people of different times, places, and cultures? How is art used to impact the views of a society? How does art preserve aspects of life?

Grade K

VA:Cn11.1.K
Identify a purpose of an artwork.

Grade 1
VA:Cn11.1.1
Understand that people from different places and times have made art for a variety of reasons.

Grade 2
VA:Cn11.1.2
Compare and contrast cultural uses of artwork from different times and places.

Grade 3
VA:Cn11.1.3
Recognize that responses to art change depending on knowledge of the time and place in which it was made.

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4-5 Visual Arts

Visual Arts/Creating
#VA:Cr1.1
Process Component: Investigate, Plan, Make
Anchor Standard: Generate and conceptualize artistic ideas and work.
Enduring Understanding: Creativity and innovative thinking are essential life skills that can be developed.
Essential Question: What conditions, attitudes, and behaviors support creativity and innovative thinking? What factors prevent or encourage people to take creative risks? How does collaboration expand the creative process?

Grade 4
VA:Cr1.1.4
Brainstorm multiple approaches to a creative art or design problem.

Grade 5
VA:Cr1.1.5
Combine ideas to generate an innovative idea for art-making.

Visual Arts/Creating
#VA:Cr1.2
Process Component: Investigate, Plan, Make
Anchor Standard: Generate and conceptualize artistic ideas and work.
Enduring Understanding: Artists and designers shape artistic investigations, following or breaking with traditions in pursuit of creative artmaking goals.
Essential Question: How does knowing the contexts histories, & traditions of art forms help us create works of art & design? Why do artists follow or break from established traditions? How do artists determine what resources are needed to formulate artistic investigations.

Grade 4
VA:Cr1.2.4
Collaboratively set goals and create artwork that is meaningful and has purpose to the makers.

Grade 5
VA:Cr1.2.5
Identify and demonstrate diverse methods of artistic investigation to choose an approach for beginning a work of art.

Visual Arts/Creating
#VA:Cr2.1
Process Component: Investigate
Anchor Standard: Organize and develop artistic ideas and work.
Enduring Understanding: Artists and designers experiment with forms, structures, materials, concepts, media, and art-making approaches.
Essential Question: How do artists work? How do artists and designers determine whether a particular direction in their work is effective? How do artists and designers learn from trial and error?

Grade 4
VA:Cr2.1.4
Explore and invent art-making techniques and approaches.

Grade 5
VA:Cr2.1.5
Experiment and develop skills in multiple art-making techniques and approaches through practice.

Visual Arts/Creating
#VA:Cr2.2
Process Component: Investigate
Anchor Standard: Organize and develop artistic ideas and work.
Enduring Understanding: Artists and designers balance experimentation and safety, freedom and responsibility while developing and creating artworks.
Essential Question: How do artists and designers care for & maintain materials, tools, & equipment? Why is it important for safety & health to understand & follow correct procedures in handling materials & tools? What responsibilities come with the freedom to create?

Grade 4
VA:Cr2.2.4
When making works of art, utilize and care for materials, tools, and equipment in a manner that prevents danger to oneself and others.

Grade 5
VA:Cr2.2.5
Demonstrate quality craftsmanship through care for and use of materials, tools, and equipment.

Visual Arts/Creating
#VA:Cr2.3
Process Component: Investigate
Anchor Standard: Organize and develop artistic ideas and work.
Enduring Understanding: People create and interact with objects, places, and design that define, shape, enhance, and empower their lives.
Essential Question: How do objects, places, and design shape lives and communities? How do artists and designers determine goals for designing or redesigning objects, places, or systems? How do artists and designers create works of art or design that effectively communicate?

Grade 4
VA:Cr2.3.4
Document, describe, and represent regional constructed environments.

Grade 5
VA:Cr2.3.5
Identify, describe, and visually document places and/or objects of personal significance.

Visual Arts/Creating

#VA:Cr3.1
Process Component: Reflect, Refine, Continue
Anchor Standard: Refine and complete artistic work.
Enduring Understanding: Artist and designers develop excellence through practice and constructive critique, reflecting on, revising, and refining work over time.
Essential Question: What role does persistence play in revising, refining, and developing work? How do artists grow and become accomplished in art forms? How does collaboratively reflecting on a work help us experience it more completely?

Grade 4
VA:Cr3.1.4
Revise artwork in progress on the basis of insights gained through peer discussion.

Grade 5
VA:Cr3.1.5
Create artist statements using art vocabulary to describe personal choices in art-making.

Visual Arts/Presenting
#VA:Pr.4.1
Process Component: Relate
Anchor Standard: Select, analyze and interpret artistic work for presentation.
Enduring Understanding: Artists and other presenters consider various techniques, methods, venues, and criteria when analyzing, selecting, and curating objects artifacts, and artworks for preservation and presentation.
Essential Question: How are artworks cared for and by whom? What criteria, methods, and processes are used to select work for preservation or presentation? Why do people value objects, artifacts, and artworks, and select them for presentation?

Grade 4
VA:Pr.4.1.4
Analyze how past, present, and emerging technologies have impacted the preservation and presentation of artwork.

Grade 5
VA:Pr.4.1.5
Define the roles and responsibilities of a curator, explaining the skills and knowledge needed in preserving, maintaining, and presenting objects, artifacts, and artwork.

Visual Arts/Presenting
#VA:Pr5.1
Process Component: Select
Anchor Standard: Develop and refine artistic techniques and work for presentation.
Enduring Understanding: Artists, curators and others consider a variety of factors and methods including evolving technologies when preparing and refining artwork for display and or when deciding if and how to preserve and protect it.
Essential Question: What methods and processes are considered when preparing artwork for presentation or preservation? How does refining artwork affect its meaning to the viewer? What criteria are considered when selecting work for presentation, a portfolio, or a collection?

Grade 4
VA:Pr5.1.4
Analyze the various considerations for presenting and protecting art in various locations, indoor or outdoor settings, in temporary or permanent forms, and in physical or digital formats.

Grade 5
VA:Pr5.1.5
Develop a logical argument for safe and effective use of materials and techniques for preparing and presenting artwork.

Visual Arts/Presenting
#VA:Pr6.1
Process Component: Analyze
Anchor Standard: Convey meaning through the presentation of artistic work.
Enduring Understanding: Objects, artifacts, and artworks collected, preserved, or presented either by artists, museums, or other venues communicate meaning and a record of social, cultural, and political experiences resulting in the cultivating of appreciation and understanding.
Essential Question: What is an art museum? How does the presenting & sharing of objects, artifacts, & artworks influence & shape ideas, beliefs, & experiences? How do objects, artifacts, & artworks collected, preserved, or presented, cultivate appreciation & understanding?

Grade 4
VA:Pr6.1.4
Compare and contrast purposes of art museums, art galleries, and other venues, as well as the types of personal experiences they provide.

Grade 5
VA:Pr6.1.5
Cite evidence about how an exhibition in a museum or other venue presents ideas and provides information about a specific concept or topic.

Visual Arts/Responding
#VA:Re7.1
Process Component: Share
Anchor Standard: Perceive and analyze artistic work.
Enduring Understanding: Individual aesthetic and empathetic awareness developed through engagement with art can lead to understanding and appreciation of self, others, the natural world, and constructed environments.
Essential Question: How do life experiences influence the way you relate to art? How does learning about art impact how we perceive the world? What can we learn from our responses to art?

Grade 4
VA:Re7.1.4
Compare responses to a work of art before and after working in similar media.

Grade 5
VA:Re7.1.5

Compare one's own interpretation of a work of art with the interpretation of others.

Visual Arts/Responding
#VA:Re7.2
Process Component: Perceive
Anchor Standard: Perceive and analyze artistic work.
Enduring Understanding: Visual imagery influences understanding of and responses to the world.
Essential Question: What is an image? Where and how do we encounter images in our world? How do images influence our views of the world?

Grade 4
VA:Re7.2.4
Analyze components in visual imagery that convey messages.

Grade 5
VA:Re7.2.5
Identify and analyze cultural associations suggested by visual imagery.

Visual Arts/Responding
#VA:Re8.1
Process Component: Perceive
Anchor Standard: Interpret intent and meaning in artistic work.
Enduring Understanding: People gain insights into meanings of artworks by engaging in the process of art criticism.
Essential Question: What is the value of engaging in the process of art criticism? How can the viewer "read" a work of art as text? How does knowing and using visual art vocabularies help us understand and interpret works of art?

Grade 4
VA:Re8.1.4
Interpret art by referring to contextual information and analyzing relevant subject matter, characteristics of form, and use of media.

Grade 5
VA:Re8.1.5
Interpret art by analyzing characteristics of form and structure, contextual information, subject matter, visual elements, and use of media to identify ideas and mood conveyed.

Visual Arts/Responding
#VA:Re9.1
Process Component: Analyze
Anchor Standard: Apply criteria to evaluate artistic work.
Enduring Understanding: People evaluate art based on various criteria.
Essential Question: How does one determine criteria to evaluate a work of art? How and why might criteria vary? How is a personal preference different from an evaluation?

Grade 4

VA:Re9.1.4
Apply one set of criteria to evaluate more than one work of art.

Grade 5
VA:Re9.1.5
Recognize differences in criteria used to evaluate works of art depending on styles, genres, and media as well as historical and cultural contexts.

Visual Arts/Connecting
#VA:Cn10.1
Process Component: Interpret
Anchor Standard: Synthesize and relate knowledge and personal experiences to make art.
Enduring Understanding: Through art-making, people make meaning by investigating and developing awareness of perceptions, knowledge, and experiences.
Essential Question: How does engaging in creating art enrich people's lives? How does making art attune people to their surroundings? How do people contribute to awareness and understanding of their lives and the lives of their communities through art-making?

Grade 4
VA:Cn10.1.4
Create works of art that reflect community cultural traditions.

Grade 5
VA:Cn10.1.5
Apply formal and conceptual vocabularies of art and design to view surroundings in new ways through art-making.

Visual Arts/Connecting
#VA:Cn11.1
Process Component: Synthesize
Anchor Standard: Relate artistic ideas and works with societal, cultural, and historical context to deepen understanding.
Enduring Understanding: People develop ideas and understandings of society, culture, and history through their interactions with and analysis of art.
Essential Question: How does art help us understand the lives of people of different times, places, and cultures? How is art used to impact the views of a society? How does art preserve aspects of life?

Grade 4
VA:Cn11.1.4
Through observation, infer information about time, place, and culture in which a work of art was created.

Grade 5
VA:Cn11.1.5
Identify how art is used to inform or change beliefs, values, or behaviors of an individual or society.

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6-8 Visual Arts

Visual Arts/Creating
#VA:Cr1.1
Process Component: Investigate, Plan, Make
Anchor Standard: Generate and conceptualize artistic ideas and work.
Enduring Understanding: Creativity and innovative thinking are essential life skills that can be developed.
Essential Question: What conditions, attitudes, and behaviors support creativity and innovative thinking? What factors prevent or encourage people to take creative risks? How does collaboration expand the creative process?

Grade 6
VA:Cr1.1.6
Combine concepts collaboratively to generate innovative ideas for creating art.

Grade 7
VA:Cr1.1.7
Apply methods to overcome creative blocks.

Grade 8
VA:Cr1.1.8
Document early stages of the creative process visually and/or verbally in traditional or new media.

Visual Arts/Creating
#VA:Cr1.2
Process Component: Investigate, Plan, Make
Anchor Standard: Generate and conceptualize artistic ideas and work.
Enduring Understanding: Artists and designers shape artistic investigations, following or breaking with traditions in pursuit of creative artmaking goals.
Essential Question: How does knowing the contexts histories, & traditions of art forms help us create works of art & design? Why do artists follow or break from established traditions? How do artists determine what resources are needed to formulate artistic investigations.

Grade 6
VA:Cr1.2.6
Formulate an artistic investigation of personally relevant content for creating art.

Grade 7
VA:Cr1.2.7
Develop criteria to guide making a work of art or design to meet an identified goal.

Grade 8
VA:Cr1.2.8
Collaboratively shape an artistic investigation of an aspect of present-day life using a contemporary practice of art and design.

Visual Arts/Creating
#VA:Cr2.1

Process Component: Investigate
Anchor Standard: Organize and develop artistic ideas and work.
Enduring Understanding: Artists and designers experiment with forms, structures, materials, concepts, media, and art-making approaches.
Essential Question: How do artists work? How do artists and designers determine whether a particular direction in their work is effective? How do artists and designers learn from trial and error?

Grade 6
VA:Cr2.1.6
Demonstrate openness in trying new ideas, materials, methods, and approaches in making works of art and design.

Grade 7
VA:Cr2.1.7
Demonstrate persistence in developing skills with various materials, methods, and approaches in creating works of art or design.

Grade 8
VA:Cr2.1.8
Demonstrate willingness to experiment, innovate, and take risks to pursue ideas, forms, and meanings that emerge in the process of art-making or designing.

Visual Arts/Creating
#VA:Cr2.2
Process Component: Investigate
Anchor Standard: Organize and develop artistic ideas and work.
Enduring Understanding: Artists and designers balance experimentation and safety, freedom and responsibility while developing and creating artworks.
Essential Question: How do artists and designers care for & maintain materials, tools, & equipment? Why is it important for safety & health to understand & follow correct procedures in handling materials & tools? What responsibilities come with the freedom to create?

Grade 6
VA:Cr2.2.6
Explain environmental implications of conservation, care, and clean-up of art materials, tools, and equipment.

Grade 7
VA:Cr2.2.7
Demonstrate awareness of ethical responsibility to oneself and others when posting and sharing images and other materials through the Internet, social media, and other communication formats.

Grade 8
VA:Cr2.2.8
Demonstrate awareness of practices, issues, and ethics of appropriation, fair use, copyright, open source, and creative commons as they apply to creating works of art and design.

Visual Arts/Creating

#VA:Cr2.3
Process Component: Investigate
Anchor Standard: Organize and develop artistic ideas and work.
Enduring Understanding: People create and interact with objects, places, and design that define, shape, enhance, and empower their lives.
Essential Question: How do objects, places, and design shape lives and communities? How do artists and designers determine goals for designing or redesigning objects, places, or systems? How do artists and designers create works of art or design that effectively communicate?

Grade 6
VA:Cr2.3.6
Design or redesign objects, places, or systems that meet the identified needs of diverse users.

Grade 7
VA:Cr2.3.7
Apply visual organizational strategies to design and produce a work of art, design, or media that clearly communicates information or ideas.

Grade 8
VA:Cr2.3.8
Select, organize, and design images and words to make visually clear and compelling presentations.

Visual Arts/Creating
#VA:Cr3.1
Process Component: Reflect, Refine, Continue
Anchor Standard: Refine and complete artistic work.
Enduring Understanding: Artist and designers develop excellence through practice and constructive critique, reflecting on, revising, and refining work over time.
Essential Question: What role does persistence play in revising, refining, and developing work? How do artists grow and become accomplished in art forms? How does collaboratively reflecting on a work help us experience it more completely?

Grade 6
VA:Cr3.1.6
Reflect on whether personal artwork conveys the intended meaning and revise accordingly.

Grade 7
VA:Cr3.1.7
Reflect on and explain important information about personal artwork in an artist statement or another format.

Grade 8
VA:Cr3.1.8
Apply relevant criteria to examine, reflect on, and plan revisions for a work of art or design in progress.

Visual Arts/Presenting
#VA:Pr.4.1
Process Component: Relate

Anchor Standard: Select, analyze and interpret artistic work for presentation.
Enduring Understanding: Artists and other presenters consider various techniques, methods, venues, and criteria when analyzing, selecting, and curating objects artifacts, and artworks for preservation and presentation.
Essential Question: How are artworks cared for and by whom? What criteria, methods, and processes are used to select work for preservation or presentation? Why do people value objects, artifacts, and artworks, and select them for presentation?

Grade 6
VA:Pr.4.1.6
Analyze similarities and differences associated with preserving and presenting two-dimensional, three-dimensional, and digital artwork.

Grade 7
VA:Pr.4.1.7
Compare and contrast how technologies have changed the way artwork is preserved, presented, and experienced.

Grade 8
VA:Pr.4.1.8
Develop and apply criteria for evaluating a collection of artwork for presentation.

Visual Arts/Presenting
#VA:Pr5.1
Process Component: Select
Anchor Standard: Develop and refine artistic techniques and work for presentation.
Enduring Understanding: Artists, curators and others consider a variety of factors and methods including evolving technologies when preparing and refining artwork for display and or when deciding if and how to preserve and protect it.
Essential Question: What methods and processes are considered when preparing artwork for presentation or preservation? How does refining artwork affect its meaning to the viewer? What criteria are considered when selecting work for presentation, a portfolio, or a collection?

Grade 6
VA:Pr5.1.6
Individually or collaboratively, develop a visual plan for displaying works of art, analyzing exhibit space, the needs of the viewer, and the layout of the exhibit.

Grade 7
VA:Pr5.1.7
Based on criteria, analyze and evaluate methods for preparing and presenting art.

Grade 8
VA:Pr5.1.8
Collaboratively prepare and present selected theme-based artwork for display, and formulate exhibition narratives for the viewer.

Visual Arts/Presenting

#VA:Pr6.1
Process Component: Analyze
Anchor Standard: Convey meaning through the presentation of artistic work.
Enduring Understanding: Objects, artifacts, and artworks collected, preserved, or presented either by artists, museums, or other venues communicate meaning and a record of social, cultural, and political experiences resulting in the cultivating of appreciation and understanding.
Essential Question: What is an art museum? How does the presenting & sharing of objects, artifacts, & artworks influence & shape ideas, beliefs, & experiences? How do objects, artifacts, & artworks collected, preserved, or presented, cultivate appreciation & understanding?

Grade 6
VA:Pr6.1.6
Assess, explain, and provide evidence of how museums or other venues reflect history and values of a community.

Grade 7
VA:Pr6.1.7
Compare and contrast viewing and experiencing collections and exhibitions in different venues.

Grade 8
VA:Pr6.1.8
Analyze why and how an exhibition or collection may influence ideas, beliefs, and experiences.

Visual Arts/Responding
#VA:Re7.1
Process Component: Share
Anchor Standard: Perceive and analyze artistic work.
Enduring Understanding: Individual aesthetic and empathetic awareness developed through engagement with art can lead to understanding and appreciation of self, others, the natural world, and constructed environments.
Essential Question: How do life experiences influence the way you relate to art? How does learning about art impact how we perceive the world? What can we learn from our responses to art?

Grade 6
VA:Re7.1.6
Identify and interpret works of art or design that reveal how people live around the world and what they value.

Grade 7
VA:Re7.1.7
Explain how the method of display, the location, and the experience of an artwork influence how it is perceived and valued.

Grade 8
VA:Re7.1.8
Explain how a person's aesthetic choices are influenced by culture and environment and impact the visual image that one conveys to others.

Visual Arts/Responding
#VA:Re7.2
Process Component: Perceive
Anchor Standard: Perceive and analyze artistic work.
Enduring Understanding: Visual imagery influences understanding of and responses to the world.
Essential Question: What is an image? Where and how do we encounter images in our world? How do images influence our views of the world?

Grade 6
VA:Re7.2.6
Analyze ways that visual components and cultural associations suggested by images influence ideas, emotions, and actions.

Grade 7
VA:Re7.2.7
Analyze multiple ways that images influence specific audiences.

Grade 8
VA:Re7.2.8
Compare and contrast contexts and media in which viewers encounter images that influence ideas, emotions, and actions.

Visual Arts/Responding
#VA:Re8.1
Process Component: Perceive
Anchor Standard: Interpret intent and meaning in artistic work.
Enduring Understanding: People gain insights into meanings of artworks by engaging in the process of art criticism.
Essential Question: What is the value of engaging in the process of art criticism? How can the viewer "read" a work of art as text? How does knowing and using visual art vocabularies help us understand and interpret works of art?

Grade 6
VA:Re8.1.6
Interpret art by distinguishing between relevant and non-relevant contextual information and analyzing subject matter, characteristics of form and structure, and use of media to identify ideas and mood conveyed.

Grade 7
VA:Re8.1.7
Interpret art by analyzing art-making approaches, the characteristics of form and structure, relevant contextual information, subject matter, and use of media to identify ideas and mood conveyed.

Grade 8
VA:Re8.1.8
Interpret art by analyzing how the interaction of subject matter, characteristics of form and structure, use of media, art-making approaches, and relevant contextual information contributes to understanding messages or ideas and mood conveyed.

Visual Arts/Responding
#VA:Re9.1
Process Component: Analyze
Anchor Standard: Apply criteria to evaluate artistic work.
Enduring Understanding: People evaluate art based on various criteria.
Essential Question: How does one determine criteria to evaluate a work of art? How and why might criteria vary? How is a personal preference different from an evaluation?

Grade 6
VA:Re9.1.6
Develop and apply relevant criteria to evaluate a work of art.

Grade 7
VA:Re9.1.7
Compare and explain the difference between an evaluation of an artwork based on personal criteria and an evaluation of an artwork based on a set of established criteria.

Grade 8
VA:Re9.1.8
Create a convincing and logical argument to support an evaluation of art.

Visual Arts/Connecting
#VA:Cn10.1
Process Component: Interpret
Anchor Standard: Synthesize and relate knowledge and personal experiences to make art.
Enduring Understanding: Through art-making, people make meaning by investigating and developing awareness of perceptions, knowledge, and experiences.
Essential Question: How does engaging in creating art enrich people's lives? How does making art attune people to their surroundings? How do people contribute to awareness and understanding of their lives and the lives of their communities through art-making?

Grade 6
VA:Cn10.1.6
Generate a collection of ideas reflecting current interests and concerns that could be investigated in art-making.

Grade 7
VA:Cn10.1.7
Individually or collaboratively create visual documentation of places and times in which people gather to make and experience art or design in the community.

Grade 8
VA:Cn10.1.8
Make art collaboratively to reflect on and reinforce positive aspects of group identity.

Visual Arts/Connecting
#VA:Cn11.1
Process Component: Synthesize

Anchor Standard: Relate artistic ideas and works with societal, cultural, and historical context to deepen understanding.
Enduring Understanding: People develop ideas and understandings of society, culture, and history through their interactions with and analysis of art.
Essential Question: How does art help us understand the lives of people of different times, places, and cultures? How is art used to impact the views of a society? How does art preserve aspects of life?

Grade 6
VA:Cn11.1.6
Analyze how art reflects changing times, traditions, resources, and cultural uses.

Grade 7
VA:Cn11.1.7
Analyze how response to art is influenced by understanding the time and place in which it was created, the available resources, and cultural uses.

Grade 8
VA:Cn11.1.8
Distinguish different ways art is used to represent, establish, reinforce, and reflect group identity.

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High School Visual Arts

Visual Arts/Creating
#VA:Cr1.1
Process Component: Investigate, Plan, Make
Anchor Standard: Generate and conceptualize artistic ideas and work.
Enduring Understanding: Creativity and innovative thinking are essential life skills that can be developed.
Essential Question: What conditions, attitudes, and behaviors support creativity and innovative thinking? What factors prevent or encourage people to take creative risks? How does collaboration expand the creative process?

HS Proficient
VA:Cr1.1.HSI
Use multiple approaches to begin creative endeavors.

HS Accomplished
VA:Cr1.1.HSII
Individually or collaboratively formulate new creative problems based on student's existing artwork.

HS Advanced
VA:Cr1.1.HSIII
Visualize and hypothesize to generate plans for ideas and directions for creating art and design that can affect social change.

Visual Arts/Creating
#VA:Cr1.2
Process Component: Investigate, Plan, Make
Anchor Standard: Generate and conceptualize artistic ideas and work.
Enduring Understanding: Artists and designers shape artistic investigations, following or breaking with traditions in pursuit of creative artmaking goals.
Essential Question: How does knowing the contexts histories, & traditions of art forms help us create works of art & design? Why do artists follow or break from established traditions? How do artists determine what resources are needed to formulate artistic investigations?

HS Proficient
VA:Cr1.2.HSI
Shape an artistic investigation of an aspect of present-day life using a contemporary practice of art or design.

HS Accomplished
VA:Cr1.2.HSII
Choose from a range of materials and methods of traditional and contemporary artistic practices to plan works of art and design.

HS Advanced
VA:Cr1.2.HSIII
Choose from a range of materials and methods of traditional and contemporary artistic practices, following or breaking established conventions, to plan the making of multiple works of art and design based on a theme, idea, or concept.

Visual Arts/Creating
#VA:Cr2.1
Process Component: Investigate
Anchor Standard: Organize and develop artistic ideas and work.
Enduring Understanding: Artists and designers experiment with forms, structures, materials, concepts, media, and art-making approaches.
Essential Question: How do artists work? How do artists and designers determine whether a particular direction in their work is effective? How do artists and designers learn from trial and error?

HS Proficient
VA:Cr2.1.HSI
Engage in making a work of art or design without having a preconceived plan.

HS Accomplished
VA:Cr2.1.HSII
Through experimentation, practice, and persistence, demonstrate acquisition of skills and knowledge in a chosen art form.

HS Advanced
VA:Cr2.1.HSIII
Experiment, plan, and make multiple works of art and design that explore a personally meaningful theme, idea, or concept.

Visual Arts/Creating
#VA:Cr2.2
Process Component: Investigate
Anchor Standard: Organize and develop artistic ideas and work.
Enduring Understanding: Artists and designers balance experimentation and safety, freedom and responsibility while developing and creating artworks.
Essential Question: How do artists and designers care for & maintain materials, tools, & equipment? Why is it important for safety & health to understand & follow correct procedures in handling materials & tools? What responsibilities come with the freedom to create?

HS Proficient
VA:Cr2.2.HSI
Explain how traditional and non-traditional materials may impact human health and the environment and demonstrate safe handling of materials, tools, and equipment.

HS Accomplished
VA:Cr2.2.HSII
Demonstrate awareness of ethical implications of making and distributing creative work.

HS Advanced
VA:Cr2.2.HSIII
Demonstrate understanding of the importance of balancing freedom and responsibility in the use of images, materials, tools, and equipment in the creation and circulation of creative work.

Visual Arts/Creating
#VA:Cr2.3
Process Component: Investigate
Anchor Standard: Organize and develop artistic ideas and work.
Enduring Understanding: People create and interact with objects, places, and design that define, shape, enhance, and empower their lives.
Essential Question: How do objects, places, and design shape lives and communities? How do artists and designers determine goals for designing or redesigning objects, places, or systems? How do artists and designers create works of art or design that effectively communicate?

HS Proficient
VA:Cr2.3.HSI
Collaboratively develop a proposal for an installation, artwork, or space design that transforms the perception and experience of a particular place.

HS Accomplished
VA:Cr2.3.HSII
Redesign an object, system, place, or design in response to contemporary issues.

HS Advanced
VA:Cr2.3.HSIII
Demonstrate in works of art or design how visual and material culture defines, shapes, enhances, inhibits, and/or empowers people's lives.

Visual Arts/Creating
#VA:Cr3.1
Process Component: Reflect, Refine, Continue
Anchor Standard: Refine and complete artistic work.
Enduring Understanding: Artist and designers develop excellence through practice and constructive critique, reflecting on, revising, and refining work over time.
Essential Question: What role does persistence play in revising, refining, and developing work? How do artists grow and become accomplished in art forms? How does collaboratively reflecting on a work help us experience it more completely?

HS Proficient
VA:Cr3.1.HSI
Apply relevant criteria from traditional and contemporary cultural contexts to examine, reflect on, and plan revisions for works of art and design in progress.

HS Accomplished
VA:Cr3.1.HSII
Engage in constructive critique with peers, then reflect on, re-engage, revise, and refine works of art and design in response to personal artistic vision.

HS Advanced
VA:Cr3.1.HSIII
Reflect on, re-engage, revise, and refine works of art or design considering relevant traditional and contemporary criteria as well as personal artistic vision.

Visual Arts/Presenting
#VA:Pr.4.1
Process Component: Relate
Anchor Standard: Select, analyze and interpret artistic work for presentation.
Enduring Understanding: Artists and other presenters consider various techniques, methods, venues, and criteria when analyzing, selecting, and curating objects artifacts, and artworks for preservation and presentation.
Essential Question: How are artworks cared for and by whom? What criteria, methods, and processes are used to select work for preservation or presentation? Why do people value objects, artifacts, and artworks, and select them for presentation?

HS Proficient
VA:Pr.4.1.HSI
Analyze, select, and curate artifacts and/or artworks for presentation and preservation.

HS Accomplished
VA:Pr.4.1.HSII
Analyze, select, and critique personal artwork for a collection or portfolio presentation.

HS Advanced
VA:Pr.4.1.HSIII
Critique, justify, and present choices in the process of analyzing, selecting, curating, and presenting artwork for a specific exhibit or event.

Visual Arts/Presenting
#VA:Pr5.1
Process Component: Select
Anchor Standard: Develop and refine artistic techniques and work for presentation.
Enduring Understanding: Artists, curators and others consider a variety of factors and methods including evolving technologies when preparing and refining artwork for display and or when deciding if and how to preserve and protect it.
Essential Question: What methods and processes are considered when preparing artwork for presentation or preservation? How does refining artwork affect its meaning to the viewer? What criteria are considered when selecting work for presentation, a portfolio, or a collection?

HS Proficient
VA:Pr5.1.HSI
Analyze and evaluate the reasons and ways an exhibition is presented.

HS Accomplished
VA:Pr5.1.HSII
Evaluate, select, and apply methods or processes appropriate to display artwork in a specific place.

HS Advanced
VA:Pr5.1.HSIII
Investigate, compare, and contrast methods for preserving and protecting art.

Visual Arts/Presenting
#VA:Pr6.1
Process Component: Analyze
Anchor Standard: Convey meaning through the presentation of artistic work.
Enduring Understanding: Objects, artifacts, and artworks collected, preserved, or presented either by artists, museums, or other venues communicate meaning and a record of social, cultural, and political experiences resulting in the cultivating of appreciation and understanding.
Essential Question: What is an art museum? How does the presenting & sharing of objects, artifacts, & artworks influence & shape ideas, beliefs, & experiences? How do objects, artifacts, & artworks collected, preserved, or presented, cultivate appreciation & understanding?

HS Proficient
VA:Pr6.1.HSI
Analyze and describe the impact that an exhibition or collection has on personal awareness of social, cultural, or political beliefs and understandings.

HS Accomplished
VA:Pr6.1.HSII
Make, explain, and justify connections between artists or artwork and social, cultural, and political history.

HS Advanced
VA:Pr6.1.HSIII
Curate a collection of objects, artifacts, or artwork to impact the viewer's understanding of social, cultural, and/or political experiences.

Visual Arts/Responding
#VA:Re7.1
Process Component: Share
Anchor Standard: Perceive and analyze artistic work.
Enduring Understanding: Individual aesthetic and empathetic awareness developed through engagement with art can lead to understanding and appreciation of self, others, the natural world, and constructed environments.
Essential Question: How do life experiences influence the way you relate to art? How does learning about art impact how we perceive the world? What can we learn from our responses to art?

HS Proficient
VA:Re7.1.HSI
Hypothesize ways in which art influences perception and understanding of human experiences.

HS Accomplished
VA:Re7.1.HSII
Recognize and describe personal aesthetic and empathetic responses to the natural world and constructed environments.

HS Advanced
VA:Re7.1.HSIII
Analyze how responses to art develop over time based on knowledge of and experience with art and life.

Visual Arts/Responding
#VA:Re7.2
Process Component: Perceive
Anchor Standard: Perceive and analyze artistic work.
Enduring Understanding: Visual imagery influences understanding of and responses to the world.
Essential Question: What is an image? Where and how do we encounter images in our world? How do images influence our views of the world?

HS Proficient
VA:Re7.2.HSI
Analyze how one's understanding of the world is affected by experiencing visual imagery.

HS Accomplished
VA:Re7.2.HSII
Evaluate the effectiveness of an image or images to influence ideas, feelings, and behaviors of specific audiences.

HS Advanced
VA:Re7.2.HSIII
Determine the commonalities within a group of artists or visual images attributed to a particular type of art, timeframe, or culture.

Visual Arts/Responding
#VA:Re8.1
Process Component: Perceive
Anchor Standard: Interpret intent and meaning in artistic work.
Enduring Understanding: People gain insights into meanings of artworks by engaging in the process of art criticism.
Essential Question: What is the value of engaging in the process of art criticism? How can the viewer "read" a work of art as text? How does knowing and using visual art vocabularies help us understand and interpret works of art?

HS Proficient
VA:Re8.1.HSI
Interpret an artwork or collection of works, supported by relevant and sufficient evidence found in the work and its various contexts.

HS Accomplished
VA:Re8.1.HSII
Identify types of contextual information useful in the process of constructing interpretations of an artwork or collection of works.

HS Advanced
VA:Re8.1.HSIII
Analyze differing interpretations of an artwork or collection of works in order to select and defend a plausible critical analysis.

Visual Arts/Responding
#VA:Re9.1

Process Component: Analyze
Anchor Standard: Apply criteria to evaluate artistic work.
Enduring Understanding: People evaluate art based on various criteria.
Essential Question: How does one determine criteria to evaluate a work of art? How and why might criteria vary? How is a personal preference different from an evaluation?

HS Proficient
VA:Re9.1.HSI
Establish relevant criteria in order to evaluate a work of art or collection of works.

HS Accomplished
VA:Re9.1.HSII
Determine the relevance of criteria used by others to evaluate a work of art or collection of works.

HS Advanced
VA:Re9.1.HSIII
Construct evaluations of a work of art or collection of works based on differing sets of criteria.

Visual Arts/Connecting
#VA:Cn10.1
Process Component: Interpret
Anchor Standard: Synthesize and relate knowledge and personal experiences to make art.
Enduring Understanding: Through art-making, people make meaning by investigating and developing awareness of perceptions, knowledge, and experiences.
Essential Question: How does engaging in creating art enrich people's lives? How does making art attune people to their surroundings? How do people contribute to awareness and understanding of their lives and the lives of their communities through art-making?

HS Proficient
VA:Cn10.1.HSI
Document the process of developing ideas from early stages to fully elaborated ideas.

HS Accomplished
VA:Cn10.1.HSII
Utilize inquiry methods of observation, research, and experimentation to explore unfamiliar subjects through art-making.

HS Advanced
VA:Cn10.1.HSIII
Synthesize knowledge of social, cultural, historical, and personal life with art-making approaches to create meaningful works of art or design.

Visual Arts/Connecting
#VA:Cn11.1
Process Component: Synthesize
Anchor Standard: Relate artistic ideas and works with societal, cultural, and historical context to deepen understanding.

Enduring Understanding: People develop ideas and understandings of society, culture, and history through their interactions with and analysis of art.
Essential Question: How does art help us understand the lives of people of different times, places, and cultures? How is art used to impact the views of a society? How does art preserve aspects of life?

HS Proficient
VA:Cn11.1.HSI
Describe how knowledge of culture, traditions, and history may influence personal responses to art.

HS Accomplished
VA:Cn11.1.HSII
Compare uses of art in a variety of societal, cultural, and historical contexts and make connections to uses of art in contemporary and local contexts.

HS Advanced
VA:Cn11.1.HSIII
Appraise the impact of an artist or a group of artists on the beliefs, values, and behaviors of a society.

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GLOSSARY: VISUAL ARTS

Visual Arts, as defined by the National Art Education Association, include the traditional fine arts such as drawing, painting, printmaking, photography, and sculpture; media arts including film, graphic communications, animation, and emerging technologies; architectural, environmental, and industrial arts such as urban, interior, product, and landscape design; folk arts; and works of art such as ceramics, fibers, jewelry, works in wood, paper, and other materials (Revised July 2012)

Art
In everyday discussions and in the history of aesthetics, multiple (and sometimes contradictory) definitions of art have been proposed. In a classic article, "The Role of Theory in Aesthetics," Morris Weitz (1956) recommended differentiating between classificatory (classifying) and honorific (honoring) definitions of art
In the Next Generation Core Visual Arts Standards, the word art is used in the classificatory sense to mean "an artifact or action that has been put forward by an artist or other person as something to be experienced, interpreted, and appreciated"
An important component of a quality visual arts education is for students to engage in discussions about honorific definitions of art—identifying the wide range of significant features in art-making approaches, analyzing why artists follow or break with traditions and discussing their own understandings of the characteristics of "good art"

Appropriation
Intentional borrowing, copying, and alteration of preexisting images and objects

Artist statement
Information about context, explanations of process, descriptions of learning, related stories, reflections, or other details in a written or spoken format shared by the artist to extend and deepen understanding of his or her artwork; an artist statement can be didactic, descriptive, or reflective in nature

Artistic investigations
In making art, forms of inquiry and exploration; through artistic investigation artists go beyond illustrating pre-existing ideas or following directions, and students generate fresh insights—new ways of seeing and knowing

Art-making approaches
Diverse strategies and procedures by which artists initiate and pursue making a work

Artwork
Artifact or action that has been put forward by an artist or other person as something to be experienced, interpreted, and appreciated

Brainstorm
Technique for the initial production of ideas or ways of solving a problem by an individual or group in which ideas are spontaneously contributed without critical comment or judgment

Characteristic(s)
Attribute, feature, property, or essential quality

Characteristics of form (and structure)
Terms drawn from traditional, modern, and contemporary sources that identify the range of attributes that can be used to describe works of art and design to aid students in experiencing and perceiving the qualities of artworks, enabling them to create their own work and to appreciate and interpret the work of others

Collaboration
Joint effort of working together to formulate and solve creative problems

Collaboratively
Joining with others in attentive participation in an activity of imagining, exploring, and/or making

Concepts
Ideas, thoughts, schemata; art arising out of conceptual experimentation that emphasizes making meaning through ideas rather than through materiality or form

Constructed environment
Human-made or modified spaces and places; art and design-related disciplines such as architecture, urban planning, interior design, game design, virtual environment, and landscape design shape the places in which people live, work, and play

Contemporary artistic practice
Processes, techniques, media, procedures, behaviors, actions, and conceptual approaches by which an artist or designer makes work using methods that, though they may be based on traditional practices, reflect changing contextual, conceptual, aesthetic, material and technical possibilities; examples include artwork made with appropriated images or materials, social practice artworks that involve the audience, performance art, new media works, installations, and artistic interventions in public spaces

Context
Interrelated conditions surrounding the creation and experiencing of an artwork, including the artist, viewer/audiences, time, culture, presentation, and location of the artwork's creation and reception

Copyright
Form of protection grounded in the U.S. Constitution and granted by law for original works of authorship fixed in a tangible medium of expression, covering both published and unpublished works

Creative commons
Copyright license templates that provide a simple, standardized way to give the public permission to share and use creative work on conditions of the maker's choice (http://creativecommons.org/)

Creativity
Ability to conceive and develop rich, original ideas, discover unexpected connections, and invent or make new things

Criteria
In art and design, principles that direct attention to significant aspects of a work and provide guidelines for evaluating its success

Contemporary criteria
Principles by which a work of art or design is understood and evaluated in contemporary contexts which, for example, include judging not necessarily on originality, but rather on how the work is re-contextualized to create new meanings

Established criteria
Identified principles that direct attention to significant aspects of various types of artwork in order to provide guidelines for evaluating the work; these may be commonly accepted principles that have been developed by

artists, curators, historians, critics, educators and others or principles developed by an individual or group to pertain to a specific work of art or design

Personal criteria
Principles for evaluating art and design based on individual preferences

Relevant criteria
Principles that apply to making, revising, understanding, and evaluating a particular work of art or design that are generated by identifying the significant characteristics of a work

Critique
Individual or collective reflective process by which artists or designers experience, analyze, and evaluate a work of art or design

Cultural contexts
Ideas, beliefs, values, norms, customs, traits, practices, and characteristics shared by individuals within a group that form the circumstances surrounding the creation, presentation, preservation, and response to art

Cultural traditions
Pattern of practices and beliefs within a societal group

Curate
Collect, sort, and organize objects, artworks, and artifacts; preserve and maintain historical records and catalogue exhibits

Curator
Person responsible for acquiring, caring for, and exhibiting objects, artworks, and artifacts

Design
Application of creativity to planning the optimal solution to a given problem and communication of that plan to others

Digital format
Anything in electronic form including photos, images, video, audio files, or artwork created or presented through electronic means; a gallery of artwork viewed electronically through any device

Engagement
Attentive participation in an activity of imagining, exploring, and making

Exhibition narrative
Written description of an exhibition intended to educate viewers about its purpose

Expressive properties
Moods, feelings, or ideas evoked or suggested through the attributes, features, or qualities of an image or work of art

Fair use
Limitation in copyright law which sets out factors to be considered in determining whether or not a particular use of one's work is "fair," such as the purpose and character of the use, the amount of the work used, and whether the use will affect the market for the work

Formal and conceptual vocabularies
Terms, methods, concepts, or strategies used to experience, describe, analyze, plan, and make works of art and design drawn from traditional, modern, contemporary, and continually emerging sources in diverse cultures

Genre
Category of art or design identified by similarities in form, subject matter, content, or technique

Image
Visual representation of a person, animal, thing, idea, or concept

Imaginative play
Experimentation by children in defining identities and points of view by developing skills in conceiving, planning, making art, and communicating

Innovative thinking
Imagining or and conceiving something new and unexpected, including fresh ideas and ways of looking at things and new approaches to old problems as well as formulating new problems

Material culture
Human-constructed or human-mediated objects, forms, or expressions, that extend to other senses and study beyond the traditional art historical focus on the exemplary to the study of common objects, ordinary spaces, and every day rituals

Materials
Substances out of which art is made or composed, ranging from the traditional to "non-art" material and virtual, cybernetic, and simulated materials

Medium/Media
Mode(s) of artistic expression or communication; material or other resources used for creating art

Open source
Computer software for which the copyright holder freely provides the right to use, study, change, and distribute the software to anyone for any purpose (http://opensource.org/)

Play
Spontaneous engaged activity through which children learn to experience, experiment, discover, and create

Portfolio
Actual or virtual collection of artworks and documentation demonstrating art and design knowledge and skills organized to reflect an individual's creative growth and artistic literacy

Preservation
Activity of protecting, saving, and caring for objects, artifacts, and artworks through a variety of means

Preserve
Protect, save, and care for (curate) objects, artifacts, and artworks

Style
Recognizable characteristics of art or design that are found consistently in historical periods, cultural traditions, schools of art, or works of an individual artist

Technologies
Tools, techniques, crafts, systems, and methods to shape, adapt, and preserve artworks, artifacts, objects, and natural and human-made environments

Text
That form which information can be gathered, expanding beyond the traditional notion of written language to encompass visual representations such as paintings, sculpture, diagrams, graphics, films, and maps

Venue
Place or setting for an art exhibition, either a physical space or a virtual environment

Visual components
Properties of an image that can be perceived

Visual imagery
Group of images; images in general

Visual organization approaches and strategies
Graphic design strategies such as hierarchy, consistency, grids, spacing, scale, weight, proximity, alignment, and typography choice used to create focus and clarity in a work

Visual plan
Drawing, picture, diagram, or model of the layout of an art exhibit where individual works of art and artifacts are presented along with interpretive materials within a given space or venue

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~~IDAHO CONTENT STANDARDS~~
~~GRADE K-3~~
~~HUMANITIES: DANCE~~

~~Standard 1: Historical and Cultural Contexts~~

~~Students demonstrate an understanding of how people and cultures are connected across time. Humanities instruction prepares students to work and live as global citizens because of their greater understanding of their own culture and the cultures of others.~~

~~Students in grades K-3 demonstrate dance movements associated with places, historical events, and themes across various cultures and disciplines.~~

~~Goal 1.1: Discuss historical and cultural contexts of dance and perform examples.~~

~~Objective(s): By the end of Grade 3, the student will be able to:~~

~~K-3.D.1.1.1 Identify and perform dances associated with particular places and events.~~
~~K-3.D.1.1.2 Discuss common subjects, ideas, and themes in dances from different cultures.~~

~~Goal 1.2: Demonstrate through movement interrelationships among visual and performing arts disciplines.~~

~~Objective(s): By the end of Grade 3, the student will be able to:~~

~~K-3.D.1.2.1 Compare dance and other art forms associated with various cultures in various time periods.~~
~~K-3.D.1.2.2 Identify common ideas found in other art forms and explore them through movement (e.g., students identify the idea of sadness found and improvise the idea through movement using "sad" music).~~

~~Standard 2: Critical Thinking~~

~~Students understand the purposes and functions of the arts. They build literacy and develop critical thinking through analysis and interpretation.~~

~~Students in grades K-3 develop an arts vocabulary and respond through movement and discussion to ideas and themes in dance.~~

~~Goal 2.1: Exercise sound reasoning in understanding and making choices in dance.~~

~~Objective(s): By the end of Grade 3, the student will be able to:~~

~~K-3.D.2.1.1 Talk about dance as a means of communicating emotions (happy sad, angry).~~
~~K-3.D.2.1.2 Develop dance vocabulary when discussing dance.~~
~~K-3.D.2.1.3 Show through movement how the human body is used to express or communicate an action, idea, or experience.~~

~~Goal 2.2: Formulate and express opinions about dance performances.~~

~~Objective(s): By the end of Grade 3, the student will be able to:~~

~~K-3.D.2.2.1 Voice personal preferences about dances within a classroom or other setting.~~
~~K-3.D.2.2.2 Show how dance elicits various interpretations.~~

~~Standard 3: Performance~~

~~Students engage in the creation of original works and/or the interpretation of works of others, culminating in a performance or presentation.~~

~~Students in grades K-3 identify and demonstrate movement qualities, body shapes, levels, pathways, and tempos. Students create and perform movement phrases individually and collectively.~~

~~Goal 3.1: Identify and practice concepts essential to dance.~~

~~Objective(s): By the end of Grade 3, the student will be able to:~~
~~K-3.D.3.1.1 Identify and practice different movement qualities (e.g., rise, fall).~~
~~K-3.D.3.1.2 Demonstrate how the body can change, create shapes, change levels, and move through pathways and in space at various speeds.~~
~~K-3.D.3.1.3 Demonstrate dance phrases, following a specific floor pattern.~~

~~Goal 3.2: Communicate in dance through application of artistic concepts, knowledge, and skills.~~

~~Objective(s): By the end of Grade 3, the student will be able to:~~
~~K-3.D.3.2.1 Repeat demonstrated body movements and rhythm patterns.~~
~~K-3.D.3.2.2 Move as an individual and as part of a group without talking.~~
~~K-3.D.3.2.3 Move at various tempos.~~

~~Goal 3.3: Communicate in dance through creative expression.~~

~~Objective(s): By the end of Grade 3, the student will be able to:~~
~~K-3.D.3.3.1 Create movement based on a theme (e.g. improvise on the topic of the solar system).~~
~~K-3.D.3.3.2 Create a dance phrase with a beginning, middle, and end.~~
~~K-3.D.3.3.3 Communicate an idea through movement.~~
~~K-3.D.3.3.4 Learn and perform a simple dance, following the cues of a leader.~~
~~K-3.D.3.3.5 Create a dance phrase, working productively with others.~~

~~IDAHO CONTENT STANDARDS~~
~~GRADE 4-5~~
~~HUMANITIES: DANCE~~

~~Students are expected to know content and apply skills from previous grades.~~

~~Standard 1:~~ ~~Historical and Cultural Contexts~~

~~Students demonstrate an understanding of how people and cultures are connected across time. Humanities instruction prepares students to work and live as global citizens because of their greater understanding of their own culture and the cultures of others.~~

~~Students in grades 4-5 research and perform various existing dances and create their own original work based on other art disciplines.~~

~~Goal 1.1: Discuss the historical and cultural contexts of dance and perform examples.~~

~~Objective(s): By the end of Grade 5, the student will be able to:~~

- ~~4-5.D.1.1.1 Research and perform dance forms that have evolved during specific periods of history (e.g., ballet, jazz).~~
- ~~4-5.D.1.1.2 Explain how a dance from a culture or time period reflects values of its society.~~

~~Goal 1.2: Demonstrate through movement interrelationships among visual and performing arts disciplines.~~

~~Objective(s): By the end of Grade 5, the student will be able to:~~

- ~~4-5.D.1.2.1 Create a dance based on another art form (e.g., students create a dance phrase based on a poem, a piece of music, or from a costume).~~
- ~~4-5.D.1.2.2 Identify common themes or ideas found in other art forms and communicate them through movement.~~

~~Standard 2: Critical Thinking~~

~~Students understand the purposes and functions of the arts. They build literacy and develop critical thinking through analysis and interpretation.~~

~~Students in grades 4-5 articulate how dance communicates ideas and meaning through artistic choices. Students draw conclusions about dance performances through discussion and observation.~~

~~Goal 2.1: Exercise sound reasoning in understanding and making choices in dance.~~

~~Objective(s): By the end of Grade 5, the student will be able to:~~

- ~~4-5.D.2.1.1 Discuss and show how dance creates and communicates meaning.~~
- ~~4-5.D.2.1.2 Develop and apply dance vocabulary when discussing dance.~~
- ~~4-5.D.2.1.3 Change one section of a dance and discuss how it affects the meaning of the dance.~~

~~Goal 2.2: Formulate and express opinions about dance performances.~~

~~Objective(s): By the end of Grade 5, the student will be able to:~~
- ~~4-5.D.2.2.1 Observe a dance performance, discuss its meaning, and voice a personal response to it.~~
- ~~4-5.D.2.2.2 Discuss the process and effort involved in developing an idea into a dance work.~~

~~Standard 3: Performance~~

~~Students engage in the creation of original works and/or the interpretation of works of others, culminating in a performance or presentation.~~

~~Students in grades 4-5 identify and practice weight shifts and jumps. Students practice warm-up skills and movement phrases from different genres. Students improvise and create choreography to solve movement problems with a partner or a group.~~

~~Goal 3.1: Identify and practice concepts essential to dance.~~

~~Objective(s): By the end of Grade 5, the student will be able to:~~
- ~~4-5.D.3.1.1 Identify and practice transfer of weight, elevation, turning, and falling at varying speeds.~~
- ~~4-5.D.3.1.2 Memorize set patterns of movement.~~
- ~~4-5.D.3.1.3 Identify and practice ways dancers warm up, stretch, and strengthen their bodies.~~

~~Goal 3.2: Communicate in dance through application of artistic concepts, knowledge, and skills.~~

~~Objective(s): By the end of Grade 5, the student will be able to:~~
- ~~4-5.D.3.2.1 Perform dances from at least two different dance disciplines (jazz, ballet, modern, tap, folk).~~
- ~~4-5.D.3.2.2 Demonstrate a rhythmic pattern through movement.~~
- ~~4-5.D.3.2.3 Create and follow a floor pattern.~~

~~Goal 3.3: Communicate in dance through creative expression.~~

~~Objective(s): By the end of Grade 5, the student will be able to:~~
- ~~4-5.D.3.3.1 Improvise or create choreography based on how the body can create shapes, change levels, and move through pathways, using stage directions.~~
- ~~4-5.D.3.3.2 Analyze a movement problem (e.g., move to the floor from standing without using your hands) with a partner or a group, and create a solution.~~
- ~~4-5.D.3.3.3 Develop and communicate new ideas through movement.~~
- ~~4-5.D.3.3.4 Learn and perform a simple dance, expressing its mood~~
- ~~4-5.D.3.3.5 Create a dance phrase, working productively with others, respecting diverse perspectives.~~

~~IDAHO CONTENT STANDARDS~~
~~GRADE 6-8~~
~~HUMANITIES: DANCE~~

~~Students are expected to know content and apply skills from previous grades.~~

~~Standard 1:~~ ~~Historical and Cultural Contexts~~

~~Students demonstrate an understanding of how people and cultures are connected across time. Humanities instruction prepares students to work and live as global citizens because of their greater understanding of their own culture and the cultures of others.~~

~~Students in grades 6-8 investigate and perform a historical dance. Students compare traditional and modern art forms.~~

~~Goal 1.1: Discuss the historical and cultural contexts of dance and perform examples.~~

~~Objective(s): By the end of Grade 8, the student will be able to:~~

- ~~6-8.D.1.1.1 Investigate one dance tradition of the United States and perform it (e.g., square dance, tap dance, Native American dance).~~
- ~~6-8.D.1.1.2 Examine the influence of historical events or culture on the development of a dance form.~~

~~Goal 1.2: Demonstrate through movement interrelationships among visual and performing arts disciplines.~~

~~Objective(s): By the end of Grade 8, the student will be able to:~~

- ~~6-8.D.1.2.1 Compare ballet and modern dance, and find music that is appropriate for each form of dance.~~
- ~~6-8.D.1.2.2 Create a set, costumes, or props for a dance.~~

~~Standard 2: Critical Thinking~~

~~Students understand the purposes and functions of the arts. They build literacy and develop critical thinking through analysis and interpretation.~~

~~Students in grades 6-8 develop criteria and vocabulary for evaluating dance. Students apply the skills of critique in analyzing a dance performance.~~

~~Goal 2.1: Exercise sound reasoning in understanding and making choices in dance.~~

~~Objective(s): By the end of Grade 8, the student will be able to:~~

- ~~6-8.D.2.1.1 Identify criteria for evaluating how well a dance performance conveys meaning.~~
- ~~6-8.D.2.1.2 Use appropriate vocabulary when analyzing a dance performance.~~
- ~~6-8.D.2.1.3 Experiment with how different artistic choices can change the meaning of a dance.~~

~~Goal 2.2: Formulate and express opinions about dance performances.~~

~~Objective(s): By the end of Grade 8, the student will be able to:~~

~~6-8.D.2.2.1 Discuss how various dance disciplines express different ideas and voice a preference for one style.~~
~~6-8.D.2.2.2 Explain how lighting, music, and costuming can contribute to the meaning and/or success of a dance performance.~~

~~Standard 3: Performance~~

~~Students engage in the creation of original works and/or the interpretation of works of others, culminating in a performance or presentation.~~

~~Students in grades 6-8 practice correct increasing strength, flexibility, balance, alignment, and control. Students execute on-and off-balance movement and movement in the three planes. Students create and follow a floor pattern. Students develop their own choreography and work collaboratively with another choreographer.~~

~~Goal 3.1: Identify and practice concepts essential to dance.~~

~~Objective(s): By the end of Grade 8, the student will be able to:~~

~~6-8.D.3.1.1 Practice correct strengthening and stretching sequences.~~
~~6-8.D.3.1.2 Practice maintaining both stationary and moving alignment, balance, and control.~~
~~6-8.D.3.1.3 Practice warming up, stretching, and strengthening body parts.~~

~~Goal 3.2: Communicate in dance through application of artistic concepts, knowledge, and skills.~~

~~Objective(s): By the end of Grade 8, the student will be able to:~~

~~6-8.D.3.2.1 Identify and execute on- and off-balance movement phrases.~~
~~6-8.D.3.2.2 Identify and execute movements in the three planes (vertical, horizontal, and saggital).~~
~~6-8.D.3.2.3 Create and follow a floor pattern.~~
~~6-8.D.3.2.4 Select and/or make costumes that support the intent of a dance.~~

~~Goal 3.3: Communicate in dance through creative expression.~~

~~Objective(s): By the end of Grade 8, the student will be able to:~~

~~6-8.D.3.3.1 Perform short dance works of two different dance disciplines.~~
~~6-8.D.3.3.2 Choreograph a duet.~~
~~6-8.D.3.3.3 Create a round or canon for a group of dancers to perform.~~
~~6-8.D.3.3.4 Memorize, practice, refine, and perform a dance created by someone else, interpreting its meaning.~~
~~6-8.D.3.3.5 Create a dance phrase, working productively with others, respecting diverse perspectives.~~

~~IDAHO CONTENT STANDARDS~~
~~GRADE 9-12~~
~~HUMANITIES: DANCE~~

~~Students are expected to know content and apply skills from previous grades.~~

~~Standard 1: Historical and Cultural Contexts~~

~~Students demonstrate an understanding of how people and cultures are connected across time. Humanities instruction prepares students to work and live as global citizens because of their greater understanding of their own culture and the cultures of others.~~

~~Students in grades 9-12 discuss the role of dance in history and culture and create a dance that reflects a specific historical influence. Students create technical support for dance using other art forms. Students choreograph a dance inspired by another art form.~~

~~Goal 1.1: Discuss the historical and cultural contexts of dance and perform examples.~~

~~Objective(s): By the end of Grade 12, the student will be able to:~~

- ~~9-12.D.1.1.1 Choreograph and perform a dance that illustrates a significant historical event, culture, or concept.~~
- ~~9-12.D.1.1.2 Discuss how dance has a history, purpose, and function in cultures.~~

~~Goal 1.2: Explain the interrelationships among the visual and performing arts disciplines.~~

~~Objective(s): By the end of Grade 12, the student will be able to:~~

- ~~9-12.D.1.2.1 Create functional scenery, properties, lighting, sound, and costumes that enhance a dance performance.~~
- ~~9-12.D.1.2.2 Create an original dance that is inspired by visual arts, music, theatre, or literary works.~~

~~Standard 2: Critical Thinking~~

~~Students understand the purposes and functions of the arts. They build literacy and develop critical thinking through analysis and interpretation.~~

~~Students in grades 9-12 critique dance performances based on meaning, technical support, aesthetics, political and cultural issues, and intent of choreographer. Students apply specific criteria for making informed critical evaluations of performances.~~

~~Goal 2.1: Conduct analyses in dance.~~

~~Objective(s): By the end of Grade 12, the student will be able to:~~

- ~~9-12.D.2.1.1 Write a critique of a dance performance, examining how dance creates and communicates meaning.~~
- ~~9-12.D.2.1.2 Develop and use dance vocabulary to discuss a variety of dance disciplines.~~
- ~~9-12.D.2.1.3 Discuss the aesthetics of dance.~~

~~**Goal 2.2: Formulate and express opinions about dance performances.**~~

~~**Objective(s): By the end of Grade 12, the student will be able to:**~~

~~9-12.D.2.2.1 Apply specific criteria for making informed critical evaluations of the quality and effectiveness of performance, choreography, or other aspects of a dance.~~
~~9-12.D.2.2.2 Explain how lighting, music, and costuming can contribute to the meaning and/or success of a dance performance.~~

~~**Standard 3: Performance**~~

~~Students engage in the creation of original works and/or the interpretation of works of others, culminating in a performance or presentation.~~

~~Students in grades 9-12 practice lengthy and complex movement combinations, performing with contrasting movement qualities. Students identify characteristics of dance styles and perform them. Students choreograph movement phrases and complete dance works.~~

~~**Goal 3.1: Identify and practice concepts essential to dance.**~~

~~**Objective(s): By the end of Grade 12, the student will be able to:**~~

~~9-12.D.3.1.1 Practice lengthy and complex movement combinations in at least two different genres.~~
~~9-12.D.3.1.2 Perform contrasting movement qualities within a dance phrase (e.g., rise and fall, tension and release, glide and dart).~~
~~9-12.D.3.1.3 Perform new movement with an ever-increasing mastery of body alignment, balance, and control.~~

~~**Goal 3.2: Communicate in dance through application of artistic concepts, knowledge, and skills.**~~

~~**Objective(s): By the end of Grade 12, the student will be able to:**~~

~~9-12.D.3.2.1 Perform a dance using contrast in energy and tempo.~~
~~9-12.D.3.2.2 Illustrate the characteristics of a particular dance discipline through a performance that incorporates several skills.~~
~~9-12.D.3.2.3 Create a dance incorporating characteristics of a particular dance discipline.~~
~~9-12.D.3.2.4 Select and/or make costumes that support the intent of a dance.~~

~~**Goal 3.3: Communicate in dance through creative expression.**~~

~~**Objective(s): By the end of Grade 12, the student will be able to:**~~

~~9-12.D.3.3.1 Choreograph a dance based on a theme.~~
~~9-12.D.3.3.2 Choreograph a dance for a duet or a small ensemble.~~
~~9-12.D.3.3.3 Improvise a dance in silence or with an alternative accompaniment (e.g., spoken word, sound effects).~~
~~9-12.D.3.3.4 Memorize, practice, refine, and perform a dance created by someone else, interpreting its meaning and mood.~~
~~9-12.D.3.3.5 Create choreography, articulating reasons for artistic decisions.~~

IDAHO
STATE DEPARTMENT OF EDUCATION

ARTS AND HUMANITIES

DANCE

Approved by the Idaho State Board of Education, August 11, 2016

K-3 Dance

Dance/Creating
#DA.Cr1.1
Process Component: Explore
Anchor Standard: Generate and conceptualize artistic ideas and work.
Enduring Understanding: Choreographers use a variety of sources as inspiration and transform concepts and ideas into movement for artistic expression.
Essential Question: Where do choreographers get ideas for dances?

Grade K
DA.Cr1.1.K
a. Respond in movement to a variety of stimuli (for example, music/sound, text, objects, images, symbols, observed dance).
b. Explore different ways to do basic locomotor and non-locomotor movements by changing at least one of the elements of dance.

Grade 1
DA.Cr1.1.1
a. Explore movement inspired by a variety of stimuli (for example, music/sound, text, objects, images, symbols, observed dance, experiences) and identify the source.
b. Explore a variety of locomotor and non-locomotor movements by experimenting with and changing the elements of dance.

Grade 2
DA.Cr1.1.2
a. Explore movement inspired by a variety of stimuli (for example, music/sound, text, objects, images, symbols, observed dance, experiences) and suggest additional sources for movement ideas.
b. Combine a variety of movements while manipulating the elements of dance.

Grade 3
DA.Cr1.1.3
a. Experiment with a variety of self-identified stimuli (for example, music/sound, text, objects, images, notation, observed dance, experiences) for movement.
b. Explore a given movement problem. Select and demonstrate a solution.

Dance/Creating
#DA.Cr2.1
Process Component: Plan
Anchor Standard: Organize and develop artistic ideas and work.
Enduring Understanding: The elements of dance, dance structures, and choreographic devices serve as both a foundation and a departure point for choreographers.
Essential Question: What influences choice-making in creating choreography?

Grade K
DA.Cr2.1.K
a. Improvise dance that has a beginning, middle, and end.
b. Express an idea, feeling, or image, through improvised movement moving alone or with a partner.

Grade 1
DA.Cr2.1.1
a. Improvise a series of movements that have a beginning, middle, and end, and describe movement choices.
b. Choose movements that express an idea or emotion, or follow a musical phrase.

Grade 2
DA.Cr2.1.2
a. Improvise a dance phrase with a beginning, a middle that has a main idea, and a clear end.
b. Choose movements that express a main idea or emotion, or follow a musical phrase. Explain reasons for movement choices.

Grade 3
DA.Cr2.1.3
a. Identify and experiment with choreographic devices to create simple movement patterns and dance structures (for example, AB, ABA, theme and development).
b. Develop a dance phrase that expresses and communicates an idea or feeling. Discuss the effect of the movement choices.

Dance/Creating
#DA.Cr3.1
Process Component: Revise
Anchor Standard: Refine and complete artistic work.
Enduring Understanding: Choreographers analyze, evaluate, refine, and document their work to communicate meaning.
Essential Question: How do choreographers use self-reflection, feedback from others, and documentation to improve the quality of their work?

Grade K
DA.Cr3.1.K
a. Apply suggestions for changing movement through guided improvisational experiences.
b. Depict a dance movement by drawing a picture or using a symbol.

Grade 1
DA.Cr3.1.1
a. Explore suggestions to change movement from guided improvisation and/or short remembered sequences.
b. Depict several different types of movements of a dance by drawing a picture or using a symbol (e.g., jump, turn, slide, bend, reach).

Grade 2
DA.Cr3.1.2
a. Explore suggestions and make choices to change movement from guided improvisation and/or short remembered sequences.
b. Depict the levels of movements in a variety of dance movements by drawing a picture or using symbols, for example, high, middle, low.

Grade 3
DA.Cr3.1.3
a. Revise movement choices in response to feedback to improve a short dance study. Describe the differences the changes made in the movements.
b. Depict directions or spatial pathways in a dance phrase by drawing a picture map or using a symbol.

Dance/Performing
#DA.Pr4.1
Process Component: Express
Anchor Standard: Select, analyze, and interpret artistic work for presentation.
Enduring Understanding: Space, time, and energy are basic elements of dance.
Essential Question: How do dancers work with space, time and energy to communicate artistic expression?

Grade K
DA.Pr4.1.K
a. Make still and moving body shapes that show lines (e.g., straight, bent, and curved), changes levels, and vary in size (large/small). Join with others to make a circle formation and work with others to change its dimensions.
b. Demonstrate tempo contrasts with movements that match to tempo of sound stimuli.
c. Identify and apply different characteristics to movements (e.g., slow, smooth, or wavy).

Grade 1
DA.Pr4.1.1
a. Demonstrate locomotor and non-locomotor movements that change body shapes, levels, and facings. Move in straight, curved, and zig-zagged pathways. Find and return to place in space. Move with others to form straight lines and circles.
b. Relate quick, moderate and slow movements to duration in time. Recognize steady beat and move to varying tempi of steady beat.
c. Demonstrate movement characteristics along with movement vocabulary (e.g., use adverbs and adjectives that apply to movement such as a bouncy leap, a floppy fall, a jolly jump, and joyful spin).

Grade 2
DA.Pr4.1.2
a. Demonstrate clear directionality and intent when performing locomotor and non-locomotor movements that change body shapes, facings, and pathways in space. Identify symmetrical and asymmetrical body shapes and examine relationships between body parts. Differentiate between circling and turning as two separate ways of continuous directional change.
b. Identify the length of time a move or phrase takes, for example, whether it is long or short. Identify and move on the downbeat in duple and triple meter. Correlate metric phrasing with movement phrasing.
c. Select and apply appropriate characteristics to movements, for example, selecting specific adverbs and adjectives and apply them to movements. Demonstrate kinesthetic awareness while dancing the movement characteristics.

Grade 3
DA.Pr4.1.3
a. Judge spaces as distance traveled and use space three-dimensionally. Demonstrate shapes with positive and negative space. Perform movement sequences in and through space with intentionality and focus.

b. Fulfill specified duration of time with improvised locomotor and non-locomotor movements. Differentiate between "in time" and "out of time" to music. Perform movements that are the same or of a different time orientation to accompaniment. Use metric and kinesthetic phrasing.
c. Fulfill specified duration of time with improvised locomotor and non-locomotor movements. Differentiate between "in time" and "out of time" to music. Perform movements that are the same or of a different time orientation to accompaniment. Use metric and kinesthetic phrasing.

Dance/Performing
#DA.Pr5.1
Process Component: Embody
Anchor Standard: Develop and refine artistic technique and work for presentation.
Enduring Understanding: Dancers use the mind-body connection and develop the body as an instrument for artistry and artistic expression.
Essential Question: What must a dancer do to prepare the mind and body for artistic expression?

Grade K
DA.Pr5.1.K
a. Demonstrate same-side and cross-body locomotor and non-locomotor movements, body patterning movements, and body shapes.
b. Move safely in general space and start and stop on cue during activities, group formations, and creative explorations while maintaining personal space.
c. Move body parts in relation to other body parts and repeat and recall movements upon request.

Grade 1
DA.Pr5.1.1
a. Demonstrate a range of locomotor and non-locomotor movements, body patterning, body shapes, and directionality.
b. Move safely in general space through a range of activities and group formations while maintaining personal space.
c. Modify movements and spatial arrangements upon request.

Grade 2
DA.Pr5.1.2
a. Demonstrate a range of locomotor and non-locomotor movements, body patterning, and dance sequences that require moving through space using a variety of pathways.
b. Move safely in a variety of spatial relationships and formations with other dancers, sharing and maintaining personal space.
c. Repeat movements, with an awareness of self and others in space. Self-adjust and modify movements or placement upon request.

Grade 3
DA.Pr5.1.3
a. Replicate body shapes, movement characteristics, and movement patterns in a dance sequence with awareness of body alignment and core support.
b. Adjust body-use to coordinate with a partner or other dancers to safely change levels, directions, and pathway designs.
c. Recall movement sequences with a partner or in group dance activities. Apply constructive feedback from teacher and self-check to improve dance skills.

Dance/Performing
#DA.Pr6.1
Process Component: Present
Anchor Standard: Convey meaning through the presentation of artistic work.
Enduring Understanding: Dance performance is an interaction between performer, production elements, and audience that heightens and amplifies artistic expression.
Essential Question: How does a dancer heighten artistry in a public performance?

Grade K
DA.Pr6.1.K
a. Dance for and with others in a designated space.
b. Select a prop to use as part of a dance.

Grade 1
DA.Pr6.1.1
a. Dance for others in a space where audience and performers occupy different areas.
b. Explore the use of simple props to enhance performance.

Grade 2
DA.Pr6.1.2
a. Dance for and with others in a space where audience and performers occupy different areas.
b. Use limited production elements (e.g., hand props, simple scenery, or media projections).

Grade 3
DA.Pr6.1.3
a. Identify the main areas of a performance space using production terminology (e.g., stage right, stage left, center stage, upstage, and downstage).
b. Explore simple production elements (e.g., costumes, props, music, scenery, lighting, or media) for a dance performed for an audience in a designated specific performance space.

Dance/Responding
#DA.Re7.1
Process Component: Analyze
Anchor Standard: Perceive and analyze artistic work.
Enduring Understanding: Dance is perceived and analyzed to comprehend its meaning.
Essential Question: How is a dance understood?

Grade K
DA.Re7.1.K
a. Find a movement that repeats in a dance.
b. Demonstrate or describe observed or performed dance movements.

Grade 1
DA.Re7.1.1
a. Find a movement that repeats in a dance to make a pattern.
b. Demonstrate and describe observed or performed dance movements from a specific genre or culture.

Grade 2
DA.Re7.1.2
a. Find movements in a dance that develop a pattern.
b. Demonstrate and describe movements in dances from different genres or cultures.

Grade 3
DA.Re7.1.3
a. Find a movement pattern that creates a movement phrase in a dance work.
b. Demonstrate and explain how one dance genre is different from another, or how one cultural movement practice is different from another.

Dance/Responding
#DA.Re8.1
Process Component: Interpret
Anchor Standard: Interpret intent and meaning in artistic work.
Enduring Understanding: Dance is interpreted by considering intent, meaning, and artistic expression as communicated through the use of the body, elements of dance, dance technique, dance structure, and context.
Essential Question: How is dance interpreted?

Grade K
DA.Re8.1.K
Observe movement and describe it using simple dance terminology.

Grade 1
DA.Re8.1.1
Select movements from a dance that suggest ideas and explain how the movement captures the idea using simple dance terminology.

Grade 2
DA.Re8.1.2
Use context cues from movement to identify meaning and intent in a dance using simple dance terminology.

Grade 3
DA.Re8.1.3
Select specific context cues from movement. Explain how they relate to the main idea of the dance using basic dance terminology.

Dance/Responding
#DA.Re9.1
Process Component: Critique
Anchor Standard: Apply criteria to evaluate artistic work.
Enduring Understanding: Criteria for evaluating dance vary across genres, styles, and cultures.
Essential Question: What criteria are used to evaluate dance?

Grade K
DA.Re9.1.K

Find a movement that was noticed in a dance. Demonstrate the movement that was noticed and explain why it attracted attention.

Grade 1
DA.Re9.1.1
Identify and demonstrate several movements in a dance that attracted attention. Describe the characteristics that make the movements interesting and talk about why they were chosen.

Grade 2
DA.Re9.1.2
Observe or demonstrate dances from a genre or culture. Discuss movements and other aspects of the dances that make the dances work well, and explain why they work. Use simple dance terminology.

Grade 3
DA.Re9.1.3
Select dance movements from specific genres, styles, or cultures. Identify characteristic movements from these dances and describe in basic dance terminology ways in which they are alike and different.

Dance/Connecting
#DA.Cn10.1
Process Component: Synthesize
Anchor Standard: Synthesize and relate knowledge and personal experiences to make art.
Enduring Understanding: As dance is experienced, all personal experiences, knowledge, and contexts are integrated and synthesized to interpret meaning.
Essential Question: How does dance deepen our understanding of ourselves, other knowledge, and events around us?

Grade K
DA.Cn10.1.K
a. Recognize and name an emotion that is experienced when watching, improvising, or performing dance and relate it to a personal experience.
b. Observe a work of visual art. Describe and then express through movement something of interest about the artwork, and ask questions for discussion concerning the artwork.

Grade 1
DA.Cn10.1.1
a. Find an experience expressed or portrayed in a dance that relates to a familiar experience. Identify the movements that communicate this experience.
b. Observe illustrations from a story. Discuss observations and identify ideas for dance movement and demonstrate the big ideas of the story.

Grade 2
DA.Cn10.1.2
a. Describe, create, and/or perform a dance that expresses personal meaning and explain how certain movements express this personal meaning.
b. Respond to a dance work using an inquiry-based set of questions (e.g., See, Think, Wonder. Create movement using ideas from responses and explain how certain movements express a specific idea.

Grade 3

DA.Cn10.1.3
a. Compare the relationships expressed in a dance to relationships with others. Explain how they are the same or different.
b. Ask and research a question about a key aspect of a dance that communicates a perspective about an issue or event. Explore the key aspect through movement. Share movements and describe how the movements help to remember or discover new qualities in these key aspects. Communicate the new learning in oral, written, or movement form.

Dance/Connecting
#DA.Cn11.1
Process Component: Relate
Anchor Standard: Relate artistic ideas and works with societal, cultural and historical context to deepen understanding.
Enduring Understanding: Dance literacy includes deep knowledge and perspectives about societal, cultural, historical, and community contexts.
Essential Question: How does knowing about societal, cultural, historical and community experiences expand dance literacy?

Grade K
DA.Cn11.1.K
Describe or demonstrate the movements in a dance that was watched or performed.

Grade 1
DA.Cn11.1.1
Watch and/or perform a dance from a different culture and discuss or demonstrate the types of movement danced.

Grade 2
DA.Cn11.1.2
Observe a dance and relate the movement to the people or environment in which the dance was created and performed.

Grade 3
DA.Cn11.1.3
Find a relationship between movement in a dance from a culture, society, or community and the culture from which the dance is derived. Explain what the movements communicate about key aspects of the culture, society, or community.

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4-5 Dance

Dance/Creating
#DA.Cr1.1
Process Component: Explore
Anchor Standard: Generate and conceptualize artistic ideas and work.
Enduring Understanding: Choreographers use a variety of sources as inspiration and transform concepts and ideas into movement for artistic expression.
Essential Question: Where do choreographers get ideas for dances?

Grade 4
DA.Cr1.1.4
a. Identify ideas for choreography generated from a variety of stimuli (e.g., music/sound, text, objects, images, notation, observed dance, experiences).
b. Develop a movement problem and manipulate the elements of dance as tools to find a solution.

Grade 5
DA.Cr1.1.5
a. Build content for choreography using several stimuli (e.g., music/sound, text, objects, images, notation, observed dance, experiences, literary forms, natural phenomena, current news, social events).
b. Construct and solve multiple movement problems to develop choreographic content.

Dance/Creating
#DA.Cr2.1
Process Component: Plan
Anchor Standard: Organize and develop artistic ideas and work.
Enduring Understanding: The elements of dance, dance structures, and choreographic devices serve as both a foundation and a departure point for choreographers.
Essential Question: What influences choice-making in creating choreography?

Grade 4
DA.Cr2.1.4
a. Manipulate or modify choreographic devices to expand movement possibilities and create a variety of movement patterns and structures. Discuss movement choices.
b. Develop a dance study that expresses and communicates a main idea. Discuss the reasons and effectiveness of the movement choices.

Grade 5
DA.Cr2.1.5
a. Manipulate or modify a variety of choreographic devices to expand choreographic possibilities and develop a main idea. Explain reasons for movement choices.
b. Develop a dance study by selecting a specific movement vocabulary to communicate a main idea. Discuss how the dance communicates non-verbally.

Dance/Creating
#DA.Cr3.1
Process Component: Revise

Anchor Standard: Refine and complete artistic work.
Enduring Understanding: Choreographers analyze, evaluate, refine, and document their work to communicate meaning.
Essential Question: How do choreographers use self-reflection, feedback from others, and documentation to improve the quality of their work?

Grade 4
DA.Cr3.1.4
a. Revise movement based on peer feedback and self-reflection to improve communication of artistic intent in a short dance study. Explain choices made in the process.
b. Depict the relationships between two or more dancers in a dance phrase by drawing a picture or using symbols (e.g., next to, above, below, behind, in front of).

Grade 5
DA.Cr3.1.5
a. Explore through movement the feedback from others to expand choreographic possibilities for a short dance study that communicates artistic intent. Explain the movement choices and refinements.
b. Record changes in a dance sequence through writing, symbols, or a form of media technology.

Dance/Performing
#DA.Pr4.1
Process Component: Express
Anchor Standard: Select, analyze, and interpret artistic work for presentation.
Enduring Understanding: Space, time, and energy are basic elements of dance.
Essential Question: How do dancers work with space, time and energy to communicate artistic expression?

Grade 4
DA.Pr4.1.4
a. Make static and dynamic shapes with positive and negative space. Perform elevated shapes (jump shapes) with soft landings and movement sequences alone and with others, establishing relationships with other dancers through focus of eyes.
b. Accompany other dancers using a variety of percussive instruments and sounds. Respond in movement to even and uneven rhythms. Recognize and respond to tempo changes as they occur in dance and music.
c. Analyze movements and phrases for use of energy and dynamic changes and use adverbs and adjectives to describe them. Based on the analysis, refine the phrases by incorporating a range of movement characteristics.

Grade 5
DA.Pr4.1.5
a. Integrate static and dynamic shapes and floor and air pathways into dance sequences. Establish relationships with other dancers through focus of eyes and other body parts. Convert inward focus to outward focus for projecting out to far space.
b. Dance to a variety of rhythms generated from internal and external sources. Perform movement phrases that show the ability to respond to changes in time.
c. Contrast bound and free-flowing movements. Motivate movement from both central initiation (torso) and peripheral initiation (distal) and analyze the relationship between initiation and energy.

Dance/Performing
#DA.Pr5.1
Process Component: Embody
Anchor Standard: Develop and refine artistic technique and work for presentation.
Enduring Understanding: Dancers use the mind-body connection and develop the body as an instrument for artistry and artistic expression.
Essential Question: What must a dancer do to prepare the mind and body for artistic expression?

Grade 4
DA.Pr5.1.4
a. Demonstrate fundamental dance skills (e.g., alignment, coordination, balance, core support, kinesthetic awareness) and movement qualities when replicating and recalling patterns and sequences of locomotor and non-locomotor movements.
b. Execute techniques that extend movement range, build strength, and develop endurance. Explain the relationship between execution of technique, safe body-use, and healthful nutrition.
c. Coordinate phrases and timing with other dancers by cueing off each other and responding to stimuli cues (e.g., music, text, or lighting). Reflect on feedback from others to inform personal dance performance goals.

Grade 5
DA.Pr5.1.5
a. Recall and execute a series of dance phrases using fundamental dance skills (e.g., alignment, coordination, balance, core support, kinesthetic awareness, clarity of movement).
b. Demonstrate safe body-use practices during technical exercises and movement combinations. Discuss how these practices, along with healthful eating habits, promote strength, flexibility, endurance and injury prevention.
c. Collaborate with peer ensemble members to repeat sequences, synchronize actions, and refine spatial relationships to improve performance quality. Apply feedback from others to establish personal performance goals.

Dance/Performing
#DA.Pr6.1
Process Component: Present
Anchor Standard: Convey meaning through the presentation of artistic work.
Enduring Understanding: Dance performance is an interaction between performer, production elements, and audience that heightens and amplifies artistic expression.
Essential Question: How does a dancer heighten artistry in a public performance?

Grade 4
DA.Pr6.1.4
a. Consider how to establish a formal performance space from an informal setting (for example, gymnasium or grassy area).
b. Identify, explore, and experiment with a variety of production elements to heighten the artistic intent and audience experience.

Grade 5
DA.Pr6.1.5

a. Demonstrate the ability to adapt dance to alternative performance venues by modifying spacing and movements to the performance space.
b. Identify, explore, and select production elements that heighten and intensify the artistic intent of a dance and are adaptable for various performance spaces.

Dance/Responding
#DA.Re7.1
Process Component: Analyze
Anchor Standard: Perceive and analyze artistic work.
Enduring Understanding: Dance is perceived and analyzed to comprehend its meaning.
Essential Question: How is a dance understood?

Grade 4
DA.Re7.1.4
a. Find patterns of movement in dance works that create a style or theme.
b. Demonstrate and explain how dance styles differ within a genre or within a cultural movement practice.

Grade 5
DA.Re7.1.5
a. Find meaning or artistic intent from the patterns of movement in a dance work.
b. Describe, using basic dance terminology, the qualities and characteristics of style used in a dance from one's own cultural movement practice. Compare them to the qualities and characteristics of style found in a different dance genre, style, or cultural movement practice, also using basic dance terminology.

Dance/Responding
#DA.Re8.1
Process Component: Interpret
Anchor Standard: Interpret intent and meaning in artistic work.
Enduring Understanding: Dance is interpreted by considering intent, meaning, and artistic expression as communicated through the use of the body, elements of dance, dance technique, dance structure, and context.
Essential Question: How is dance interpreted?

Grade 4
DA.Re8.1.4
Relate movements, ideas, and context to decipher meaning in a dance using basic dance terminology.

Grade 5
DA.Re8.1.5
Interpret meaning in a dance based on its movements. Explain how the movements communicate the main idea of the dance using basic dance terminology.

Dance/Responding
#DA.Re9.1
Process Component: Critique
Anchor Standard: Apply criteria to evaluate artistic work.
Enduring Understanding: Criteria for evaluating dance vary across genres, styles, and cultures.

Essential Question: What criteria are used to evaluate dance?

Grade 4
DA.Re9.1.4
Discuss and demonstrate the characteristics that make a dance artistic and apply those characteristics to dances observed or performed in a specific genre, style, or cultural movement practice. Use basic dance terminology.

Grade 5
DA.Re9.1.5
Define the characteristics of dance that make a dance artistic and meaningful. Relate them to the elements of dance in genres, styles, or cultural movement practices. Use basic dance terminology to describe characteristics that make a dance artistic and meaningful.

Dance/Connecting
#DA.Cn10.1
Process Component: Synthesize
Anchor Standard: Synthesize and relate knowledge and personal experiences to make art.
Enduring Understanding: As dance is experienced, all personal experiences, knowledge, and contexts are integrated and synthesized to interpret meaning.
Essential Question: How does dance deepen our understanding of ourselves, other knowledge, and events around us?

Grade 4
DA.Cn10.1.4
a. Relate the main idea or content in a dance to other experiences. Explain how the main idea of a dance is similar to or different from one's own experiences, relationships, ideas or perspectives.
b. Develop and research a question relating to a topic of study in school using multiple sources of references. Select key aspects about the topic and choreograph movements that communicate the information. Discuss what was learned from creating the dance and describe how the topic might be communicated using another form of expression.

Grade 5
DA.Cn10.1.5
a. Compare two dances with contrasting themes. Discuss feelings and ideas evoked by each. Describe how the themes and movements relate to points of view and experiences.
b. Choose a topic, concept, or content from another discipline of study and research how other art forms have expressed the topic. Create a dance study that expresses the idea. Explain how the dance study expressed the idea and discuss how this learning process is similar to, or different from, other learning situations.

Dance/Connecting
#DA.Cn11.1
Process Component: Relate
Anchor Standard: Relate artistic ideas and works with societal, cultural and historical context to deepen understanding.
Enduring Understanding: Dance literacy includes deep knowledge and perspectives about societal, cultural, historical, and community contexts.

Essential Question: How does knowing about societal, cultural, historical and community experiences expand dance literacy?

Grade 4
DA.Cn11.1.4
Select and describe movements in a specific genre or style and explain how the movements relate to the culture, society, historical period, or community from which the dance originated.

Grade 5
DA.Cn11.1.5
Describe how the movement characteristics and qualities of a dance in a specific genre or style communicate the ideas and perspectives of the culture, historical period, or community from which the genre or style originated.

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6-8 Dance

Dance/Creating
#DA.Cr1.1
Process Component: Explore
Anchor Standard: Generate and conceptualize artistic ideas and work.
Enduring Understanding: Choreographers use a variety of sources as inspiration and transform concepts and ideas into movement for artistic expression.
Essential Question: Where do choreographers get ideas for dances?

Grade 6
DA.Cr1.1.6
a. Relate similar or contrasting ideas to develop choreography using a variety of stimuli (e.g., music, observed dance, literary forms, notation, natural phenomena, personal experience/recall, current news or social events).
b. Explore various movement vocabularies to transfer ideas into choreography.

Grade 7
DA.Cr1.1.7
a. Compare a variety of stimuli (e.g., music, observed dance, literary forms, notation, natural phenomena, personal experience/recall, current news or social events) and make selections to expand movement vocabulary and artistic expression.
b. Explore various movement vocabularies to express an artistic intent in choreography. Explain and discuss the choices made using genre-specific dance terminology.

Grade 8
DA.Cr1.1.8
a. Implement movement from a variety of stimuli (e.g., music, observed dance, literary forms, notation, natural phenomena, personal experience/recall, current news or social events) to develop dance content for an original dance study or dance.
b. Identify and select personal preferences to create an original dance study or dance. Use genre-specific dance terminology to articulate and justify choices made in movement development to communicate intent.

Dance/Creating
#DA.Cr2.1
Process Component: Plan
Anchor Standard: Organize and develop artistic ideas and work.
Enduring Understanding: The elements of dance, dance structures, and choreographic devices serve as both a foundation and a departure point for choreographers.
Essential Question: What influences choice-making in creating choreography?

Grade 6
DA.Cr2.1.6
a. Explore choreographic devices and dance structures to develop a dance study that supports an artistic intent. Explain the goal or purpose of the dance.
b. Determine artistic criteria to choreograph a dance study that communicates personal or cultural meaning. Based on the criteria, evaluate why some movements are more or less effective than others.

Grade 7
DA.Cr2.1.7
a. Use a variety of choreographic devices and dance structures to develop a dance study with a clear artistic intent. Articulate reasons for movement and structural choices.
b. Determine artistic criteria to choreograph a dance study that communicates personal or cultural meaning. Articulate how the artistic criteria serve to communicate the meaning of the dance.

Grade 8
DA.Cr2.1.8
a. Collaborate to select and apply a variety of choreographic devices and dance structures to choreograph an original dance study or dance with a clear artistic intent. Articulate the group process for making movement and structural choices.
b. Define and apply artistic criteria to choreograph a dance that communicates personal or cultural meaning. Discuss how the criteria clarify or intensify the meaning of the dance.

Dance/Creating
#DA.Cr3.1
Process Component: Revise
Anchor Standard: Refine and complete artistic work.
Enduring Understanding: Choreographers analyze, evaluate, refine, and document their work to communicate meaning.
Essential Question: How do choreographers use self-reflection, feedback from others, and documentation to improve the quality of their work?

Grade 6
DA.Cr3.1.6
a. Revise dance compositions using collaboratively developed artistic criteria. Explain reasons for revisions and how choices made relate to artistic intent.
b. Explore or invent a system to record a dance sequence through writing, symbols, or a form of media technology.

Grade 7
DA.Cr3.1.7
a. Evaluate possible revisions of dance compositions and, if necessary, consider revisions of artistic criteria based on self-reflection and feedback of others. Explain reasons for choices and how they clarify artistic intent.
b. Investigate a recognized system to document a dance sequence by using words, symbols, or media technologies.

Grade 8
DA.Cr3.1.8
a. Revise choreography collaboratively or independently based on artistic criteria, self-reflection, and the feedback of others. Articulate the reasons for choices and revisions and explain how they clarify and enhance the artistic intent.
b. Experiment with aspects of a recognized system to document a section of a dance by using words, symbols, or media technologies.

Dance/Performing

#DA.Pr4.1
Process Component: Express
Anchor Standard: Select, analyze, and interpret artistic work for presentation.
Enduring Understanding: Space, time, and energy are basic elements of dance.
Essential Question: How do dancers work with space, time and energy to communicate artistic expression?

Grade 6
DA.Pr4.1.6
a. Refine partner and ensemble skills in the ability to judge distance and spatial design. Establish diverse pathways, levels, and patterns in space. Maintain focus with partner or group in near and far space.
b. Use combinations of sudden and sustained timing as it relates to both the time and the dynamics of a phrase or dance work. Accurately use accented and unaccented beats in 3/4 and 4/4 meter.
c. Use the internal body force created by varying tensions within one's musculature for movement initiation and dynamic expression. Distinguish between bound and free-flowing movements and appropriately apply them to technique exercises and dance phrases.

Grade 7
DA.Pr4.1.7
a. Expand movement vocabulary of floor and air pattern designs. Incorporate and modify body designs from different dance genres and styles for the purpose of expanding movement vocabulary to include differently designed shapes and movements for interest and contrast.
b. Vary durational approach in dance phrasing by using timing accents and variations within a phrase to add interest kinesthetically, rhythmically, and visually.
c. Compare and contrast movement characteristics from a variety of dance genres or styles. Discuss specific characteristics and use adverbs and adjectives to describe them. Determine what dancers must do to perform them clearly.

Grade 8
DA.Pr4.1.8
a. Sculpt the body in space and design body shapes in relation to other dancers, objects, and environment. Use focus of eyes during complex floor and air patterns or direct and indirect pathways.
b. Analyze and select metric, kinetic, and breath phrasing and apply appropriately to dance phrases. Perform dance phrases of different lengths that use various timings within the same section. Use different tempi in different body parts at the same time.
c. Direct energy and dynamics in such a way that movement is textured.
Incorporate energy and dynamics to technique exercises and dance performance.
Use energy and dynamics to enhance and project movements.

Dance/Performing
#DA.Pr5.1
Process Component: Embody
Anchor Standard: Develop and refine artistic technique and work for presentation.
Enduring Understanding: Dancers use the mind-body connection and develop the body as an instrument for artistry and artistic expression.
Essential Question: What must a dancer do to prepare the mind and body for artistic expression?

Grade 6
DA.Pr5.1.6

a. Embody technical dance skills (e.g., alignment, coordination, balance, core support, kinesthetic awareness, clarity of movement) to accurately execute changes of direction, levels, facings, pathways, elevations and landings, extensions of limbs, and movement transitions.
b. Apply basic anatomical knowledge, proprioceptive feedback, spatial awareness, and nutrition to promote safe and healthful strategies when warming up and dancing.
c. Collaborate as an ensemble to refine dances by identifying what works and does not work in executing complex patterns, sequences, and formations. Solve movement problems to dances by testing options and finding good results. Document self-improvements over time.

Grade 7
DA.Pr5.1.7
a. Apply body-use strategies to accommodate physical maturational development to technical dance skills (e.g., functional alignment, coordination, balance, core support, kinesthetic awareness, clarity of movement, weight shifts, flexibility/range of motion).
b. Utilize healthful practices and sound nutrition in dance activities and everyday life. Discuss benefits of practices and how choices enhance performance.
c. Collaborate with peers to practice and refine dances. Develop group performance expectations through observation and analyses (e.g., view live or recorded professional dancers and collaboratively develop group performance expectations based on information gained from observations).

Grade 8
DA.Pr5.1.8
a. Embody technical dance skills (e.g., functional alignment, coordination, balance, core support, clarity of movement, weight shifts, flexibility/range of motion) to replicate, recall, and execute spatial designs and musical or rhythmical dance phrases.
b. Evaluate personal healthful practices in dance activities and everyday life including nutrition and injury prevention. Discuss choices made, the effects experienced, and methods for improvement.
c. Collaborate with peers to discover strategies for achieving performance accuracy, clarity, and expressiveness. Articulate personal performance goals and practice to reach goals. Document personal improvement over time (e.g., journaling, portfolio, or timeline).

Dance/Performing
#DA.Pr6.1
Process Component: Present
Anchor Standard: Convey meaning through the presentation of artistic work.
Enduring Understanding: Dance performance is an interaction between performer, production elements, and audience that heightens and amplifies artistic expression.
Essential Question: How does a dancer heighten artistry in a public performance?

Grade 6
DA.Pr6.1.6
a. Recognize needs and adapt movements to performance area. Use performance etiquette and performance practices during class, rehearsal and performance. Post-performance, accept notes from choreographer and make corrections as needed and apply to future performances.
b. Compare and contrast a variety of possible production elements that would intensify and heighten the artistic intent of the work. Select choices and explain reasons for the decisions made using production terminology.

Grade 7

DA.Pr6.1.7
a. Recommend changes to and adapt movements to performance area. Use performance etiquette and performance practices during class, rehearsal and performance. Maintain journal documenting these efforts. Post-performance, accept notes from choreographer and apply corrections to future performances.
b. Explore possibilities of producing dance in a variety of venues or for different audiences and, using production terminology, explain how the production elements would be handled in different situations.

Grade 8
DA.Pr6.1.8
a. Demonstrate leadership qualities (e.g. commitment, dependability, responsibility, and cooperation) when preparing for performances. Use performance etiquette and performance practices during class, rehearsal and performance. Document efforts and create a plan for ongoing improvements. Post-performance, accept notes from choreographer and apply corrections to future performances.
b. Collaborate to design and execute production elements that would intensify and heighten the artistic intent of a dance performed on a stage, in a different venue, or for different audiences. Explain reasons for choices using production terminology.

Dance/Responding
#DA.Re7.1
Process Component: Analyze
Anchor Standard: Perceive and analyze artistic work.
Enduring Understanding: Dance is perceived and analyzed to comprehend its meaning.
Essential Question: How is a dance understood?

Grade 6
DA.Re7.1.6
a. Describe or demonstrate recurring patterns of movement and their relationships in dance.
b. Explain how the elements of dance are used in a variety of dance genres, styles, or cultural movement practices. Use genre-specific dance terminology.

Grade 7
DA.Re7.1.7
a. Compare, contrast, and discuss patterns of movement and their relationships in dance.
b. Compare and contrast how the elements of dance are used in a variety of genres, styles, or cultural movement practices. Use genre-specific dance terminology.

Grade 8
DA.Re7.1.8
a. Describe, demonstrate and discuss patterns of movement and their relationships in dance in context of artistic intent.
b. Explain how the elements of dance are used in a variety of genres, styles, or cultural movement practices to communicate intent. Use genre-specific dance terminology.

Dance/Responding
#DA.Re8.1
Process Component: Interpret

Anchor Standard: Interpret intent and meaning in artistic work.
Enduring Understanding: Dance is interpreted by considering intent, meaning, and artistic expression as communicated through the use of the body, elements of dance, dance technique, dance structure, and context.
Essential Question: How is dance interpreted?

Grade 6
DA.Re8.1.6
Explain how the artistic expression of a dance is achieved through the elements of dance, use of body, dance technique, dance structure, and context. Explain how these communicate the intent of the dance using genre specific dance terminology.

Grade 7
DA.Re8.1.7
Compare the meaning of different dances. Explain how the artistic expression of each dance is achieved through the elements of dance, use of body, dance technique, and context. Use genre specific dance terminology.

Grade 8
DA.Re8.1.8
Select a dance and explain how artistic expression is achieved through relationships among the elements of dance, use of body, dance technique and context. Cite evidence in the dance to support your interpretation using genre specific dance terminology.

Dance/Responding
#DA.Re9.1
Process Component: Critique
Anchor Standard: Apply criteria to evaluate artistic work.
Enduring Understanding: Criteria for evaluating dance vary across genres, styles, and cultures.
Essential Question: What criteria are used to evaluate dance?

Grade 6
DA.Re9.1.6
Discuss the characteristics and artistic intent of a dance from a genre, style, or cultural movement practice and develop artistic criteria to critique the dance using genre-specific dance terminology.

Grade 7
DA.Re9.1.7
Compare artistic intent, content and context from dances to examine the characteristics of genre, style, or cultural movement practice. Based on the comparison, refine artistic criteria using genre-specific dance terminology.

Grade 8
DA.Re9.1.8
Use artistic criteria to determine what makes an effective performance. Consider content, context, genre, style, or cultural movement practice to comprehend artistic expression. Use genre-specific dance terminology.

Dance/Connecting

#DA.Cn10.1
Process Component: Synthesize
Anchor Standard: Synthesize and relate knowledge and personal experiences to make art.
Enduring Understanding: As dance is experienced, all personal experiences, knowledge, and contexts are integrated and synthesized to interpret meaning.
Essential Question: How does dance deepen our understanding of ourselves, other knowledge, and events around us?

Grade 6
DA.Cn10.1.6
a. Observe the movement characteristics or qualities observed in a specific dance genre. Describe differences and similarities about what was observed to one's attitudes and movement preferences.
b. Conduct research using a variety of resources to find information about a social issue of great interest. Use the information to create a dance study that expresses a specific point of view on the topic. Discuss whether the experience of creating and sharing the dance reinforces personal views or offers new knowledge and perspectives.

Grade 7
DA.Cn10.1.7
a. Compare and contrast the movement characteristics or qualities found in a variety of dance genres. Discuss how the movement characteristics or qualities differ from one's own movement characteristics or qualities and how different perspectives are communicated.
b. Research the historical development of a dance genre or style. Use knowledge gained from the research to create a dance study that evokes the essence of the style or genre. Share the study with peers as part of a lecture demonstration that tells the story of the historical journey of the chosen genre or style. Document the process of research and application.

Grade 8
DA.Cn10.1.8
a. Relate connections found between different dances and discuss the relevance of the connections to the development of one's personal perspectives.
b. Investigate two contrasting topics using a variety of research methods. Identify and organize ideas to create representative movement phrases. Create a dance study exploring the contrasting ideas. Discuss how the research informed the choreographic process and deepens understanding of the topics.

Dance/Connecting
#DA.Cn11.1
Process Component: Relate
Anchor Standard: Relate artistic ideas and works with societal, cultural and historical context to deepen understanding.
Enduring Understanding: Dance literacy includes deep knowledge and perspectives about societal, cultural, historical, and community contexts.
Essential Question: How does knowing about societal, cultural, historical and community experiences expand dance literacy?

Grade 6
DA.Cn11.1.6
Interpret and show how the movement and qualities of a dance communicate its cultural, historical, and/or community purpose or meaning.

Grade 7

DA.Cn11.1.7

Compare, contrast, and discuss dances performed by people in various localities or communities. Formulate possible reasons why similarities and differences developed in relation to the ideas and perspectives important to each social group.

Grade 8

DA.Cn11.1.8

Analyze and discuss, how dances from a variety of cultures, societies, historical periods, or communities reveal the ideas and perspectives of the people.

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High School Dance

Dance/Creating #DA: Cr1.1
Process Component: Explore
Anchor Standard: Generate and conceptualize artistic ideas and work.
Enduring Understanding: Choreographers use a variety of sources as inspiration and transform concepts and ideas into movement for artistic expression.
Essential Question: Where do choreographers get ideas for dances?

HS Proficient
DA.Cr1.1.HSI
a. Explore a variety of stimuli for sourcing movement to develop an improvisational or choreographed dance study. Analyze the process and the relationship between the stimuli and the movement.
b. Experiment with the elements of dance to explore personal movement preferences and strengths, and select movements that challenge skills and build on strengths in an original dance study or dance.

HS Advanced
DA.Cr1.1.HSIII
a. Synthesize content generated from stimulus material. Experiment and take risks to discover a personal voice to communicate artistic intent.
b. Expand personal movement preferences and strengths to discover unexpected solutions that communicate the artistic intent of an original dance. Analyze the unexpected solutions and explain why they were effective in expanding artistic intent.

Dance/Creating #DA.Cr2.1
Process Component: Plan
Anchor Standard: Organize and develop artistic ideas and work.
Enduring Understanding: The elements of dance, dance structures, and choreographic devices serve as both a foundation and a departure point for choreographers.
Essential Question: What influences choice-making in creating choreography?

HS Proficient
DA.Cr2.1.HSI
a. Collaborate to design a dance using choreographic devices and dance structures to support an artistic intent. Explain how the dance structures clarify the artistic intent.
b. Develop an artistic statement for an original dance study or dance. Discuss how the use of movement elements, choreographic devices and dance structures serve to communicate the artistic statement.

HS Advanced
DA.Cr2.1.HSIII
a. Demonstrate fluency and personal voice in designing and choreographing original dances. Justify choreographic choices and explain how they are used to intensify artistic intent.
b. Construct an artistic statement that communicates a personal, cultural and artistic perspective.

Dance/Creating #DA.Cr3.1
Process Component: Revise
Anchor Standard: Refine and complete artistic work.

Enduring Understanding: Choreographers analyze, evaluate, refine, and document their work to communicate meaning.
Essential Question: How do choreographers use self-reflection, feedback from others, and documentation to improve the quality of their work?

HS Proficient
DA.Cr3.1.HSI
a. Clarify the artistic intent of a dance by manipulating choreographic devices and dance structures based on established artistic criteria and feedback from others. Analyze and evaluate impact of choices made in the revision process.
b. Compare recognized systems to document a section of a dance using writing, symbols, or media technologies.

HS Advanced
DA.Cr3.1.HSIII
a. Clarify the artistic intent of a dance by manipulating and refining choreographic devices, dance structures, and artistic criteria using self-reflection and feedback from others. Document choices made in the revision process and justify how the refinements support artistic intent.
b. Document a dance using recognized systems of dance documentation (e.g., writing, a form of notation symbols, or using media technologies).

Dance/Performing #DA.Pr4.1
Process Component: Express
Anchor Standard: Select, analyze, and interpret artistic work for presentation.
Enduring Understanding: Space, time, and energy are basic elements of dance.
Essential Question: How do dancers work with space, time and energy to communicate artistic expression?

HS Proficient
DA: Pr4.1.HSI
a. Develop partner and ensemble skills that enable contrasting level changes through lifts, balances, or other means while maintaining a sense of spatial design and relationship. Use space intentionally during phrases and through transitions between phrases. Establish and break relationships with others as appropriate to the choreography.
b. Use syncopation and accent movements related to different tempi. Take rhythmic cues from different aspects of accompaniment. Integrate breath phrasing with metric and kinesthetic phrasing.
c. Connect energy and dynamics to movements by applying them in and through all parts of the body. Develop total body awareness so that movement phrases demonstrate variances of energy and dynamics.

HS Advanced
DA.Pr4.1.HSIII
a. Modulate and use the broadest range of movement in space for artistic and expressive clarity. Use inward and outward focus to clarify movement and intent. Establish and break relationships with other dancers and audience as appropriate to the dance.
b. Modulate time factors for artistic interest and expressive acuity. Demonstrate time complexity in phrasing with and without musical accompaniment. Use multiple and complex rhythms (e.g., contrapuntal and/or polyrhythmic) at the same time. Work with and against rhythm of accompaniment or sound environments.
c. Modulate dynamics to clearly express intent while performing dance phrases and choreography.

Perform movement sequences expressively using a broad dynamic range and employ dynamic skills for establishing relationships with other dancers and projecting to the audience.

Dance/Performing
#DA.Pr5.1
Process Component: Embody
Anchor Standard: Develop and refine artistic technique and work for presentation.
Enduring Understanding: Dancers use the mind-body connection and develop the body as an instrument for artistry and artistic expression.
Essential Question: What must a dancer do to prepare the mind and body for artistic expression?

HS Proficient
DA.Pr5.1.HSI
a. Embody technical dance skills (e.g., functional alignment, coordination, balance, core support, clarity of movement, weight shifts, flexibility/range of motion) to retain and execute dance choreography.
b. Develop a plan for healthful practices in dance activities and everyday life including nutrition and injury prevention. Discuss implementation of the plan and how it supports personal performance goals.
c. Collaborate with peers to establish and implement a rehearsal plan to meet performance goals. Use a variety of strategies to analyze and evaluate performances of self and others, for example, use video recordings of practice to analyze the difference between the way movements look and how they feel to match performance with visual affect. Articulate performance goals and justify reasons for selecting particular practice strategies.

HS Advanced
DA.Pr5.1.HSIII
a. Apply body-mind principles to technical dance skills in complex choreography when performing solo, partnering, or dancing in ensemble works in a variety of dance genres and styles. Self-evaluate performances and discuss and analyze performance ability with others.
b. Research healthful and safe practices for dancers and modify personal practice based on findings. Discuss how research informs practice.
c. Initiate, plan, and direct rehearsals with attention to technical details and fulfilling artistic expression. Use a range of rehearsal strategies to achieve performance excellence.

Dance/Performing
#DA.Pr6.1
Process Component: Present
Anchor Standard: Convey meaning through the presentation of artistic work.
Enduring Understanding: Dance performance is an interaction between performer, production elements, and audience that heightens and amplifies artistic expression.
Essential Question: How does a dancer heighten artistry in a public performance?

Grade HS Proficient
DA.Pr6.1.HSI
a. Demonstrate leadership qualities (e.g., commitment, dependability, responsibility, and cooperation) when preparing for performances. Demonstrate performance etiquette and performance practices during class, rehearsal and performance. Post-performance, accept notes from choreographer and apply corrections to future performances. Document the rehearsal and performance process and evaluate methods and strategies using dance terminology and production terminology.

b. Evaluate possible designs for the production elements of a performance and select and execute the ideas that would intensify and heighten the artistic intent of the dances.

Grade HS Advanced
DA.Pr6.1.HSIII
a. Demonstrate leadership qualities (e.g., commitment, dependability, responsibility, and cooperation) when preparing for performances. Model performance etiquette and performance practices during class, rehearsal and performance. Enhance performance using a broad repertoire of strategies for dynamic projection. Develop a professional portfolio (e.g., resume, head shot) that documents the rehearsal and performance process with fluency in professional dance terminology and production terminology.
b. Work collaboratively to produce dance concerts in a variety of venues and design and organize the production elements that would be necessary to fulfill the artistic intent of the dance works in each of the venues.

Dance/Responding
#DA.Re7.1
Process Component: Analyze
Anchor Standard: Perceive and analyze artistic work.
Enduring Understanding: Dance is perceived and analyzed to comprehend its meaning.
Essential Question: How is a dance understood?

Grade HS Proficient
DA.Re7.1.HSI
a. Analyze recurring patterns of movement and their relationships in dance in context of artistic intent.
b. Analyze the use of elements of dance in a variety of genres, styles, or cultural movement practices within its cultural context to communicate intent. Use genre-specific dance terminology.

Grade HS Advanced
DA.Re7.1.HSIII
a. Analyze dance works from a variety of dance genres and styles and explain how recurring patterns of movement and their relationships create well-structured and meaningful choreography.
b. Explain how dance communicates aesthetic and cultural values in a variety of genres, styles, or cultural movement practices. Use genre-specific dance terminology.

Dance/Responding
#DA.Re8.1
Process Component: Interpret
Anchor Standard: Interpret intent and meaning in artistic work.
Enduring Understanding: Dance is interpreted by considering intent, meaning, and artistic expression as communicated through the use of the body, elements of dance, dance technique, dance structure, and context.
Essential Question: How is dance interpreted?

Grade HS Proficient
DA.Re8.1.HSI
Select and compare different dances and discuss their intent and artistic expression. Explain how the relationships among the elements of dance, use of body, dance technique, and context enhance meaning and support intent using genre specific dance terminology.

Grade HS Advanced
DA.Re8.1.HSIII
Analyze and interpret how the elements of dance, execution of dance movement principles, and context contribute to artistic expression across different genres, styles, or cultural movement practices.
Use genre specific dance terminology.

Dance/Responding
#DA: Re9.1
Process Component: Critique
Anchor Standard: Apply criteria to evaluate artistic work.
Enduring Understanding: Criteria for evaluating dance vary across genres, styles, and cultures.
Essential Question: What criteria are used to evaluate dance?

Grade HS Proficient
DA.Re9.1.HSI
Analyze the artistic expression of a dance. Discuss insights using evaluative criteria and dance terminology.

Grade HS Advanced
DA.Re9.1.HSIII
Define personal artistic preferences to critique dance. Consider societal and personal values, and a range of artistic expression. Discuss perspectives with peers and justify views.

Dance/Connecting
#DA.Cn10.1
Process Component: Synthesize
Anchor Standard: Synthesize and relate knowledge and personal experiences to make art.
Enduring Understanding: As dance is experienced, all personal experiences, knowledge, and contexts are integrated and synthesized to interpret meaning.
Essential Question: How does dance deepen our understanding of ourselves, other knowledge, and events around us?

Grade HS Proficient
DA.Cn10.1.HSI
a. Analyze a dance to determine the ideas expressed by the choreographer. Explain how the perspectives expressed by the choreographer may impact one's own interpretation. Provide evidence to support one's analysis.
b. Identify collaboratively a dance related question or problem. Conduct research through interview, research database, text, media, or movement. Analyze and apply information gathered by creating a group dance that answers the question posed. Discuss how the dance communicates new perspectives or realizations. Compare orally and in writing the process used in choreography to that of other creative, academic, or scientific procedures.

Grade HS Advanced
DA.Cn10.1.HSIII

a. Review original choreography developed over time with respect to its content and context and its relationship to personal perspectives. Reflect on and analyze the variables that contributed to changes in one's personal growth.
b. Investigate various dance related careers through a variety of research methods and techniques. Select those careers of most interest. Develop and implement a Capstone Project that reflects a possible career choice.

Dance/Connecting
#DA.Cn11.1
Process Component: Relate
Anchor Standard: Relate artistic ideas and works with societal, cultural and historical context to deepen understanding.
Enduring Understanding: Dance literacy includes deep knowledge and perspectives about societal, cultural, historical, and community contexts.
Essential Question: How does knowing about societal, cultural, historical and community experiences expand dance literacy?

Grade HS Proficient
DA.Cn11.1.HSI
Analyze and discuss dances from selected genres or styles and/or historical time periods, and formulate reasons for the similarities and differences between them in relation to the ideas and perspectives of the peoples from which the dances originate.

Grade HS Advanced
DA.Cn11.1.HSIII
Analyze dances from several genres or styles, historical time periods, and/or world dance forms. Discuss how dance movement characteristics, techniques, and artistic criteria relate to the ideas and perspectives of the peoples from which the dances originate, and how the analysis has expanded one's dance literacy.

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GLOSSARY: Dance

Aesthetic
A set of principles concerned with the nature and appreciation of beauty

Alignment
The process of adjusting the skeletal and muscular system to gravity to support effective functionality

Alternative performance venue
A performance site other than a standard Western style theater (for example, classroom, site specific venue, or natural environment)

Anatomical principles
The way the human body's skeletal, muscular and vascular systems work separately and in coordination

Artistic criteria
Aspects of craft and skill used to fulfill artistic intent

Artistic expression
The manifestations of artistic intent though dance drama music, poetry, fiction, painting, sculpture or other artistic media. In dance, this involves the dance and the dancers within a context

Artistic statement
An artist's verbal or written introduction of their work from their own perspective to convey the deeper meaning or purpose

Body patterning
Neuromuscular patterns (for example, core-distal, head-tail, homologous [upper-lower], homo-lateral [same-side], cross-lateral [crossing the body midline])

Body-mind principles
Concepts explored and/or employed to support body-mind connections (for example, breath, awareness of the environment, grounding, movement initiation, use of imagery, intention, inner-outer, stability-mobility)

Body-use
The ways in which movement patterns and body parts are used in movement and dance practice; descriptive method of identifying patterns

Bound movement
An "effort element" from Laban Movement Analysis in which energy flow is constricted

Capstone Project
A culminating performance-based assessment that determines what 12th graders should know and be able to do in various educational disciplines; usually based on research and the development of a major product or project that is an extension of the research

Choreographic devices
Manipulation of dance movement, sequences or phrases (repetition, inversion, accumulation, cannon, retrograde, call and response)

Codified movement
Common motion or motions set in a particular style that often have specific names and expectations associated with it

Context clues
Information obtained from the dance that helps one understand or comprehend meaning and intent from a movement, group of movements, or a dance as a whole; requires seeing

Contrapuntal
An adjective that describes the noun counterpoint; music that has at least two melodic lines (voices) played simultaneously against each other; in dance, at least two movement patterns, sequences or phrases danced simultaneously using different body parts or performed by different dancers

Cultural movement practice
Physical movements of a dance that is associated with a particular country, community, or people

Dance literacy
The total experience of dance learning that includes the doing and knowing about dance: dance skills and techniques, dance making, knowledge and understanding of dance vocabulary, dance history, dance from different cultures, dance genres, repertory, performers and choreographers, dance companies, and dance notation and preservation

Dance movement principles
Fundamentals related to the craft and skill with which dance movement is performed (for example, the use of dynamic alignment, breath support, core support, rotation, initiation and sequencing, and weight shift)

Dance phrase
A brief sequence of related movements that have a sense of continuity and artistic or rhythmic completion

Dance structures
The organization of choreography and movement to fulfill the artistic intent of a dance or dance study (for example, AB, ABA or theme and variation); often referred to as choreographic form

Dance study
A short dance that is comprised of several dance phrases based on an artistic idea

Dance techniques
The tools and skills needed to produce a particular style of movement

Dance terminology
Vocabulary used to describe dance and dance experiences

> **Simple dance terminology** (Tier 1/PreK-2): Basic pedestrian language (for example, locomotor words walk, run, tip-toe, slither, roll, crawl, jump, march, and gallop; and non-locomotor words, bend, twist, turn, open and close)
>
> **Basic dance terminology** (Tier 2/grades 3-5): Vocabulary used to describe dance movement techniques, structures, works, and experiences that are widely shared in the field of dance (for example, stage terminology, compositional vocabulary, language defining dance structures and devices, anatomical references, dance techniques such as alignment or “line”)

Genre-specific dance terminology (Tier 3/grades 6 up): Words used to describe movement within specific dance forms ballet, contemporary, culturally-specific dance, funk, hip-hop, jazz, modern, tap, and others (for example, in Polynesian dance (Hula), auwana, kahiko, halau, kaholo, uwehe, ami); in ballet: glissade, pas de bouree, pas de chat, arabesque; in jazz: kick ball change, pencil turn, jazz walk, jazz run; in modern: contraction, triplets, spiral, pivot turn; and in tap: shuffle-step, cramp roll, riff, wing, time step

Dance work
A complete dance that has a beginning, middle (development), and end

Dynamics
The qualities or characteristics of movement which lend expression and style; also called "efforts," or "energy (for example, lyrical, sustained, quick, light, or strong)

Elements of dance
The key components of movement; movement of the body using space, time, and energy; often referred to as the elements of movement; see Elements of Dance Organizer by Perpich Center for Arts Education (used with permission)

Embody
To physicalize a movement, concept, or idea throughout the body

Energy
The dynamic quality, force attach, weight, and flow of movement

Evaluative Criteria
The definition of values and characteristics with which dance can be assessed; factors to be considered to attain an aesthetically satisfying dance composition or performance

Explore
Investigate multiple movement possibilities to learn more about an idea

Free flowing movement
An "effort element" from Laban Movement Analysis in which energy is continuous

Functional alignment
The organization of the skeleton and musculature in a relationship to gravity that supports safe and efficient movement while dancing

General Space
Spatial orientation that is not focused towards one area of a studio or stage

Genre
A category of dance characterized by similarities in form, style, purpose, or subject matter (for example, ballet, hip hop, modern, ballroom, cultural practices)

Kinesthetic awareness
Pertaining to sensations and understanding of bodily movement

Locomotor

Movement that travels from one location to another or in a pathway through space (for example, in Pre-K, walk, run, tip-toe, slither, roll, crawl, jump, march, gallop; in Kindergarten, the addition of prance, hop, skip, slide, leap)

Movement Characteristics
The qualities, elements, or dynamics that describe or define a movement

Movement phrase
A brief sequence of related movements that have a sense of continuity and artistic or rhythmic completion

Movement problem
A specific focus that requires one find a solution and complete a task; gives direction and exploration in composition

Movement vocabulary
Codified or personal movement characteristics that define a movement style

Negative space
The area (space) around and between the dancer(s) or dance images(s) in a dance

Non-locomotor
Movement that remains in place; movement that does not travel from one location to another or in a pathway through space for example, in Pre-K, bend, twist, turn, open, close; in Kindergarten, swing, sway, spin, reach, pull)

Performance etiquette
Performance values and expected behaviors when rehearsing or performing (for instance, no talking while the dance is in progress, no chewing gum, neat and appropriate appearance, dancers do not call out to audience members who are friends)

Personal space
The area of space directly surrounding one's body extending as far as a person can reach; also called the kinesphere

Polyrhythmic
In music, several rhythms layered on top of one another and played simultaneously; in dance, embodying several rhythms simultaneously in different body parts

Production elements
Aspects of performance that produce theatrical effects (for example, costumes, make up, sound, lighting, props)

Production terminology
Words commonly used to refer to the stage, performance setting, or theatrical aspects of dance presentation

Rhythm
The patterning or structuring of time through movement or sound

See.Think.Wonder
An inquiry-based Visual Thinking Strategy (VTS) used for critical analysis from Harvard

Project Zero, in which children respond to simple questions (What do you see? What do you think? What do you wonder?) which enable a child to begin make meaning from an observed (dance) work of art

Sound Environment
Sound accompaniment for dancing other than music (for example, street noise, ocean surf, bird calls, spoken word)

Space
Components of dance involving direction, pathways, facings, levels, shapes, and design; the location where a dance takes place; the element of dance referring to the cubic area of a room, on a stage, or in other environments

Spatial design
Pre-determined use of directions, levels, pathways, formations, and body shapes

Stimuli
A thing or event that inspires action, feeling, or thought

Style
Dance that has specific movement characteristics, qualities, or principles that give it distinctive identity (for example, Graham technique is a style of Modern Dance; rhythm tap is a style of Percussive Dance; Macedonian folk dance is a style of International Folk dance; Congolese dance is a style of African Dance)

Technical dance skills
The degree of physical proficiency a dancer achieves within a dance style or technique (for example, coordination, form, strength, speed and range)

Tempi
Different paces or speeds of music, or underlying beats or pulses, used in a dance work or composition (singular: tempo)

Tempo
The pace or speed of a pulse or beat underlying music or movement (plural: tempi or tempos)

Theme
A dance idea that is stated choreographically

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~~IDAHO CONTENT STANDARDS~~
~~GRADE K-3~~
~~HUMANITIES: THEATRE~~

~~Standard 1: Historical and Cultural Contexts~~

~~Students demonstrate an understanding of how people and cultures are connected across time. Humanities instruction prepares students to work and live as global citizens because of their greater understanding of their own culture and the cultures of others.~~

~~Students in grades K-3 identify elements of theatre, cultural traditions, time periods, ideas, and emotions as expressed through theatre. Students compare written stories to dramatic performances.~~

~~Goal 1.1: Identify the historical and cultural contexts of theatre.~~

~~Objective(s): By the end of Grade 3, the student will be able to:~~

~~K-3.T.1.1.1 Identify a dramatic presentation as belonging to the past or present.~~
~~K-3.T.1.1.2 Identify elements of theatre in everyday life, such as relationships (characters), clothes (costumes), locations (setting), and plot (story).~~
~~K-3.T.1.1.3 Identify and discuss cultural traditions in stories, songs, fairy tales, fables, and nursery rhymes.~~

~~Goal 1.2: Identify the interrelationships among the visual and performing arts disciplines.~~

~~Objective(s): By the end of Grade 3, the student will be able to:~~

~~K-3.T.1.2.1 Dramatize how theatre is enhanced by dance, visual art, and music.~~
~~K-3.T.1.2.2 Compare a written (oral) story with a dramatic performance of that same story.~~

~~Standard 2: Critical Thinking~~

~~Students understand the purposes and functions of the arts. They build literacy and develop critical thinking through analysis and interpretation.~~

~~Students in grades K-3 identify and discuss the elements and meaning of a dramatic performance, using theatre vocabulary. Students explain personal preference about a dramatic performance.~~

~~Goal 2.1: Conduct analyses of theatre.~~

~~Objective(s): By the end of Grade 3, the student will be able to:~~

~~K-3.T.2.1.1 Use theatre vocabulary to discuss a dramatic performance.~~
~~K-3.T.2.1.2 Identify and describe the character, plot, and setting in stories. K-~~
~~3.T.2.1.3 Use drama as a form of communication.~~

~~Goal 2.2: Exercise sound reasoning in understanding and making choices about theatre.~~

~~**Objective(s): By the end of Grade 3, the student will be able to:**~~

~~K-3.T.2.2.1 Identify the beginning, middle, and ending of dramatic performances.~~
~~K-3.T.2.2.2 Verbalize personal preferences for various types of drama.~~
~~K-3.T.2.2.3 Express preferences for the various aspects of a dramatic performance.~~
~~K-3.T.2.2.4 Explain the importance of theatre in one's own life.~~

~~**Standard 3:Performance**~~

~~Students engage in the creation of original works and/or the interpretation of the works of others, culminating in a performance or presentation.~~

~~Students in grades K-3 create and present dramatic performances based on personal experience, imagination, and factual events. Students use theatrical skills to create different characters, scenes, and dialogue. Students employ the elements of scenery, props, costume, and makeup in a dramatic performance.~~

~~**Goal 3.1: Utilize concepts essential to theatre.**~~

~~**Objective(s): By the end of Grade 3, the student will be able to:**~~

~~K-3.T.3.1.1 Create characters, environments, and situations for dramatization.~~
~~K-3.T.3.1.2 Vary movement, vocal pitch, tempo, and tone for different characters.~~

~~**Goal 3.2: Communicate through theatre, applying artistic concepts, knowledge, and skills.**~~

~~**Objective(s): By the end of Grade 3, the student will be able to:**~~

~~K-3.T.3.2.1 Use dialogue to tell stories~~
~~K-3.T.3.2.2 Interact in imaginary situations.~~
~~K-3.T.3.2.3 Choose scenery, props, costumes, and makeup for a production.~~
~~K-3.T.3.2.4 Demonstrate appropriate behavior while attending and/or participating in theatrical events.~~
~~K-3.T.3.2.5 Show respect for personal work and works of others.~~

~~**Goal 3.3: Communicate through theatre with creative expression.**~~

~~**Objective(s): By the end of Grade 3, the student will be able to:**~~

~~K-3.T.3.3.1 Create spontaneous dialogue to express or create characters in a scene.~~
~~K-3.T.3.3.2 Create and present original or fictional stories.~~
~~K-3.T.3.3.3 Assume roles based on personal experiences, imagination, and reading.~~

~~IDAHO CONTENT STANDARDS~~
~~GRADE 4-5~~
~~HUMANITIES: THEATRE~~

~~Students are expected to know content and apply skills from previous grades.~~

~~Standard 1:~~ ~~Historical and Cultural Contexts~~

~~Students demonstrate an understanding of how people and cultures are connected across time. Humanities instruction prepares students to work and live as global citizens because of their greater understanding of their own culture and the cultures of others.~~

~~Students in grades 4-5 portray historical events and various cultures using theatrical elements. Students discuss theatre as a means of reflecting history and culture. Students analyze the interrelationships of the arts in a live performance.~~

~~Goal 1.1: Identify the historical and cultural contexts of theatre.~~

~~Objective(s): By the end of Grade 5, the student will be able to:~~

- ~~4-5.T.1.1.1 Translate a specific historical event into a dramatic presentation.~~
- ~~4-5.T.1.1.2 Create stage props and scenery that convey historical accuracy in a dramatic reenactment.~~
- ~~4-5.T.1.1.3 Create dialogue involving historical figures.~~
- ~~4-5.T.1.1.4 Identify the value of theatre as a means of reflecting history and culture.~~

~~Goal 1.2: Identify the interrelationships among the visual and performing arts disciplines.~~

~~Objective(s): By the end of Grade 5, the student will be able to:~~

- ~~4-5.T.1.2.1 Analyze the ways a live performance is enhanced by the integration of visual art, music, and dance.~~
- ~~4-5.T.1.2.2 Utilize multiple art forms to communicate ideas effectively.~~

~~Standard 2: Critical Thinking~~

~~Students understand the purposes and functions of the arts. They build literacy and develop critical thinking through analysis and interpretation.~~

~~Students in grades 4-5 use selected criteria to critique performances and justify reasons for personal preferences. Students discuss and analyze the themes and elements of theatre. Students identify and describe the character, plot, and setting in classroom dramatizations and/or formal productions.~~

~~Goal 2.1: Conduct analyses of theatre.~~

~~Objective(s): By the end of Grade 5, the student will be able to:~~

- ~~4-5.T.2.1.1 Develop and use theatre vocabulary.~~
- ~~4-5.T.2.1.2 Compare and contrast film, television, and theatre as distinct genres.~~

~~4-5.T.2.1.3 Examine theatre as a means to communicate meaning.~~
~~4-5.T.2.1.4 Justify reasons for personal preference concerning a dramatic performance.~~

~~Goal 2.2: Exercise sound reasoning and understanding in making choices about theatre.~~

~~Objective(s): By the end of Grade 5, the student will be able to:~~
~~4-5.T.2.2.1 Identify and describe the character, plot, and setting in classroom dramatizations and/or formal productions.~~
~~4-5.T.2.2.2 Analyze how facial expression and body language reveal meaning.~~
~~4-5.T.2.2.3 Evaluate one's own performance of a scene and the performances of others.~~
~~4-5.T.2.2.4 Identify how theatre reveals universal themes.~~
~~4-5.T.2.2.5 Explain the importance of theatre in our society.~~

~~Standard 3: Performance~~

~~Students engage in the creation of original works and/or the interpretation of the works of others, culminating in a performance or presentation.~~

~~Students in grades 4-5 improvise and create dramatizations based on a variety of sources. Students use theatrical elements to convey mood and environment. Students collaborate to produce original and retold narratives. Students show respect for their work and the work of others.~~

~~Goal 3.1: Utilize concepts essential to theatre.~~

~~Objective(s): By the end of Grade 5, the student will be able to:~~
~~4-5.T.3.1.1 Improvise dialogue to tell stories and convey information.~~
~~4-5.T.3.1.2 Vary movements, vocal pitch, tempo, and tone for different characters.~~
~~4-5.T.3.1.3 Create characters, environments, and situations for dramatization.~~

~~Goal 3.2: Communicate through theatre, applying artistic concepts, knowledge, and skills.~~

~~Objective(s): By the end of Grade 5, the student will be able to:~~
~~4-5.T.3.2.1 Use appropriate improvised or scripted dialogue in a scene.~~
~~4-5.T.3.2.2 Demonstrate basic stage movement.~~
~~4-5.T.3.2.3 Create scenery, properties, lighting, sound, costumes, and makeup for a dramatic production.~~
~~4-5.T.3.2.4 Demonstrate appropriate behavior while attending and/or participating in theatrical events.~~
~~4-5.T.3.2.5 Show respect for personal work and works of others.~~

~~Goal 3.3: Communicate through theatre with creative expression.~~

~~Objective(s): By the end of Grade 5, the student will be able to:~~
~~4-5.T.3.3.1 Create characters and plots from a variety of sources.~~
~~4-5.T.3.3.2 Create a short dramatic scene from narrative literature.~~
~~4-5.T.3.3.3 Improvise scenes collaboratively, based on relationships and social situations.~~

~~IDAHO CONTENT STANDARDS~~
~~GRADE 6-8~~
~~HUMANITIES: THEATRE~~

~~**Students are expected to know content and apply skills from previous grades.**~~

~~**Standard 1:** Historical and Cultural Contexts~~

~~Students demonstrate an understanding of how people and cultures are connected across time. Humanities instruction prepares students to work and live as global citizens because of their greater understanding of their own culture and the cultures of others.~~

~~Students in grades 6-8 identify and discuss the historical roots of theatre. Students distinguish between different types of acting and identify ways various cultures have used theatre to communicate ideas. Students use and analyze the use of multiple art forms in theatre.~~

~~**Goal 1.1:Examine the historical and cultural contexts of theatre.**~~

~~**Objective(s): By the end of Grade 8, the student will be able to:**~~
~~6-8.T.1.1.1 Investigate theatre's Greek roots.~~
~~6-8.T.1.1.2 Identify the ways in which many cultures have used theatre to communicate ideas.~~
~~6-8.T.1.1.3 Compare and contrast various historical changes and developments in the theatre and stage.~~
~~6-8.T.1.1.4 Delineate the differences among various acting styles, genres, and time periods.~~

~~**Goal 1.2: Explain the interrelationships among the visual and performing arts disciplines.**~~

~~**Objective(s): By the end of Grade 8, the student will be able to:**~~
~~6-8.T.1.2.1 Analyze how other art forms contribute to a dramatic performance.~~
~~6-8.T.1.2.2 Utilize multiple art forms to communicate ideas effectively.~~

~~**Standard 2: Critical Thinking**~~

~~Students understand the purposes and functions of the arts. They build literacy and develop critical thinking through analysis and interpretation.~~

~~Students in grades 6-8 compare and contrast theatre of different cultures. Students identify and discuss dramatic elements in a work. Students formulate and defend personal preferences about dramatic performances. Students use theatrical vocabulary to discuss a performance. Students analyze a character's role, actions, and the consequences for actions.~~

~~**Goal 2.1: Conduct analyses of theatre.**~~

~~**Objective(s): By the end of Grade 8, the student will be able to:**~~
~~6-8.T.2.1.1 Use theatrical vocabulary to critique a dramatic performance.~~
~~6-8.T.2.1.2 Analyze the central action of the play and discuss its cause and effect.~~

~~6-8.T.2.1.3 Identify the theatrical elements that contribute to the meaning of a dramatic work.~~
~~6-8.T.2.1.4 Compare one's interpretation of a dramatic scene with the interpretations of others.~~
~~6-8.T.2.1.5 Compare and contrast the theatre of different cultures.~~

~~Goal 2.2: Exercise sound reasoning and understanding in making choices about theatre.~~

~~Objective(s): By the end of Grade 8, the student will be able to:~~
~~6-8.T.2.2.1 Describe the role of the protagonist and the antagonist in a dramatic performance.~~
~~6-8.T.2.2.2 Recognize the elements of conflict, climax, and theme as they relate to theatrical texts.~~
~~6-8.T.2.2.3 Defend one's personal preferences for the various aspects of a dramatic work.~~
~~6-8.T.2.2.4 Utilize drama as a study of human character and personality.~~
~~6-8.T.2.2.5 Identify roles of professional and amateur performers and theatre technicians in our society.~~
~~6-8.T.2.2.6 Explain how lighting, sets, and costumes can create meaning in a dramatic performance.~~
~~6-8.T.2.2.7 Compare and contrast modern drama with the theatre of earlier periods.~~

~~Standard 3: Performance~~

~~Students engage in the creation of original works and/or the interpretation of the works of others, culminating in a performance or presentation.~~

~~Students in grades 6-8 improvise dialogue and create characters, environments, and situations. Students describe how theatrical and technical elements create meaning in a performance. Students demonstrate basic stage movement and the physical tools for acting. Students use pantomime to tell a story.~~

~~Goal 3.1: Utilize concepts essential to theatre.~~

~~Objective(s): By the end of Grade 8, the student will be able to:~~
~~6-8.T.3.1.1 Improvise dialogue to tell stories and convey information at a personal level.~~
~~6-8.T.3.1.2 Vary movements and vocal qualities to convey an interpretation of a character.~~
~~6-8.T.3.1.3 Create characters, environments, and situations to convey a specific idea or mood.~~

~~Goal 3.2: Communicate through theatre, applying artistic concepts, knowledge, and skills.~~

~~Objective(s): By the end of Grade 8, the student will be able to:~~
~~6-8.T.3.2.1 Use pantomime to communicate an idea or tell a story.~~
~~6-8.T.3.2.2 Demonstrate basic stage movement.~~
~~6-8.T.3.2.3 Create scenery, properties, lighting, sound, costumes, and makeup for a dramatic production.~~
~~6-8.T.3.2.4 Demonstrate appropriate behavior while attending and/or participating in theatrical events.~~
~~6-8.T.3.2.5 Show respect for personal work and works of others.~~

~~6-8.T.3.2.6 Identify and describe how performance and technical elements communicate the meaning and intent of a dramatic presentation.~~
~~6-8.T.3.2.7 Demonstrate the use of physical tools for acting (voice, movement, facial expression, gestures).~~

~~**Goal 3.3: Communicate through theatre with creative expression.**~~

~~**Objective(s): By the end of Grade 8, the student will be able to:**~~
~~6-8.T.3.3.1 Build characters and portray situations through improvisation.~~
~~6-8.T.3.3.2 Create a dramatic work that expresses personal understanding, opinions, or beliefs.~~
~~6-8.T.3.3.3 Plan and direct scripted scenes~~

~~IDAHO CONTENT STANDARDS~~
~~GRADE 9-12~~
~~HUMANITIES: THEATRE~~

~~Students are expected to know content and apply skills from previous grades.~~

~~Standard 1: Historical and Cultural Contexts~~

~~Students demonstrate an understanding of how people and cultures are connected across time. Humanities instruction prepares students to work and live as global citizens because of their greater understanding of their own culture and the cultures of others.~~

~~Students in grades 9-12 identify representative dramatic works from various cultures, historical periods, and theatrical styles. Students describe and compare stock characters and archetypes from various cultures. Students create and analyze the use of other art forms in dramatic performances.~~

~~Goal 1.1: Examine the historical and cultural contexts of theatre.~~

~~Objective(s): By the end of high school, the student will be able to:~~

~~9-12.T.1.1.1 Investigate representative dramatic works from a variety of cultures and historical periods.~~
~~9-12.T.1.1.2 Demonstrate an understanding of cultural and historical perspectives required by a specific script.~~
~~9-12.T.1.1.3 Identify historical periods and their theatrical styles.~~
~~9-12.T.1.1.4 Describe and compare stock characters, archetypes, and universal themes in dramas from various cultures and periods.~~
~~9-12.T.1.1.5 Investigate representative playwrights from a variety of cultures and historical periods.~~

~~Goal 1.2: Identify the interrelationships among the visual and performing arts disciplines.~~

~~Objective(s): By the end of high school, the student will be able to:~~

~~9-12.T.1.2.1 Analyze how other art forms contribute to a dramatic performance.~~
~~9-12.T.1.2.2 Utilize multiple art forms to communicate ideas effectively.~~

~~Standard 2: Critical Thinking~~

~~Students understand the purposes and functions of the arts. They build literacy and develop critical thinking through analysis and interpretation.~~

~~Students in grades 9-12 analyze and critique dramatic performances and written texts, using theatrical vocabulary. Students evaluate the success of a dramatic production with respect to intent and audience. Students analyze the central action of a play and discuss its cause and effect. Students compare and contrast modern drama with theatre of earlier periods.~~

~~Goal 2.1: Conduct analyses of theatre.~~

~~Objective(s): By the end of high school, the student will be able to:~~

~~9-12.T.2.1.1 Develop and use theatre vocabulary to critique dramatic performances or written plays.~~
~~9-12.T.2.1.2 Analyze the central action of the play and discuss its cause and effect.~~
~~9-12.T.2.1.3 Analyze how technical elements can create meaning in a dramatic performance.~~
~~9-12.T.2.1.4 Evaluate how well the dramatic text or production meets its intended objectives.~~
~~9-12.T.2.1.5 Compare and contrast traditional theatre and contemporary trends in entertainment.~~

~~Goal 2.2: Exercise sound reasoning and understanding in making choices about theatre.~~

~~Objective(s): By the end of high school, the student will be able to:~~

~~9-12.T.2.2.1 Recognize the elements of conflict, climax, and theme as they relate to theatrical texts.~~
~~9-12.T.2.2.2 Analyze a character's actions and the consequences they create.~~
~~9-12.T.2.2.3 Develop and defend one's critique of a dramatic performance.~~
~~9-12.T.2.2.4 Utilize drama as a study of human character and personality.~~
~~9-12.T.2.2.5 Analyze production and performance appropriateness of a theatrical work within a given community.~~
~~9-12.T.2.2.6 Analyze how technical elements can create meaning in a dramatic performance.~~
~~9-12.T.2.2.7 Evaluate how theatrical participation is critical to global culture.~~

~~Standard 3: Performance~~

~~Students engage in the creation of original works and/or the interpretation of the works of others, culminating in a performance or presentation.~~

~~Students in grades 9-12 interpret, perform, and create scripts to convey story and meaning to an audience. Students create and sustain character through physical, emotional, and social dimensions. Students interpret and perform a script, respecting the intent of its creator. Students build characters and portray situations through improvisation.~~

~~Goal 3.1: Utilize concepts essential to theatre.~~

~~Objective(s): By the end of high school, the student will be able to:~~

~~9-12.T.3.1.1 Interpret and perform scripts to convey story and meaning to an audience.~~
~~9-12.T.3.1.2 Utilize theatrical terminology in appropriate settings.~~
~~9-12.T.3.1.3 Research and apply physical, emotional, and social dimensions in creating character.~~

~~Goal 3.2: Communicate through theatre, applying artistic concepts, knowledge, and skills.~~

~~Objective(s): By the end of high school, the student will be able to:~~

~~9-12.T.3.2.1 Create imaginative scripts that convey story and meaning to an audience.~~
~~9-12.T.3.2.2 Interpret/perform a work respecting the intent of its creator.~~
~~9-12.T.3.2.3 Plan and utilize technical theatre elements to support a dramatic text.~~
~~9-12.T.3.2.4 Demonstrate appropriate behavior while attending and/or participating in theatrical events.~~
~~9-12.T.3.2.5 Show respect for personal work and works of others.~~
~~9-12.T.3.2.6 Demonstrate how artistic choices can affect performances and formal productions.~~
~~9-12.T.3.2.7 Use theatrical elements to convey mood and environment.~~
~~9-12.T.3.2.8 Create works that integrate processes and concepts of other art forms.~~

~~Goal 3.3: Communicate through theatre with creative expression.~~

~~Objective(s): By the end of high school, the student will be able to:~~

~~9-12.T.3.3.1 Develop and sustain a character that communicates with the audience.~~
~~9-12.T.3.3.2 Create a dramatic work that expresses personal understanding, opinions, or beliefs.~~
~~9-12.T.3.3.3 Organize and conduct rehearsals for production.~~

IDAHO
STATE DEPARTMENT OF EDUCATION

ARTS AND HUMANITIES

THEATRE

Approved by the Idaho State Board of Education, August 11, 2016

K-3 Theatre

Theatre/Creating
#TH:Cr1.1
Process Component: Envision, Conceptualize
Anchor Standard: Generate and conceptualize artistic ideas and work.
Enduring Understanding: Theatre artists rely on intuition, curiosity, and critical inquiry.
Essential Question: What happens when theatre artists use their imaginations and/or learned theatre skills while engaging in creative exploration and inquiry?

Grade K
TH:Cr1.1.K
a. With prompting and support, invent and inhabit an imaginary elsewhere in dramatic play or a guided drama experience (e.g., process drama, story drama, creative drama).
b. With prompting and support, use non-representational materials to create props, puppets, and costume pieces for dramatic play or a guided drama experience (e.g., process drama, story drama, creative drama).

Grade 1
TH:Cr1.1.1
a. Propose potential choices characters could make in a guided drama experience (e.g., process drama, story drama, creative drama).
b. Collaborate with peers to conceptualize costumes and props in a guided drama experience (e.g., process drama, story drama, creative drama).
c. Identify ways in which gestures and movement may be used to create or retell a story in guided drama experiences (e.g., process drama, story drama, creative drama).

Grade 2
TH:Cr1.1.2
a. Propose potential new details to plot and story in a guided drama experience (e.g., process drama, story drama, creative drama).
b. Collaborate with peers to conceptualize scenery in a guided drama experience (e.g., process drama, story drama, creative drama).
c. Identify ways in which voice and sounds may be used to create or retell a story in guided drama experiences (e.g., process drama, story drama, creative drama).

Grade 3
TH:Cr1.1.3
a. Create roles, imagined worlds, and improvised stories in a drama/theatre work.
b. Imagine and articulate ideas for costumes, props and sets for the environment and characters in a drama/theatre work.
c. Collaborate to determine how characters might move and speak to support the story and given circumstances in drama/theatre work.

Theatre/Creating
#TH:Cr2.1

Process Component: Develop
Anchor Standard: Organize and develop artistic ideas and work.
Enduring Understanding: Theatre artists work to discover different ways of communicating meaning.
Essential Question: How, when, and why do theatre artists' choices change?

Grade K
TH:Cr2.1.K
a. With prompting and support, interact with peers and contribute to dramatic play or a guided drama experience (e.g., process drama, story drama, creative drama).
b. With prompting and support, express original ideas in dramatic play or a guided drama experience (e.g., creative drama, process drama, story drama).

Grade 1
TH:Cr2.1.1
a. Contribute to the development of a sequential plot in a guided drama experience (e.g., process drama, story drama, creative drama).
b. With prompting and support, participate in group decision making in a guided drama experience (e.g., process drama, story drama, creative drama).

Grade 2
TH:Cr2.1.2
a. Collaborate with peers to devise meaningful dialogue in a guided drama experience (e.g., process drama, story drama, creative drama).
b. Contribute ideas and make decisions as a group to advance a story in a guided drama experience (e.g., process drama, story drama, creative drama).

Grade 3
TH:Cr2.1.3
a. Participate in methods of investigation to devise original ideas for a drama/theatre work.
b. Compare ideas with peers and make selections that will enhance and deepen group drama/theatre work.

Theatre/Creating
#TH:Cr3.1
Process Component: Rehearse
Anchor Standard: Refine new work through play, drama processes and theatre experiences using critical analysis and experimentation.
Enduring Understanding: Theatre artists refine their work and practice their craft through rehearsal.
Essential Question: How do theatre artists transform and edit their initial ideas?

Grade K
TH:Cr3.1.K
a. With prompting and support, ask and answer questions in dramatic play or a guided drama experience (e.g., process drama, story drama, creative drama).

Grade 1
TH:Cr3.1.1

a. Contribute to the adaptation of the plot in a guided drama experience (e.g., process drama, story drama, creative drama).
b. Identify similarities and differences in sounds and movements in a guided drama experience (e.g., process drama, story drama, creative drama).
c. Collaborate to imagine multiple representations of a single object in a guided drama experience (e.g., process drama, story drama, creative drama).

Grade 2
TH:Cr3.1.2
a. Contribute to the adaptation of dialogue in a guided drama experience (e.g., process drama, story drama, creative drama).
b. Use and adapt sounds and movements in a guided drama experience (e.g., process drama, story drama, creative drama).
c. Generate independently multiple representations of a single object in a guided drama experience (e.g., process drama, story drama, creative drama.

Grade 3
TH:Cr3.1.3
a. Collaborate with peers to revise, refine, and adapt ideas to fit the given parameters of a drama theatre work.
b. Participate and contribute to physical and vocal exploration in an improvised or scripted drama/theatre work.
c. Practice and refine design and technical choices to support a devised or scripted drama/theatre work.

Theatre/Performing
#TH:Pr4.1
Process Component: Select
Anchor Standard: Select, analyze, and interpret artistic work for presentation.
Enduring Understanding: Theatre artists make strong choices to effectively convey meaning.
Essential Question: Why are strong choices essential to interpreting a drama or theatre piece?

Grade K
TH:Pr4.1.K
With prompting and support, identify characters and setting in dramatic play or a guided drama experience (e.g., process drama, story drama, creative drama).

Grade 1
TH:Pr4.1.1
a. Describe a story's character actions and dialogue in a guided drama experience (e.g., process drama, story drama, creative drama).
b. Use body, face, gestures, and voice to communicate character traits and emotions in a guided drama experience (e.g., process drama, story drama, creative drama).

Grade 2
TH:Pr4.1.2

a. Interpret story elements in a guided drama experience (e.g., process drama, story drama, creative drama).
b. Alter voice and body to expand and articulate nuances of a character in a guided drama experience (e.g., process drama, story drama, creative drama).

Grade 3
TH:Pr4.1.3
a. Apply the elements of dramatic structure to a story and create a drama/theatre work.
b. Investigate how movement and voice are incorporated into drama/theatre work.

Theatre/Performing
#TH:Pr5.1
Process Component: Prepare
Anchor Standard: Develop and refine artistic techniques and work for presentation.
Enduring Understanding: Theatre artists develop personal processes and skills for a performance or design.
Essential Question: What can I do to fully prepare a performance or technical design?

Grade K
TH:Pr5.1.K
a. With prompting and support, understand that voice and sound and sound are fundamental to dramatic play and guided dramatic experiences (e.g., process drama, story drama, creative drama).
b. with prompting and support, explore and experiment with various technical elements in dramatic play or a guided dramatic experience (e.g. process drama, story drama, creative drama).

Grade 1
TH:Pr5.1.1
a. With prompting and support, identify and understand that physical movement is fundamental to guided drama experiences (e.g., process drama, story drama, creative drama).
b. With prompting and support, identify technical elements that can be used in a guided drama experience (e.g., process drama, story drama, creative drama).

Grade 2
TH:Pr5.1.2
a. Demonstrate the relationship between and among body, voice, and mind in a guided drama experience (e.g., process drama, story drama, creative drama).
b. Explore technical elements in a guided drama experience (e.g., process drama, story drama, creative drama).

Grade 3
TH:Pr4.1.3
a. Apply the elements of dramatic structure to a story and create a drama/theatre work.
b. Investigate how movement and voice are incorporated into drama/theatre work.

Theatre/Performing
#TH:Pr6.1
Process Component: Share, Present
Anchor Standard: Convey meaning through the presentation of artistic work.
Enduring Understanding: Theatre artists share and present stories, ideas, and envisioned worlds to explore the human experience.
Essential Question: What happens when theatre artists and audiences share a creative experience?

Grade K
TH:Pr6.1.K
With prompting and support, use voice and sound in dramatic play or a guided drama experience (e.g., process drama, story drama, creative drama).

Grade 1
TH:Pr6.1.1
With prompting and support, use movement and gestures to communicate emotions in a guided drama experience (e.g., process drama, story drama, creative drama).

Grade 2
TH:Pr6.1.2
Contribute to group guided drama experiences (e.g., process drama, story drama, creative drama) and informally share with peers.

Grade 3
TH:Pr6.1.3
Practice drama/theatre work and share reflections individually and in small groups.

Theatre/Responding
#TH:Re7.1
Process Component: Reflect
Anchor Standard: Perceive and analyze artistic work.
Enduring Understanding: Theatre artists reflect to understand the impact of drama processes and theatre experiences.
Essential Question: How do theatre artists comprehend the essence of drama processes and theatre experiences?

Grade K
TH:Re7.1.K
With prompting and support, express an emotional response to characters in dramatic play or a guided drama experience (e.g., process drama, story drama, creative drama).

Grade 1
TH:Re7.1.1
Recall choices made in a guided drama experience (e.g., process drama, story drama, creative drama).

Grade 2

TH:Re7.1.2
Recognize when artistic choices are made in a guided drama experience (e.g., process drama, story drama, creative drama).

Grade 3
TH:Re7.1.3
Understand why artistic choices are made in a drama/theatre work.

Theatre/Responding
#TH:Re8.1
Process Component: Interpret
Anchor Standard: Interpret intent and meaning in artistic work.
Enduring Understanding: Theatre artists' interpretations of drama/theatre work are influenced by personal experiences and aesthetics.
Essential Question: How can the same work of art communicate different messages to different people?

Grade K
TH:Re8.1.K
a. With prompting and support, identify preferences in dramatic play, a guided drama experience (e.g., process drama, story drama, creative drama), or age-appropriate theatre performance.
b. With prompting and support, name and describe settings in dramatic play or a guided drama experience (e.g., process drama, story drama, creative drama).

Grade 1
TH:Re8.1.1
a. Explain preferences and emotions in a guided drama experience (e.g., process drama, story drama, creative drama), or age-appropriate theatre performance.
b. Identify causes of character actions in a guided drama experience (e.g., process drama, story drama, or creative drama).Explain or use text and pictures to describe how personal emotions and choices compare to the emotions and choices of characters in a guided drama experience (e.g., process drama, story drama, creative dram).

Grade 2
TH:Re8.1.2
a. Explain how personal preferences and emotions affect an observer's response in a guided drama experience (e.g., process drama, story drama, creative drama), or age-appropriate theatre performance.
b. Identify causes and consequences of character actions in a guided drama experience (e.g., process drama, story drama, or creative drama).
c. Explain or use text and pictures to describe how others' emotions and choices may compare to the emotions and choices of characters in a guided drama experience (e.g., process drama, story drama, creative drama).

Grade 3
TH:Re8.1.3

a. Consider multiple personal experiences when participating in or observing a drama/theatre work.
b. Consider multiple ways to develop a character using physical characteristics and prop or costume design choices that reflect cultural perspectives in drama/theatre work.
c. Examine how connections are made between oneself and a character's emotions in drama/theatre work.

Theatre/Responding
#TH:Re9.1
Process Component: Evaluate
Anchor Standard: Apply criteria to evaluate artistic work.
Enduring Understanding: Theatre artists apply criteria to investigate, explore, and assess drama and theatre work.
Essential Question: How are the theatre artist's processes and the audience's perspectives impacted by analysis and synthesis?

Grade K
TH:Re9.1.K
With prompting and support, actively engage with others in dramatic play or a guided drama experience (e.g., process drama, story drama, creative drama).

Grade 1
TH:Re9.1.1
a. Build on others' ideas in a guided drama experience (e.g., process drama, story drama, creative drama).
b. Identify props and costumes that might be used in a guided drama experience (e.g., process drama, story drama, creative drama).
c. Compare and contrast the experiences of characters in a guided drama experience (e.g., process drama, story drama, creative drama).

Grade 2
TH:Re9.1.2
a. Collaborate on a scene in a guided drama experience (e.g., process drama, story drama, creative drama).
b. Use a prop or costume in a guided drama experience (e.g., process drama, story drama, creative drama) to describe characters, settings, or events.
c. Describe how characters respond to challenges in a guided drama experience (e.g., process drama, story drama, creative drama).

Grade 3
TH:Re9.1.3
a. Understand how and why groups evaluate drama/theatre work.
b. Consider and analyze technical elements from multiple drama/theatre works.
c. Evaluate and analyze problems and situations in a drama/theatre work from an audience perspective.

Theatre/Connecting
#TH:Cn10.1
Process Component: Empathize
Anchor Standard: Synthesize and relate knowledge and personal experiences to make art.
Enduring Understanding: Theatre artists allow awareness of interrelationships between self and others to influence and inform their work.
Essential Question: What happens when theatre artists foster understanding between self and others through critical awareness, social responsibility, and the exploration of empathy?

Grade K
TH:Cn10.1.K
a. With prompting and support, identify similarities between characters and oneself in dramatic play or a guided drama experience (e.g., process drama, story drama, creative drama).

Grade 1
TH:Cn10.1.1
a. Identify character emotions in a guided drama experience (e.g., process drama, story drama, creative drama) and relate it to personal experience.

Grade 2
TH:Cn10.1.2
Relate character experiences to personal experiences in a guided drama experience (e.g., process drama, story drama, creative drama).

Grade 3
TH:Cn10.1.3
Use personal experiences and knowledge to make connections to community and culture in a drama/theatre work.

Theatre/Connecting
#TH:Cn11.1
Process Component: Interrelate
Anchor Standard: Relate artistic ideas and works with societal, cultural, and historical context to deepen understanding.
Enduring Understanding: Theatre artists understand and can communicate their creative process as they analyze the way the world may be understood.
Essential Question: What happens when theatre artists allow an understanding of themselves and the world to inform perceptions about theatre and the purpose of their work?

Grade K
TH:Cn11.1.K
With prompting and support, identify skills and knowledge from other areas in dramatic play or a guided drama experience (e.g., process drama, story drama, creative drama).

Grade 1
TH:Cn11.1.1

Apply skills and knowledge from different art forms and content areas in a guided drama experience (e.g., process drama, story drama, creative drama).

Grade 2
TH:Cn11.1.2
Determine appropriate skills and knowledge from different art forms and content areas to apply in a guided drama experience (e.g., process drama, story drama, creative drama).

Grade 3
TH:Cn11.1.3
Identify connections to community, social issues and other content areas in drama/theatre work.

Theatre/Connecting
#TH:Cn11.2
Process Component: Research
Anchor Standard: Relate artistic ideas and works with societal, cultural, and historical context to deepen understanding.
Enduring Understanding: Theatre artists critically inquire into the ways others have thought about and created drama processes and productions to inform their own work.
Essential Question: In what ways can research into theatre histories, theories, literature, and performances alter the way a drama process or production is understood?

Grade K
TH:Cn11.2.K
a. With prompting and support, identify stories that are different from one another in dramatic play or a guided drama experience (e.g., process drama, story drama, creative drama).
b. With prompting and support, tell a short story in dramatic play or a guided drama experience (e.g., process drama, story drama, creative drama).

Grade 1
TH:Cn11.2.1
a. Identify similarities and differences in stories from one's own community in a guided drama experience (e.g., process drama, story drama, creative drama).
b. Collaborate on the creation of a short scene based on a fictional literary source in a guided drama experience (e.g., process drama, story drama, creative drama).

Grade 2
TH:Cn11.2.2
a. Identify similarities and differences in stories from multiple cultures in a guided drama experience (e.g., process drama, story drama, creative drama).
b. Collaborate on the creation of a short scene based on a non-fiction literary source in a guided drama experience (e.g., process drama, story drama, creative drama).

Grade 3
TH:Cn11.2.3

a. Explore how stories are adapted from literature to drama/theatre work.
b. Examine how artists have historically presented the same stories using different art forms, genres, or drama/theatre conventions.

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4-5 Theatre

Theatre/Creating
#TH:Cr1.1
Process Component: Envision, Conceptualize
Anchor Standard: Generate and conceptualize artistic ideas and work.
Enduring Understanding: Theatre artists rely on intuition, curiosity, and critical inquiry.
Essential Question: What happens when theatre artists use their imaginations and/or learned theatre skills while engaging in creative exploration and inquiry?

Grade 4
TH:Cr1.1.4
a. Articulate the visual details of imagined worlds, and improvised stories that support the given circumstances in a drama/theatre work.
b. Visualize and design technical elements that support the story and given circumstances in a drama/theatre work.
c. Imagine how a character might move to support the story and given circumstances in a drama/theatre work.

Grade 5
TH:Cr1.1.5
a. Identify physical qualities that might reveal a character's inner traits in the imagined world of a drama/theatre work.
b. Propose design ideas that support the story and given circumstances in a drama/theatre work.
c. Imagine how a character's inner thoughts impact the story and given circumstances in a drama/ theatre work.

Theatre/Creating
#TH:Cr2.1
Process Component: Develop
Anchor Standard: Organize and develop artistic ideas and work.
Enduring Understanding: Theatre artists work to discover different ways of communicating meaning
Essential Question: How, when, and why do theatre artists' choices change?

Grade 4
TH:Cr2.1.4
a. Collaborate to devise original ideas for a drama/theatre work by asking questions about characters and plots.
b. Make and discuss group decisions and identify responsibilities required to present a drama/theatre work to peers.

Grade 5
TH:Cr2.1.5
a. Devise original ideas for a drama/theatre work that reflect collective inquiry about characters and their given circumstances.

b. Participate in defined responsibilities required to present a drama/theatre work informally to an audience.

Theatre/Creating
#TH:Cr3.1
Process Component: Rehearse
Anchor Standard: Refine new work through play, drama processes and theatre experiences using critical analysis and experimentation.
Enduring Understanding: Theatre artists refine their work and practice their craft through rehearsal.
Essential Question: How do theatre artists transform and edit their initial ideas?

Grade 4
TH:Cr3.1.4
a. Revise and improve an improvised or scripted drama/theatre work through repetition and collaborative review.
b. Develop physical and vocal exercise techniques for an improvised or scripted drama/theatre work.
c. Collaborate on solutions to design and technical problems that arise in rehearsal for a drama/theatre work.

Grade 5
TH:Cr3.1.5
a. Revise and improve an improvised or scripted drama/theatre work through repetition and self-review.
b. Use physical and vocal exploration for character development in an improvised or scripted drama/theatre work.
c. Create innovative solutions to design and technical problems that arise in rehearsal for a drama/theatre work.

Theatre/Performing
#TH:Pr4.1
Process Component: Select
Anchor Standard: Select, analyze, and interpret artistic work for presentation.
Enduring Understanding: Theatre artists make strong choices to effectively convey meaning.
Essential Question: Why are strong choices essential to interpreting a drama or theatre piece?

Grade 4
TH:Pr4.1.4
a. Modify the dialogue and action to change the story in a drama/theatre work.
b. Make physical choices to develop a character in a drama/theatre work.

Grade 5
TH:Pr4.1.5
a. Describe the underlying thoughts and emotions that create dialogue and action in a drama/theatre work.
b. Use physical choices to create meaning in a drama/theatre work.

Theatre/Performing
#TH:Pr5.1
Process Component: Prepare
Anchor Standard: Develop and refine artistic techniques and work for presentation.
Enduring Understanding: Theatre artists develop personal processes and skills for a performance or design.
Essential Question: What can I do to fully prepare a performance or technical design?

Grade 4
TH:Pr5.1.4
a. Practice selected exercises that can be used in a group setting for drama/theatre work.
b. Propose the use of technical elements in a drama/theatre work.

Grade 5
TH:Pr5.1.5
a. Choose acting exercises that can be applied to a drama/theatre work.
b. Demonstrate the use of technical elements in a drama/theatre work.

Theatre/Performing
#TH:Pr6.1
Process Component: Share, Present
Anchor Standard: Convey meaning through the presentation of artistic work.
Enduring Understanding: Theatre artists share and present stories, ideas, and envisioned worlds to explore the human experience.
Essential Question: What happens when theatre artists and audiences share a creative experience?

Grade 4
TH:Pr6.1.4
Share small-group drama/theatre work, with peers as audience.

Grade 5
TH:Pr6.1.5
Present drama/theatre work informally to an audience.

Theatre/Responding
#TH:Re7.1
Process Component: Reflect
Anchor Standard: Perceive and analyze artistic work.
Enduring Understanding: Theatre artists reflect to understand the impact of drama processes and theatre experiences.
Essential Question: How do theatre artists comprehend the essence of drama processes and theatre experiences?

Grade 4
TH:Re7.1.4

Identify artistic choices made in a drama/theatre work through participation and observation.

Grade 5
TH:Re7.1.5
Explain personal reactions to artistic choices made in a drama/theatre work through participation and observation.

Theatre/Responding
#TH:Re8.1
Process Component: Interpret
Anchor Standard: Interpret intent and meaning in artistic work.
Enduring Understanding: Theatre artists' interpretations of drama/theatre work are influenced by personal experiences and aesthetics.
Essential Question: How can the same work of art communicate different messages to different people?

Grade 4
TH:Re8.1.4
a. Compare and contrast multiple personal experiences when participating in or observing a drama/theatre work.
b. Compare and contrast the qualities of characters in a drama/theatre work through physical characteristics and prop or costume design choices that reflect cultural perspectives.
c. Identify and discuss physiological changes connected to emotions in drama/ theatre work.

Grade 5
TH:Re8.1.5
a. Justify responses based on personal experiences when participating in or observing a drama/theatre work.
b. Explain responses to characters based on cultural perspectives when participating in or observing drama/theatre work.
c. Investigate the effects of emotions on posture, gesture, breathing, and vocal intonation in a drama/theatre work.

Theatre/Responding
#TH:Re9.1
Process Component: Evaluate
Anchor Standard: Apply criteria to evaluate artistic work.
Enduring Understanding: Theatre artists apply criteria to investigate, explore, and assess drama and theatre work.
Essential Question: How are the theatre artist's processes and the audience's perspectives impacted by analysis and synthesis?

Grade 4
TH:Re9.1.4
a. Propose a plan to evaluate drama/theatre work.
b. Investigate how technical elements may support a theme or idea in a drama/theatre work.

c. Observe how a character's choices impact an audience's perspective in a drama/theatre work.

Grade 5
TH:Re9.1.5
a. Develop and implement a plan to evaluate drama/theatre work.
b. Assess how technical elements represent the theme of a drama/theatre work.
c. Recognize how a character's circumstances impact an audience's perspective in a drama/theatre work.

Theatre/Connecting
#TH:Cn10.1
Process Component: Empathize
Anchor Standard: Synthesize and relate knowledge and personal experiences to make art.
Enduring Understanding: Theatre artists allow awareness of interrelationships between self and others to influence and inform their work.
Essential Question: What happens when theatre artists foster understanding between self and others through critical awareness, social responsibility, and the exploration of empathy?

Grade 4
TH:Cn10.1.4
Identify the ways drama/theatre work reflects the perspectives of a community or culture.

Grade 5
TH:Cn10.1.5
Explain how drama/theatre connects oneself to a community or culture.

Theatre/Connecting
#TH:Cn11.1
Process Component: Interrelate
Anchor Standard: Relate artistic ideas and works with societal, cultural, and historical context to deepen understanding.
Enduring Understanding: Theatre artists understand and can communicate their creative process as they analyze the way the world may be understood.
Essential Question: What happens when theatre artists allow an understanding of themselves and the world to inform perceptions about theatre and the purpose of their work?

Grade 4
TH:Cn11.1.4
Respond to community and social issues and incorporate other content areas in drama/theatre work.

Grade 5
TH:Cn11.1.5
Investigate historical, global and social issues expressed in drama/theatre work.

Theatre/Connecting
#TH:Cn11.2
Process Component: Research
Anchor Standard: Relate artistic ideas and works with societal, cultural, and historical context to deepen understanding.
Enduring Understanding: Theatre artists critically inquire into the ways others have thought about and created drama processes and productions to inform their own work.
Essential Question: In what ways can research into theatre histories, theories, literature, and performances alter the way a drama process or production is understood?

Grade 4
TH:Cn11.2.4
a. Investigate cross-cultural approaches to storytelling in drama/theatre work.
b. Compare the drama/theatre conventions of a given time period with those of the present.

Grade 5
TH:Cn11.2.5
a. Analyze commonalities and differences between stories set in different cultures in preparation for a drama/theatre work.
b. Identify historical sources that explain drama/theatre terminology and conventions.

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6-8 Theatre

Theatre/Creating
#TH:Cr1.1
Process Component: Envision, Conceptualize
Anchor Standard: Generate and conceptualize artistic ideas and work.
Enduring Understanding: Theatre artists rely on intuition, curiosity, and critical inquiry.
Essential Question: What happens when theatre artists use their imaginations and/or learned theatre skills while engaging in creative exploration and inquiry?

Grade 6
TH:Cr1.1.6
a. Identify possible solutions to staging challenges in a drama/theatre work.
b. Identify solutions to design challenges in a drama/theatre work.
c. Explore a scripted or improvised character by imagining the given circumstances in a drama/theatre work.

Grade 7
TH:Cr1.1.7
a. Investigate multiple perspectives and solutions to staging challenges in a drama/theatre work.
b. Explain and present solutions to design challenges in a drama/ theatre work.
c. Envision and describe a scripted or improvised character's inner thoughts and objectives in a drama/theatre work.

Grade 8
TH:Cr1.1.8
a. Imagine and explore multiple perspectives and solutions to staging problems in a drama/ theatre work.
b. Imagine and explore solutions to design challenges of a performance space in a drama/theatre work.
c. Develop a scripted or improvised character by articulating the character's inner thoughts, objectives, and motivations in a drama/theatre work.

Theatre/Creating
#TH:Cr2.1
Process Component: Develop
Anchor Standard: Organize and develop artistic ideas and work.
Enduring Understanding: Theatre artists work to discover different ways of communicating meaning
Essential Question: How, when, and why do theatre artists' choices change?

Grade 6
TH:Cr2.1.6
a. Use critical analysis to improve, refine, and evolve original ideas and artistic choices in a devised or scripted drama/theatre work.
b. Contribute ideas and accept and incorporate the ideas of others in preparing or devising drama/theatre work.

Grade 7
TH:Cr2.1.7
a. Examine and justify original ideas and artistic choices in a drama/theatre work based on critical analysis, background knowledge, and historical and cultural context.
b. Demonstrate mutual respect for self and others and their roles in preparing or devising drama/theatre work.

Grade 8
TH:Cr2.1.8
a. Articulate and apply critical analysis, background knowledge, research, and historical and cultural context to the development of original ideas for a drama/theatre work.
b. Share leadership and responsibilities to develop collaborative goals when preparing or devising drama/theatre work.

Theatre/Creating
#TH:Cr3.1
Process Component: Rehearse
Anchor Standard: Refine new work through play, drama processes and theatre experiences using critical analysis and experimentation.
Enduring Understanding: Theatre artists refine their work and practice their craft through rehearsal.
Essential Question: How do theatre artists transform and edit their initial ideas?

Grade 6
TH:Cr3.1.6
a. Articulate and examine choices to refine a devised or scripted drama/theatre work.
b. Identify effective physical and vocal traits of characters in an improvised or scripted drama/theatre work.
c. Explore a planned technical design during the rehearsal process for a devised or scripted drama/theatre work.

Grade 7
TH:Cr3.1.7
a. Demonstrate focus and concentration in the rehearsal process to analyze and refine choices in a devised or scripted drama/theatre work.
b. Develop effective physical and vocal traits of characters in an improvised or scripted drama/theatre work.
c. Consider multiple planned technical design elements during the rehearsal process for a devised or scripted drama/theatre work.

Grade 8
TH:Cr3.1.8
a. Use repetition and analysis in order to revise devised or scripted drama/theatre work.
b. Refine effective physical, vocal, and physiological traits of characters in an improvised or scripted drama/ theatre work.
c. Implement and refine a planned technical design using simple technology during the rehearsal process for devised or scripted drama/ theatre work.

Theatre/Performing
#TH:Pr4.1
Process Component: Select
Anchor Standard: Select, analyze, and interpret artistic work for presentation.
Enduring Understanding: Theatre artists make strong choices to effectively convey meaning.
Essential Question: Why are strong choices essential to interpreting a drama or theatre piece?

Grade 6
TH:Pr4.1.6
a. Identify the essential events in a story or script that make up the dramatic structure in a drama/theatre work.
b. Experiment with various physical choices to communicate character in a drama/theatre work.

Grade 7
TH:Pr4.1.7
a. Consider various staging choices to enhance the story in a drama/theatre work.
b. Use various character objectives in a drama/theatre work.

Grade 8
TH:Pr4.1.8
a. Explore different pacing to better communicate the story in a drama/theatre work.
b. Use various character objectives and tactics in a drama/theatre work to overcome an obstacle.

Theatre/Performing
#TH:Pr5.1
Process Component: Prepare
Anchor Standard: Develop and refine artistic techniques and work for presentation.
Enduring Understanding: Theatre artists develop personal processes and skills for a performance or design.
Essential Question: What can I do to fully prepare a performance or technical design?

Grade 6
TH:Pr5.1.6
a. Recognize how acting exercises and techniques can be applied to a drama/theatre work.
b. Articulate how technical elements are integrated into a drama/ theatre work.

Grade 7
TH:Pr5.1.7
a. Participate in a variety of acting exercises and techniques that can be applied in a rehearsal or drama/theatre performance.
b. Choose a variety of technical elements that can be applied to a design in a drama/theatre work.

Grade 8

TH:Pr5.1.8
a. Use a variety of acting techniques to increase skills in a rehearsal or drama/theatre performance.
b. Use a variety of technical elements to create a design for a rehearsal or drama/theatre production.

Theatre/Performing
#TH:Pr6.1
Process Component: Share, Present
Anchor Standard: Convey meaning through the presentation of artistic work.
Enduring Understanding: Theatre artists share and present stories, ideas, and envisioned worlds to explore the human experience.
Essential Question: What happens when theatre artists and audiences share a creative experience?

Grade 6
TH:Pr6.1.6
Adapt a drama/theatre work and present it informally for an audience.

Grade 7
TH:Pr6.1.7
Participate in rehearsals for a drama/theatre work that will be shared with an audience.

Grade 8
TH:Pr6.1.8
Perform a rehearsed drama/theatre work for an audience.

Theatre/Responding
#TH:Re7.1
Process Component: Reflect
Anchor Standard: Perceive and analyze artistic work.
Enduring Understanding: Theatre artists reflect to understand the impact of drama processes and theatre experiences.
Essential Question: How do theatre artists comprehend the essence of drama processes and theatre experiences?

Grade 6
TH:Re7.1.6
Describe and record personal reactions to artistic choices in a drama/theatre work.

Grade 7
TH:Re7.1.7
Compare recorded personal and peer reactions to artistic choices in a drama/ theatre work.

Grade 8
TH:Re7.1.8
Apply criteria to the evaluation of artistic choices in a drama/theatre work.

Theatre/Responding
#TH:Re8.1
Process Component: Interpret
Anchor Standard: Interpret intent and meaning in artistic work.
Enduring Understanding: Theatre artists' interpretations of drama/theatre work are influenced by personal experiences and aesthetics.
Essential Question: How can the same work of art communicate different messages to different people?

Grade 6
TH:Re8.1.6
a. Explain how artists make choices based on personal experience in a drama/theatre work.
b. Identify cultural perspectives that may influence the evaluation of a drama/theatre work.
c. Identify personal aesthetics, preferences, and beliefs through participation in or observation of drama/ theatre work.

Grade 7
TH:Re8.1.7
a. Identify the artistic choices made based on personal experience in a drama/theatre work.
b. Describe how cultural perspectives can influence the evaluation of drama/theatre work.
c. Interpret how the use of personal aesthetics, preferences, and beliefs can be used to discuss drama/theatre work.

Grade 8
TH:Re8.1.8
a. Recognize and share artistic choices when participating in or observing a drama/theatre work.
b. Analyze how cultural perspectives influence the evaluation of a drama/theatre work.
c. Apply personal aesthetics, preferences, and beliefs to evaluate a drama/theatre work.

Theatre/Responding
#TH:Re9.1
Process Component: Evaluate
Anchor Standard: Apply criteria to evaluate artistic work.
Enduring Understanding: Theatre artists apply criteria to investigate, explore, and assess drama and theatre work.
Essential Question: How are the theatre artist's processes and the audience's perspectives impacted by analysis and synthesis?

Grade 6
TH:Re9.1.6
a. Use supporting evidence and criteria to evaluate.
b. Apply the production elements used in a drama/theatre work to assess aesthetic choices.
c. Identify a specific audience or purpose for a drama/theatre work.

Grade 7
TH:Re9.1.7

a. Explain preferences, using supporting evidence and criteria to evaluate drama/theatre work.
b. Consider the aesthetics of the production elements in a drama/theatre work.
c. Identify how the intended purpose of a drama/theatre work appeals to a specific audience.

Grade 8
TH:Re9.1.8
a. Respond to a drama/ theatre work using supporting evidence, personal aesthetics, and artistic criteria.
b. Apply the production elements used in a drama/theatre work to assess aesthetic choices.
c. Assess the impact of a drama/theatre work on a specific audience.

Theatre/Connecting
#TH:Cn10.1
Process Component: Empathize
Anchor Standard: Synthesize and relate knowledge and personal experiences to make art.
Enduring Understanding: Theatre artists allow awareness of interrelationships between self and others to influence and inform their work.
Essential Question: What happens when theatre artists foster understanding between self and others through critical awareness, social responsibility, and the exploration of empathy?

Grade 6
TH:Cn10.1.6
Explain how the actions and motivations of characters in a drama/theatre work impact perspectives of a community or culture.

Grade 7
TH:Cn10.1.7
Incorporate multiple perspectives and diverse community ideas in a drama/theatre work.

Grade 8
TH:Cn10.1.8
Examine a community issue through multiple perspectives in a drama/theatre work.

Theatre/Connecting
#TH:Cn11.1
Process Component: Interrelate
Anchor Standard: Relate artistic ideas and works with societal, cultural, and historical context to deepen understanding.
Enduring Understanding: Theatre artists understand and can communicate their creative process as they analyze the way the world may be understood.
Essential Question: What happens when theatre artists allow an understanding of themselves and the world to inform perceptions about theatre and the purpose of their work?

Grade 6
TH:Cn11.1.6

Identify universal themes or common social issues and express them through a drama/theatre work.

Grade 7
TH:Cn11.1.7
Incorporate music, dance, art, and/or media to strengthen the meaning and conflict in a drama/theatre work with a particular cultural, global, or historic context.

Grade 8
TH:Cn11.1.8
Use different forms of drama/theatre work to examine contemporary social, cultural, or global issues.

Theatre/Connecting
#TH:Cn11.2
Process Component: Research
Anchor Standard: Relate artistic ideas and works with societal, cultural, and historical context to deepen understanding.
Enduring Understanding: Theatre artists critically inquire into the ways others have thought about and created drama processes and productions to inform their own work.
Essential Question: In what ways can research into theatre histories, theories, literature, and performances alter the way a drama process or production is understood?

Grade 6
TH:Cn11.2.6
a. Research and analyze two different versions of the same drama/theatre story to determine differences and similarities in the visual and aural world of each story.
b. Investigate the time period and place of a drama/theatre work to better understand performance and design choices.

Grade 7
TH:Cn11.2.7
a. Research and discuss how a playwright might have intended a drama/theatre work to be produced.
b. Examine artifacts from a time period and geographic location to better understand performance and design choices in a drama/theatre work.

Grade 8
TH:Cn11.2.8
a. Research the story elements of a staged drama/theatre work and compare them to another production of the same work.
b. Identify and use artifacts from a time period and place to develop performance and design choices in a drama/theatre work.

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High School Theatre

Theatre/Creating
#TH:Cr1.1
Process Component: Envision, Conceptualize
Anchor Standard: Generate and conceptualize artistic ideas and work.
Enduring Understanding: Theatre artists rely on intuition, curiosity, and critical inquiry.
Essential Question: What happens when theatre artists use their imaginations and/or learned theatre skills while engaging in creative exploration and inquiry?

HS Proficient
TH:Cr1.1.HSI
a. Apply basic research to construct ideas about the visual composition of a drama/theatre work.
b. Explore the impact of technology on design choices in a drama/theatre work.
c. Use script analysis to generate ideas about a character that is believable and authentic in a drama/theatre work.

HS Accomplished
TH:Cr1.1.HSII
a. Investigate historical and cultural conventions and their impact on the visual composition of a drama/theatre work.
b. Understand and apply technology to design solutions for a drama/theatre work.
c. Use personal experiences and knowledge to develop a character that is believable and authentic in a drama/theatre work.

HS Advanced
TH:Cr1.1.HSIII
a. Synthesize knowledge from a variety of dramatic forms, theatrical conventions, and technologies to create the visual composition of a drama/ theatre work.
b. Create a complete design for a drama/theatre work that incorporates all elements of technology.
c. Integrate cultural and historical contexts with personal experiences to create a character that is believable and authentic, in a drama/theatre work.

Theatre/Creating
#TH:Cr2.1
Process Component: Develop
Anchor Standard: Organize and develop artistic ideas and work.
Enduring Understanding: Theatre artists work to discover different ways of communicating meaning.
Essential Question: How, when, and why do theatre artists' choices change?

HS Proficient
TH:Cr2.1.HSI
a. Explore the function of history and culture in the development of a dramatic concept through a critical analysis of original ideas in a drama/theatre work.

b. Investigate the collaborative nature of the actor, director, playwright, and designers and explore their interdependent roles in a drama/theatre work.

HS Accomplished
TH:Cr2.1.HSII
a. Refine a dramatic concept to demonstrate a critical understanding of historical and cultural influences of original ideas applied to a drama/theatre work.
b. Cooperate as a creative team to make interpretive choices for a drama/theatre work.

HS Advanced
TH:Cr2.1.HSIII
a. Develop and synthesize original ideas in a drama/theatre work utilizing critical analysis, historical and cultural context, research, and western or non-western theatre traditions.
b. Collaborate as a creative team to discover artistic solutions and make interpretive choices in a devised or scripted drama/theatre work.

Theatre/Creating
#TH:Cr3.1
Process Component: Rehearse
Anchor Standard: Refine new work through play, drama processes and theatre experiences using critical analysis and experimentation.
Enduring Understanding: Theatre artists refine their work and practice their craft through rehearsal.
Essential Question: How do theatre artists transform and edit their initial ideas?

HS Proficient
TH:Cr3.1.HSI
a. Practice and revise a devised or scripted drama/theatre work using theatrical staging conventions.
b. Explore physical, vocal and physiological choices to develop a performance that is believable, authentic, and relevant to a drama/theatre work.
c. Refine technical design choices to support the story and emotional impact of a devised or scripted drama/ theatre work.

HS Accomplished
TH:Cr3.1.HSII
a. Use the rehearsal process to analyze the dramatic concept and technical design elements of a devised or scripted drama/theatre work.
b. Use research and script analysis to revise physical, vocal, and physiological choices impacting the believability and relevance of a drama/ theatre work.
c. Re-imagine and revise technical design choices during the course of a rehearsal process to enhance the story and emotional impact of a devised or scripted drama/theatre work.

HS Advanced
TH:Cr3.1.HSIII
a. Refine, transform, and re-imagine a devised or scripted drama/theatre work using the rehearsal process to invent or re-imagine style, genre, form, and conventions.
b. Synthesize ideas from research, script analysis, and context to create a performance that is

believable, authentic, and relevant in a drama/theatre work.
c. Apply a high level of technical proficiencies to the rehearsal process to support the story and emotional impact of a devised or scripted drama/theatre work.

Theatre/Performing
#TH:Pr4.1
Process Component: Select
Anchor Standard: Select, analyze, and interpret artistic work for presentation.
Enduring Understanding: Theatre artists make strong choices to effectively convey meaning.
Essential Question: Why are strong choices essential to interpreting a drama or theatre piece?

HS Proficient
TH:Pr4.1.HSI
a. Examine how character relationships assist in telling the story of a drama/theatre work.
b. Shape character choices using given circumstances in a drama/theatre work.

HS Accomplished
TH:Pr4.1.HSII
a. Discover how unique choices shape believable and sustainable drama/ theatre work.
b. Identify essential text information, research from various sources, and the director's concept that influence character choices in a drama/theatre work.

HS Advanced
TH:Pr4.1.HSIII
a. Apply reliable research of directors' styles to form unique choices for a directorial concept in a drama/theatre work.
b. Apply a variety of researched acting techniques as an approach to character choices in a drama/theatre work.

Theatre/Performing
#TH:Pr5.1
Process Component: Prepare
Anchor Standard: Develop and refine artistic techniques and work for presentation.
Enduring Understanding: Theatre artists develop personal processes and skills for a performance or design.
Essential Question: What can I do to fully prepare a performance or technical design?

HS Proficient
TH:Pr5.1.HSI
a. Practice various acting techniques to expand skills in a rehearsal or drama/theatre performance.
b. Use researched technical elements to increase the impact of design for a drama/theatre production.

HS Accomplished
TH:Pr5.1.HSII

a. Refine a range of acting skills to build a believable and sustainable drama/theatre performance.
b. Apply technical elements and research to create a design that communicates the concept of a drama/theatre production.

HS Advanced
TH:Pr5.1.HSIII
a. Use and justify a collection of acting exercises from reliable resources to prepare a believable and sustainable performance.
b. Explain and justify the selection of technical elements used to build a design that communicates the concept of a drama/theatre production.

Theatre/Performing
#TH:Pr6.1
Process Component: Share, Present
Anchor Standard: Convey meaning through the presentation of artistic work.
Enduring Understanding: Theatre artists share and present stories, ideas, and envisioned worlds to explore the human experience.
Essential Question: What happens when theatre artists and audiences share a creative experience?

HS Proficient
TH:Pr6.1.HSI
Perform a scripted drama/theatre work for a specific audience.

HS Accomplished
TH:Pr6.1.HSII
Present a drama/theatre work using creative processes that shape the production for a specific audience.

HS Advanced
TH:Pr6.1.HSIII
Present a drama/theatre production for a specific audience that employs research and analysis grounded in the creative perspectives of the playwright, director, designer, and dramaturgy.

Theatre/Responding
#TH:Re7.1
Process Component: Reflect
Anchor Standard: Perceive and analyze artistic work.
Enduring Understanding: Theatre artists reflect to understand the impact of drama processes and theatre experiences.
Essential Question: How do theatre artists comprehend the essence of drama processes and theatre experiences?

HS Proficient
TH:Re7.1.HSI

Respond to what is seen, felt, and heard in a drama/theatre work to develop criteria for artistic choices.

HS Accomplished
TH:Re7.1.HSII
Demonstrate an understanding of multiple interpretations of artistic criteria and how each might be used to influence future artistic choices of a drama/theatre work.

HS Advanced
TH:Re7.1.HSIII
Use historical and cultural context to structure and justify personal responses to a drama/theatre work.

Theatre/Responding
#TH:Re8.1
Process Component: Interpret
Anchor Standard: Interpret intent and meaning in artistic work.
Enduring Understanding: Theatre artists' interpretations of drama/theatre work are influenced by personal experiences and aesthetics.
Essential Question: How can the same work of art communicate different messages to different people?

HS Proficient
TH:Re8.1.HSI
a. Analyze and compare artistic choices developed from personal experiences in multiple drama/theatre works.
b. Identify and compare cultural perspectives and contexts that may influence the evaluation of a drama/theatre work.
c. Justify personal aesthetics, preferences, and beliefs through participation in and observation of a drama/theatre work.

HS Accomplished
TH:Re8.1.HSII
a. Develop detailed supporting evidence and criteria to reinforce artistic choices, when participating in or observing a drama/theatre work.
b. Apply concepts from a drama/theatre work for personal realization about cultural perspectives and understanding.
c. Debate and distinguish multiple aesthetics, preferences, and beliefs through participation in and observation of drama/theatre work.

HS Advanced
TH:Re8.1.HSIII
a. Use detailed supporting evidence and appropriate criteria to revise personal work and interpret the work of others when participating in or observing a drama/ theatre work.
b. Use new understandings of cultures and contexts to shape personal responses to drama/theatre work.
c. Support and explain aesthetics, preferences, and beliefs to create a context for critical research that informs artistic decisions in a drama/theatre work.

Theatre/Responding
#TH:Re9.1
Process Component: Evaluate
Anchor Standard: Apply criteria to evaluate artistic work.
Enduring Understanding: Theatre artists apply criteria to investigate, explore, and assess drama and theatre work.
Essential Question: How are the theatre artist's processes and the audience's perspectives impacted by analysis and synthesis?

HS Proficient
TH:Re9.1.HSI
a. Examine a drama/ theatre work using supporting evidence and criteria, while considering art forms, history, culture, and other disciplines.
b. Consider the aesthetics of the production elements in a drama/theatre work.
c. Formulate a deeper understanding and appreciation of a drama/ theatre work by considering its specific purpose or intended audience.

HS Accomplished
TH:Re9.1.HSII
a. Analyze and assess a drama/theatre work by connecting it to art forms, history, culture, and other disciplines using supporting evidence and criteria.
b. Construct meaning in a drama/theatre work, considering personal aesthetics and knowledge of production elements while respecting others' interpretations.
c. Verify how a drama/theatre work communicates for a specific purpose and audience.

HS Advanced
TH:Re9.1.HSIII
a. Research and synthesize cultural and historical information related to a drama/theatre work to support or evaluate artistic choices.
b. Analyze and evaluate varied aesthetic interpretations of production elements for the same drama/theatre work.
c. Compare and debate the connection between a drama/theatre work and contemporary issues that may impact audiences.

Theatre/Connecting
#TH:Cn10.1
Process Component: Empathize
Anchor Standard: Synthesize and relate knowledge and personal experiences to make art.
Enduring Understanding: Theatre artists allow awareness of interrelationships between self and others to influence and inform their work.
Essential Question: What happens when theatre artists foster understanding between self and others through critical awareness, social responsibility, and the exploration of empathy?

HS Proficient
TH:Cn10.1.HSI

Investigate how cultural perspectives, community ideas and personal beliefs impact a drama/theatre work.

HS Accomplished
TH:Cn10.1.HSII
Choose and interpret a drama/theatre work to reflect or question personal beliefs.

HS Advanced
TH:Cn10.1.HSIII
Collaborate on a drama/theatre work that examines a critical global issue using multiple personal, community, and cultural perspectives.

Theatre/Connecting
#TH:Cn11.1
Process Component: Interrelate
Anchor Standard: Relate artistic ideas and works with societal, cultural, and historical context to deepen understanding.
Enduring Understanding: Theatre artists understand and can communicate their creative process as they analyze the way the world may be understood.
Essential Question: What happens when theatre artists allow an understanding of themselves and the world to inform perceptions about theatre and the purpose of their work?

HS Proficient
TH:Cn11.1.HSI
Explore how cultural, global, and historic belief systems affect creative choices in a drama/theatre work.

HS Accomplished
TH:Cn11.1.HSII
Integrate conventions and knowledge from different art forms and other disciplines to develop a cross-cultural drama/theatre work.

HS Advanced
TH:Cn11.1.HSIII
Develop a drama/theatre work that identifies and questions cultural, global, and historic belief systems.

Theatre/Connecting
#TH:Cn11.2
Process Component: Research
Anchor Standard: Relate artistic ideas and works with societal, cultural, and historical context to deepen understanding.
Enduring Understanding: Theatre artists critically inquire into the ways others have thought about and created drama processes and productions to inform their own work.
Essential Question: In what ways can research into theatre histories, theories, literature, and performances alter the way a drama process or production is understood?

HS Proficient
TH:Cn11.2.HSI
a. Research how other theatre artists apply creative processes to tell stories in a devised or scripted drama/theatre work, using theatre research methods.
b. Use basic theatre research methods to better understand the social and cultural background of a drama/theatre work.

HS Accomplished
TH:Cn11.2.HSII
a. Formulate creative choices for a devised or scripted drama/theatre work based on theatre research about the selected topic.
b. Explore how personal beliefs and biases can affect the interpretation of research data applied in drama/theatre work.

HS Advanced
TH:Cn11.2.HSIII
a. Justify the creative choices made in a devised or scripted drama/theatre work, based on a critical interpretation of specific data from theatre research.
b. Present and support an opinion about the social, cultural, and historical understandings of a drama/theatre work, based on critical research.

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GLOSSARY: THEATRE

Acting techniques
Specific skills, pedagogies, theories, or methods of investigation used by an actor to prepare for a theatre performance

Believability
Theatrical choices thought to be "true" based upon an understanding of any given fictional moment, interpretation of text, and/or human interaction

Character traits
Observable embodied actions that illustrate a character's personality, values, beliefs, and history

Conflict
The problem, confrontation, or struggle in a scene or play; conflict may include a character against him or herself, a character in opposition to another character, a character against nature, a character against society, or a character against the supernatural

Creative drama
A process-centered, non-exhibitional approach to drama intended to benefit the performers themselves; story drama and process drama are two types of creative drama

Creative processes
The application of production and technical elements (see the definitions) to a theatrical production

Devised drama
Creation of an original performance piece by an ensemble

Dialogue
A conversation between two or more characters

Dramatic play
Make-believe where children naturally assign and accept roles, then act them out

Focus
Commitment by a participant (an actor, technician, director) to remain in the scope of the project or to stay within the world of the play

Genre
Relating to a specific kind or type of drama and theatre such as a tragedy, drama, melodrama, comedy, or farce

Gesture
An expressive and planned movement of the body or limbs
Given circumstances
The underlying actions and events that have happened before the play, story, or devised piece begins
Guided drama experience

A leader guides participants during a process drama, story drama, or creative drama experience (see the definitions) through side-coaching, narration, and prompting; the action of the drama does not stop in order for the leader to support the students; facilitator may guide participants in or out of role

Improvise
The spontaneous, intuitive, and immediate response of movement and speech; a distinction can be made between spontaneous improvisation, which is immediate and unrehearsed, and prepared improvisation, which is shaped and rehearsed

Imaginary elsewhere
An imagined location which can be historical, fictional, or realistic

Imagined worlds
An imaginary world created collectively by participants in a drama experience

Inner thoughts
The underlying and implied meaning or intentions in the character's dialogue or actions (also known as subtext)

Motivation
Reasons why a character behaves or reacts in a particular way in a scene or play

Non-representational materials
Objects which can be transformed into specific props through the imagination

Objective
A goal or particular need or want that a character has within a scene or play

Plot
A narrative as revealed through the action and/or dialogue; traditionally, a plot has the elements of exposition, inciting incident, conflict, rising action, climax, and resolution or falling action

Process drama
A non-linear, episodic, process-centered, improvised form of drama in which teacher and students are in-role exploring and reflecting on an issue, story, theme, problem, or idea in a non-exhibitional format that is intended to benefit the performers themselves

Production elements
Technical elements selected for use in a specific production, including sets, sound, costumes, lights, music, props, and make-up, as well as elements specific to the production such as puppets, masks, special effects, or other story telling devices/concepts

Scripted drama
A piece of writing for the theatre that includes a description of the setting, a list of the characters, the dialogue, and the action of the characters

Script analysis

The study of a script to understand the underlying structure and themes of the play's story, and the motives and objectives of its characters

Staging
Patterns of movement in a scene or play including, for example, stage crosses, entrances, and exits which help to convey meaning

Story drama
Episodic, process-centered, improvised form of drama that uses existing literature as a starting point for drama exploration, the drama explores moments (before, after, or within) that may not exist in the story and is presented in a non-exhibitional format that is intended to benefit the performers themselves

Story elements
Characters, setting, dialogue, and plot that create a story

Style
The use of a specific set of characteristic or distinctive techniques such as realism, expressionism, epic theatre, documentary theatre, or classical drama; style may also refer to the unique artistic choices of a particular playwright, director, or actor

Tactic
The means by which a character seeks to achieve their objective, the selection of tactics are based on the obstacle presented; in acting and directing a tactic refers to a specific action verb

Technical elements
The elements of spectacle such as sets, sound, costume, lights, music, props, and makeup used to create a unified and meaningful design for a theatrical production

Theatrical conventions
Practices and/or devices that the audience and actors accept in the world of the play even when it is not realistic, such as a narrator, flashback, or an aside

Theme
The aspect of the human condition under investigation in the drama; it can be drawn from unifying topics or questions across content areas

Visual composition
The arrangement of actors and scenery on a stage for a theatrical production, sometimes known as mise-en scène

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~~IDAHO CONTENT STANDARDS~~
~~GRADE 9-12~~
~~HUMANITIES: INTERDISCIPLINARY~~

~~Standard 1: Historical and Cultural Contexts~~

~~Students demonstrate an understanding of how people and cultures are connected across time. Humanities instruction prepares students to work and live as global citizens because of their greater understanding of their own culture and the cultures of others.~~

~~Interdisciplinary Humanities students explain and discuss the historical and cultural contexts of the disciplines they are studying. Students illustrate the relationships between those contexts by creating original works. Students analyze society through the arts and humanities disciplines.~~

~~Goal 1.1: Understand the historical and cultural contexts of the arts and humanities disciplines.~~

~~Objective(s): By the end of high school, the student will be able to:~~

- ~~9-12.I.1.1.1 Identify, in context, events and people influential in the development of historical events and/or movements and living cultures.~~
- ~~9-12.I.1.1.2 Demonstrate the ways in which the arts and humanities reflect events.~~
- ~~9-12.I.1.1.3 Illustrate how an artifact symbolizes and reflects a particular culture and/or time period.~~

~~Goal 1.2: Understand the interrelationships within the arts and humanities disciplines.~~

~~Objective(s): By the end of high school, the student will be able to:~~

- ~~9-12.I.1.2.1 Acquire a working vocabulary of two or more arts and humanities disciplines.~~
- ~~9-12.I.1.2.2 Compare and contrast the products and processes of two arts and humanities disciplines.~~
- ~~9-12.I.1.2.3 Illustrate the relationship between two or more arts and humanities disciplines and the extent to which they enhance or influence each other.~~
- ~~9-12.I.1.2.4 Create an original work that shows the relationship between two or more arts and humanities disciplines.~~

~~Goal 1.3: Understand the interrelationships between cultures. Objective(s): By~~

~~the end of high school, the student will be able to:~~

- ~~9-12.I.1.3.1 Identify the ways the structure of an art or discipline mirrors the structure and values of society.~~
- ~~9-12.I.1.3.2 Identify the ways that the humanities disciplines portray human relationships.~~

~~Standard 2: Critical Thinking~~

~~Students understand the purposes and functions of the arts and humanities. They build literacy and develop critical thinking through analysis and interpretation.~~

~~Interdisciplinary Humanities students research and analyze important cultural, artistic, and societal issues as they relate to two or more arts and humanities disciplines (e.g., visual art, music, theatre, dance, world language, history, literature). Students discuss abstract ideas and artworks and make judgments about them. Students formulate and present personal conclusions about the importance of the humanities disciplines within a culture.~~

~~Goal 2.1: Conduct analyses in the arts and humanities disciplines. Objective(s): By~~

~~the end of high school, the student will be able to:~~

~~9-12.I.2.1.1 Relate arts and humanities disciplines to ethical and/or human issues.~~
~~9-12.I.2.1.2 Compare and contrast works or ideas from at least two cultures, historical periods, or geographical areas.~~
~~9-12.I.2.1.3 Research and present findings about the role of artworks in a society.~~

~~Goal 2.2: Engage in discussions about arts and humanities issues. Objective(s): By~~

~~the end of high school, the student will be able to:~~

~~9-12.I.2.2.1 Analyze an artifact or idea and debate its meaning in the context of its societal values.~~
~~9-12.I.2.2.2 Describe the influence of religion on government, culture, artistic creation, technological development, and/or social conduct.~~
~~9-12.I.2.2.3 Discuss ways in which the arts and humanities both break through and create class barriers.~~
~~9-12.I.2.2.4 Discuss the significance of artworks in a society.~~

~~Goal 2.3: Demonstrate informed judgment about philosophical, aesthetic, or ethical arts and humanities issues.~~

~~Objective(s): By the end of high school, the student will be able to:~~

~~9-12.I.2.3.1 Establish a set of aesthetic criteria and apply it in evaluating one's own work and works of others.~~
~~9-12.I.2.3.2 Create an original work that offers a response to a human problem.~~

~~Standard 3: Performance~~

~~Students engage in the creation of original works and/or the interpretation of works of others, culminating in a performance or presentation. Humanities students demonstrate knowledge of themes and meanings in more than one humanities discipline. Students select, analyze, and replicate or imitate significant works in the arts and humanities disciplines. Students create original work that demonstrates knowledge of a(n) historical period, culture, or universal theme.~~

~~Goal 3.1: Understand concepts essential to interdisciplinary study. Objective(s): By~~

~~the end of high school, the student will be able to:~~

~~9-12.I.3.1.1 Discuss the role of diverse cultures within the arts and humanities. 9-~~
~~12.I.3.1.2 Identify universal themes in the arts and humanities disciplines.~~
~~9-12.I.3.1.3 Select and exhibit works that communicate a common meaning.~~

~~Goal 3.2: Communicate in the humanities disciplines through application of knowledge and skills.~~

~~Objective(s): By the end of high school, the student will be able to:~~

~~9-12.I.3.2.1 Illustrate or document the potential of the arts and humanities to enhance and expand one's worldview.~~
~~9-12.I.3.2.2 Interpret how a literary/artistic work relates to the history and/or culture from which it originated.~~
~~9-12.I.3.2.3 Replicate or imitate a literary/artistic masterpiece, composition, genre, or style through its distinguishing characteristics.~~

~~Goal 3.3: Communicate in the humanities disciplines through creative expression.~~

~~Objective(s): By the end of high school, the student will be able to:~~

~~9-12.I.3.3.1 Express, through means other than expository writing, an understanding and appreciation of the arts and humanities.~~
~~9-12.I.3.3.2 Illustrate a connection between two humanities disciplines, showing how they compliment one another.~~
~~9-12.I.3.3.3 Create an artistic work that expresses the uniqueness of a historical period or cultural influence.~~
~~9-12.I.3.3.4 Create a literary work that targets a universal theme.~~

IDAHO
STATE DEPARTMENT OF EDUCATION

ARTS AND HUMANITIES
INTERDISCIPLINARY HUMANITIES

Approved by the Idaho State Board of Education, August 11, 2016

Interdisciplinary Humanities

Interdisciplinary Humanities Course

Definition:

The Interdisciplinary Humanities course is a pathway for learners to discover and understand the human experience through a balanced and integrated combination of the arts and/or humanities with inclusion of **two or more** of the following content areas: architecture, philosophy, literature, world religions, visual and media arts, music, dance, theater, history and world languages.

Purpose:

In order to prepare students both to appreciate and apply the role of the arts and humanities in critical thinking and creative problem solving, an interdisciplinary humanities course will explore the human experience through the analysis and interpretation of themes, issues, and/or movements. The Interdisciplinary Humanities course will encourage students to become lifelong explorers who discover their connectedness to the records of lived experiences outside of their own individual social and cultural context. Through the creation/interpretation/communication of an original work and through the performance/presentation/production of that work, students are able to gain new perspectives.

Design:

The Interdisciplinary Humanities course should provide a well-rounded, thematic hands-on experience. The course is intended to integrate content from **two or more** arts and humanities disciplines. This course must be built upon the following five anchor standards: connect and compare, respond, create, present, and reflect. The standards for the Interdisciplinary Humanities course do not provide discipline content; the content should be derived from the selected disciplines.

Pedagogy:

In the Interdisciplinary Humanities classroom, the teacher(s) will have extensive expertise in two or more disciplines and will enable students to identify and apply authentic connections. Instruction will integrate essential concepts that transcend individual disciplines. The integration must be balanced in content, practices, and assessments. Structured around themes, issues, and/or movements, instruction will maintain a balance of academic study, performance, and project-based learning. The instructor will foster a collaborative environment that encourages academic risk-taking and inquiry.

Anchor Standard 1: Connect and compare ideas, diverse cultures, and events through two or more disciplines.
Enduring Understanding: Sources of inspiration are transformed into works that express the human experience.

Essential Question(s):
- ✓ What inspires people or cultures to create?
- ✓ What connections and comparisons between ideas, cultures, and events can be made?
- ✓ What is the relationship of a work to its time/culture?

Goals and Objectives:
- Goal CC1: Understand the interdisciplinary relationships of ideas, cultures, and events.
  - Objective CC1.1: Develop a working vocabulary for the disciplines of study.
  - Objective CC1.2: Identify and articulate how a work expresses the human experience.

- Goal CC2: Identify the relationship between two or more works/disciplines and how the historical contexts of ideas, cultures, and events are represented.
  - Objective CC2.1: Identify, in context, events and people influential in the development of historical events, movements, themes, and cultures.
  - Objective CC2.2: Explain how an artifact or work symbolizes and reflects a particular culture, event, theme, movement, or time period.

- Goal CC3: Understand how the human experience is represented through the arts and humanities.
  - Objective CC3.1: Identify the ways in which the structure of an art or discipline mirrors or portrays the values of society.
  - Objective CC3.2: Evaluate original works and how they represent a historical event, theme, movement, and/or culture.

Anchor Standard 2: Respond to universal themes, issues, and/or movements that express the human experience.
Enduring Understanding: Human experience repeats itself.

Essential Questions(s):
- ✓ How do themes, issues, and/or movements shape the human experience?
- ✓ How do we learn from the human experience?

Goals and Objectives:
- Goal RES1: Conduct analyses in the arts and humanities disciplines.
  - Objective RES 1.1: Summarize how the human experience is expressed through the arts and humanities.
  - Objective RES 1.2: Interpret content knowledge from multiple perspectives and/or sources.
  - Objective RES 1.3: Discover how key themes, issues, and/or movements are conveyed through the arts and humanities.

Anchor Standard 3: Create original works or unique interpretations that demonstrate knowledge of themes,

issues, and/or movements that express the human experience.
Enduring Understanding: Through the creative process, people make meaning by investigating and developing awareness of perceptions, knowledge, and experiences.

Essential Question(s):
- ✓ How does creating enrich people's lives?
- ✓ How do people contribute to awareness and understanding of their lives and the lives of their communities through the creative process?
- ✓ What role does persistence play in the creative process?

Goals and Objectives:
- Goal CR1: Communicate in the arts and humanities disciplines through creative expression
  - Objective CR1.1: Express, through means other than expository writing, an understanding and appreciation of the arts and humanities.
  - Objective CR1.2: Engage in collaborative learning to foster the creative process.
  - Objective CR1.3: Create an original product that interprets and/or investigates themes, issues, and/or movements.
  - Objective CR1.4: Revise, refine and develop an original work.

Anchor Standard 4: Convey meaning through the presentation/performance/production of an original work or unique interpretation of a work.
Enduring Understanding: Connections between multiple disciplines are visible through the presentation/performance of original works.

Essential Question(s):
- ✓ How does sharing original work deepen interdisciplinary understanding of ourselves and the human experience?
- ✓ How do we select the best method of performance/presentation/production to convey meaning?

Goals and Objectives:
- Goal PR1: Perform/present/produce an original work or interpretation of a work for an audience.
  - Objective PR1.1: Combine knowledge and understanding from two or more disciplines to present/perform their original or interpreted works for an audience.
  - Objective PR 1.2: Convey meaning through their presentation/performance.

- Goal PR2: Justify choices made in creating or interpreting a work.
  - Objective PR2.1: Apply knowledge and understanding from two or more disciplines to justify choices in the creation/interpretation of works.
  - Objective PR 2.2: Engage in constructive critique with peers.

Anchor Standard 5: Reflect on the process of creating/interpreting/presenting a work.
Enduring Understanding: Reflection on the creative process deepens understanding of the content and the creator.

Essential Question(s):

- ✓ How is the quality of a performance/presentation/production determined?
- ✓ When does the creator know that a work is finished?
- ✓ How do the arts and humanities enhance and empower our lives?

Goals and Objectives:

- Goal REF1: Evaluate one's own work and the works of others as reflections of the themes, issues, and/or movements addressed in the course.
    - Objective REF 1.1: Utilize and apply a set of aesthetic criteria in evaluating the quality of one's own work and works of others.
    - Objective REF 1.2: Respond to critique and criteria to revise or justify one's own work.

- Goal REF2: Reflect upon the potential of the arts and humanities to enhance and expand one's worldview.

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~~IDAHO CONTENT STANDARDS~~
~~GRADE K-3 HUMANITIES:~~
~~MUSIC~~

~~Standard 1: Historical and Cultural Contexts~~

~~Students demonstrate an understanding of how people and cultures are connected across time. Humanities instruction prepares students to work and live as global citizens because of their greater understanding of their own culture and the cultures of others.~~

~~Students in grades K-3 discuss the history, culture, and traditions found in selected musical examples. Students identify ideas and emotions expressed through music and examine how they relate to other disciplines within that culture.~~

~~Goal 1.1: Discuss the historical and cultural contexts of music. Objective(s): By~~

~~the end of Grade 3, the student will be able to:~~
~~K-3.Mu.1.1.1 Name the historical or cultural background of musical selections learned. K-~~
~~3.Mu.1.1.2 Identify the country or region of musical selections learned.~~
~~K-3.Mu.1.1.3 Recognize characteristics of suitable music for various occasions and traditions.~~

~~Goal 1.2: Discuss the interrelationships among visual and performing arts disciplines of music and culture.~~

~~Objective(s): By the end of Grade 3, the student will be able to:~~
~~K-3.Mu.1.2.1 Identify ideas and emotions that are expressed through music and other disciplines.~~

~~Standard 2: Critical Thinking~~

~~Students understand the purposes and functions of the arts. They build literacy and develop critical thinking through analysis and interpretation.~~

~~Students in grades K-3 differentiate among simple musical forms and identify instrument families and voices. Students discuss preferences for musical examples. Students explain the role of music in their lives.~~

~~Goal 2.1: Conduct analyses in music.~~

~~Objective(s): By the end of Grade 3, the student will be able to:~~
~~K-3.Mu.2.1.1 Examine music as a way to communicate emotions.~~
~~K-3.Mu.2.1.2 Use music vocabulary to discuss specific works of music. K-~~
~~3.Mu.2.1.3 Identify sounds of different instrument families and voices.~~
~~K-3.Mu.2.1.4 Differentiate between simple musical forms when they are heard.~~

~~Goal 2.2: Formulate and express opinions about musical performances.~~

~~**Objective(s): By the end of Grade 3, the student will be able to:**~~

~~K-3.Mu.2.2.1 Discuss the importance of music in one's own life.~~
~~K-3.Mu.2.2.2 Discuss preferences for musical examples using familiar musical terms.~~ ~~K-3.Mu.2.2.3 Draw conclusions about the meaning of the term "classical music."~~

~~**Standard 3: Performance**~~

~~Students engage in the creation of original works and/or the interpretation of works of others, culminating in a performance or presentation.~~

~~Students in grades K-3 read and perform simple music notation. Students perform alone and in groups on pitch and in rhythm responding to the conductor. Students create melodic or rhythmic responses using instructor guidelines. Students move to the beat of music.~~

~~**Goal 3.1: Utilize concepts essential to music.**~~

~~**Objective(s): By the end of Grade 3, the student will be able to:**~~

~~K-3.Mu.3.1.1 Sing independently with a clear tone and on pitch.~~ ~~K-3.Mu.3.1.2 Identify symbols and notation in music.~~
~~K-3.Mu.3.1.3 Read music notation in simple meters or groupings using a system of symbols, numbers, or letters.~~

~~**Goal 3.2: Communicate through music, applying artistic concepts, knowledge, and skills.**~~

~~**Objective(s): By the end of Grade 3, the student will be able to:**~~

~~K-3.Mu.3.2.1 Identify and perform simple songs from different cultures and genres.~~
~~K-3.Mu.3.2.2 Illustrate group singing and instrumental skills in response to conductor cues.~~
~~K-3.Mu.3.2.3 Echo rhythmic or melodic patterns accurately.~~
~~K-3.Mu.3.2.4 Demonstrate proper behavior for different types of music performances.~~

~~**Goal 3.3: Communicate through music with creative expression. Objective(s): By the end of Grade 3, the student will be able to:**~~

~~K-3.Mu.3.3.1 Improvise musical "answers" to given rhythmic and/or melodic phrases.~~ ~~K-3.Mu.3.3.2 Sing/play a simple melody following a director.~~
~~K-3.Mu.3.3.3 Move to the beat of music in a prescribed manner.~~

~~IDAHO CONTENT STANDARDS~~
~~GRADE 4-5 HUMANITIES:~~
~~MUSIC~~

~~Students are expected to know content and apply skills from previous grades. Standard 1:~~

~~Historical and Cultural Contexts~~

~~Students demonstrate an understanding of how people and cultures are connected across time. Humanities instruction prepares students to work and live as global citizens because of their greater understanding of their own culture and the cultures of others.~~

~~Students in grades 4-5 identify and describe the use of musical elements from various cultures and time periods. Students explain how music relates to other subject areas, using terms common to the arts.~~

~~Goal 1.1: Discuss the historical and cultural contexts of music. Objective(s): By~~

~~the end of Grade 5, the student will be able to:~~

~~4-5.Mu.1.1.1 Describe how musical elements are used in music of our own culture as well as other cultures.~~
~~4-5.Mu.1.1.2 Identify characteristics of music from two different historical periods. 4-5.Mu.1.1.3 Identify specific compositions as belonging to a particular era in music history.~~
~~4-5.Mu.1.1.4 Recognize the uses of music in everyday life.~~

~~Goal 1.2: Discuss the interrelationships among visual and performing arts disciplines.~~

~~Objective(s): By the end of Grade 5, the student will be able to:~~

~~4-5.Mu.1.2.1 Compare a musical selection with another art form that uses a similar style. 4-5.Mu.1.2.2 Identify similarities and differences in the meanings of terms common to other arts disciplines~~
~~4-5.Mu.1.2.3 Describe ways that music is related to another subject area.~~

~~Standard 2: Critical Thinking~~

~~Students understand the purposes and functions of the arts. They build literacy and develop critical thinking through analysis and interpretation.~~

~~Students in grades 4-5 identify specific elements of music and sounds of various instruments and voices. Students discuss the importance of music in today's society. Students express personal preferences for a specific work using appropriate arts vocabulary.~~

~~Goal 2.1: Conduct analyses in music.~~

~~Objective(s): By the end of Grade 5, the student will be able to:~~

~~4-5.Mu.2.1.1 Describe music as a form of communication.~~

~~4-5.Mu.2.1.2 Use music vocabulary to discuss specific compositions of various styles and cultures.~~
~~4-5.Mu.2.1.3 Recognize and identify specific elements of music (melody, harmony, rhythm, form, timbre).~~

~~**Goal 2.2: Formulate and express opinions about musical performances. Objective(s):**~~

~~**By the end of Grade 5, the student will be able to:**~~
~~4-5.Mu.2.2.1 Discuss the importance of music in our society.~~
~~4-5.Mu.2.2.2 Express personal preference for a specific work using appropriate musical vocabulary.~~
~~4-5.Mu.2.2.3 Identify and discuss copyright issues in music.~~

~~**Standard 3: Performance**~~

~~Students engage in the creation of original works and/or the interpretation of works of others, culminating in a performance or presentation.~~

~~Students in grades 4-5 use standard music symbols and terms to read, notate, and perform music. Students sing, alone and with others, accurately with appropriate dynamics, breath control, phrasing, and interpretation. Students also perform in groups blending vocal/instrumental sounds and follow a conductor. Students improvise simple melodic phrases.~~

~~**Goal 3.1: Utilize concepts essential to music.**~~

~~**Objective(s): By the end of Grade 5, the student will be able to:**~~
~~4-5.Mu.3.1.1 Sing/play independently or in a small ensemble with grade appropriate music, following the cues of a conductor.~~
~~4-5.Mu.3.1.2 Read, notate, and perform meter, rhythm, pitch, dynamics, and tempo using standard music symbols.~~
~~4-5.Mu.3.1.3 Use standard musical notation to sing/play grade appropriate material.~~

~~**Goal 3.2: Communicate through music, applying artistic concepts, knowledge, and skills.**~~

~~**Objective(s): By the end of Grade 5, the student will be able to:**~~
~~4-5.Mu.3.2.1 Sing in harmony using simple ostinatos, partner songs, descants, and canons.~~
~~4-5.Mu.3.2.2 Perform independently while other students sing or play contrasting parts.~~
~~4-5.Mu.3.2.3 Sing/play accurately with appropriate dynamics, breath control, phrasing, and interpretation.~~
~~4-5.Mu.3.2.4 Discuss and demonstrate the importance of proper concert behavior.~~
~~4-5.Mu.3.2.5 Demonstrate interpersonal skills through working collaboratively and productively with others.~~

~~Goal 3.3: Communicate through music with creative expression.~~

~~Objective(s): By the end of Grade 5, the student will be able to:~~

~~4-5.Mu.3.3.1 Create original rhythmic/melodic ostinatos to accompany group performances.~~

~~4-5.Mu.3.3.2 Sing/play an improvised simple melody in a call and response context.~~

~~4-5.Mu.3.3.3 Improvise movement that is stylistically appropriate to music (e.g., free style).~~

~~IDAHO CONTENT STANDARDS~~
~~GRADE 6-8~~
~~HUMANITIES: MUSIC~~

~~Students are expected to know content and apply skills from previous grades.~~ Standard

1~~: Historical and Cultural Contexts~~

~~Students demonstrate an understanding of how people and cultures are connected across time. Humanities instruction prepares students to work and live as global citizens because of their greater understanding of their own culture and the cultures of others.~~

~~Students in grades 6-8 classify the historical periods of music studied. Students analyze the cultural contexts of music studied. Students compare and contrast musical styles and genres with another art form or subject area.~~

~~Goal 1.1: Discuss the historical and cultural contexts of music.~~

~~Objective(s): By the end of Grade 8, the student will be able to:~~

~~6-8.Mu.1.1.1 Analyze the relationship of a country's traditions and its music.~~
~~6-8.Mu.1.1.2 Identify the historical period during which musical works being studied were composed.~~
~~6-8.Mu.1.1.3 Discuss the relationship of music to the historical period in which it was composed.~~
~~6-8.Mu.1.1.4 Identify prominent musicians in contemporary society.~~

~~Goal 1.2: Discuss the interrelationships among visual and performing arts disciplines.~~

~~Objective(s): By the end of Grade 8, the student will be able to:~~

~~6-8.Mu.1.2.1 Compare a musical style with another art form sharing a similar style or movement.~~
~~6-8.Mu.1.2.2 Discuss similarities among various disciplines of the arts. 6-~~
~~8.Mu.1.2.3 Discuss the connections of music to other subject areas.~~

Standard 2~~: Critical Thinking~~

~~Students understand the purposes and functions of the arts. They build literacy and develop critical thinking through analysis and interpretation.~~

~~Students in grades 6-8 describe and analyze aural examples of music, using correct musical terminology. Students identify a musical theme. Students develop criteria for high musical quality. Students evaluate musical performances.~~

~~Goal 2.1: Conduct analyses in music.~~

~~Objective(s): By the end of Grade 8, the student will be able to:~~

~~6-8.Mu.2.1.1 Identify a musical theme.~~

~~6-8.Mu.2.1.2 Describe and analyze aural examples of music using correct musical terms pertaining to form, meter, rhythm, basic keys.~~
~~6-8.Mu.2.1.3 Identify the sounds of voices and musical instruments as they are used in musical works.~~
~~6-8.Mu.2.1.4 Discuss the style of a musical selection.~~

~~Goal 2.2: Formulate and express opinions about musical performances. Objective(s): By the end of Grade 8, the student will be able to:~~

~~6-8.Mu.2.2.1 Discuss the roles of professional and amateur musicians in society. 6-8.Mu.2.2.2 Express personal preference for music using appropriate musical terminology.~~
~~6-8.Mu.2.2.3 Debate copyright issues in music.~~
~~6-8.Mu.2.2.4 Develop criteria for high musical quality.~~
~~6-8.Mu.2.2.5 Evaluate constructively the quality of one's performance and the performances of others.~~

~~Standard 3: Performance~~

~~Students engage in the creation of original works and/or the interpretation of works of others, culminating in a performance or presentation.~~

~~Students in grades 6-8 read, notate, and perform music of various styles and genres. Students sing/play accurately and expressively, following the directions of a conductor and using appropriate dynamics and phrasing. Students perform or compose music using a variety of sound sources. Students formulate a method of consistent musical practice.~~

~~Goal 3.1: Utilize concepts essential to music.~~

~~Objective(s): By the end of Grade 8, the student will be able to:~~

~~6-8.Mu.3.1.1 Sing/play independently or in a small ensemble with grade appropriate music, following the cues of a conductor.~~
~~6-8.Mu.3.1.2 Read and notate music symbols (time and key signatures, note values, standard notation symbols for pitch, duration, dynamics, articulation, expression).~~
~~6-8.Mu.3.1.3 Use standard musical notation to sing/play grade appropriate material. 6-8.Mu.3.1.4 Formulate a method of consistent musical practice.~~

~~Goal 3.2: Communicate through music, applying artistic concepts, knowledge, and skills.~~

~~Objective(s): By the end of Grade 8, the student will be able to:~~

~~6-8.Mu.3.2.1 Sing/play accurately and expressively in at least 3-part harmony using good breath control, diction, articulation, and posture both alone and in small groups, following the directions of a conductor.~~
~~6-8.Mu.3.2.2 Perform in an ensemble, using appropriate musical technique.~~
~~6-8.Mu.3.2.3 Sing/play expressively with appropriate dynamics and phrasing, considering the intent of the music's creator.~~

~~6-8.Mu.3.2.3. Discuss and demonstrate the importance of proper concert behavior and attire.~~
~~6-8/Mu.3.2.5. Demonstrate interpersonal skills through working collaboratively and productively with others.~~

~~Goal 3.3: Communicate through music with creative expression.~~

~~Objective(s): By the end of Grade 8, the student will be able to:~~
~~6-8.Mu.3.3.1 Create a melody when given specific guidelines.~~
~~6-8.Mu.3.3.2 Use a variety of traditional and nontraditional sound sources and electronic media when composing or performing music~~
~~6-8.Mu.3.3.3 Improvise simple rhythmic and/or melodic accompaniments.~~

~~IDAHO CONTENT STANDARDS~~
~~GRADE 9-12~~
~~HUMANITIES: MUSIC~~

~~Students are expected to know content and apply skills from previous grades.~~

~~Standard 1: Historical and Cultural Contexts~~

~~Students demonstrate an understanding of how people and cultures are connected across time. Humanities instruction prepares students to work and live as global citizens because of their greater understanding of their own culture and the cultures of others.~~

~~Students in grades 9-12 identify and compare music from a variety of cultures and historical periods. Students describe the historical, cultural, and stylistic similarities among the visual and performing arts disciplines.~~

~~Goal 1.1: Discuss the historical and cultural contexts of music.~~

~~Objective(s): By the end of high school, the student will be able to:~~

- ~~9-12.Mu.1.1.1 Identify representative musical works from a variety of cultures and historical periods.~~
- ~~9-12.Mu.1.1.2 Outline the purpose and function of a particular form of music through history.~~
- ~~9-12.Mu.1.1.3 Compare and contrast aesthetical aspects of music from different cultural perspectives.~~
- ~~9-12.Mu.1.1.4 Identify the roles of musicians in society.~~

~~Goal 1.2: Discuss the interrelationships among visual and performing arts disciplines.~~

~~Objective(s): By the end of high school, the student will be able to:~~

- ~~9-12.Mu.1.2.1 Discuss connections between the history of one art form or style and another related art form or style.~~
- ~~9-12.Mu.1.2.2 Describe similarities among different art forms across cultures.~~
- ~~9-12.Mu.1.2.3 Compare and contrast the origins of music with another core subject area (e.g., history, literature, math).~~

~~Standard 2: Critical Thinking~~

~~Students understand the purposes and functions of the arts. They build literacy and develop critical thinking through analysis and interpretation.~~

~~Students in grades 9-12 analyze and discuss musical forms, artistic styles, and common themes appearing in music throughout history. Students discuss copyright issues in music. Students develop tools necessary to evaluate musical performances constructively. Students demonstrate proper concert behavior and attire.~~

~~Goal 2.1: Conduct analyses in music.~~

~~Objective(s): By the end of high school, the student will be able to:~~

~~9-12.Mu.2.1.1 Recognize commonalities in the use of musical elements appearing in music throughout history.~~
~~9-12.Mu.2.1.2 Describe and analyze aural examples of music using correct musical terms pertaining to form, meter, rhythm, basic keys, and simple harmonic progressions.~~
~~9-12.Mu.2.1.3 Compare two contrasting musical works.~~
~~9-12.Mu.2.1.4 Discuss the similarities and differences of artistic styles of music performed.~~

~~Goal 2.2: Formulate and express opinions about musical performances.~~

~~Objective(s): By the end of high school, the student will be able to:~~

~~9-12.Mu.2.2.1 Evaluate how music participation is critical to global culture.~~
~~9-12.Mu.2.2.2 Explain personal preferences for musical styles and pieces, using proper terminology.~~
~~9-12.Mu.2.2.3 Offer an alternative for copyright infringement both for the consumer and the artist.~~
~~9-12.Mu.2.2.4 Develop criteria for high musical quality and apply it to a live musical performance.~~
~~9-12.Mu.2.2.5 Evaluate constructively the quality of one's performance and the performances of others.~~

~~Standard 3: Performance~~

~~Students engage in the creation of original works and/or the interpretation of works of others, culminating in a performance or presentation.~~

~~Students in grades 9-12 perform an instrumental or vocal part accurately utilizing skills learned and practiced. Students sight-read simple melodies and rhythms applicable to their part. Students read and perform music that contains level-appropriate technical demands, expanded ranges, and varied interpretive requirements. Students improvise simple harmonies and rhythmic and melodic ostinatos on familiar melodies. Students formulate a method of consistent and efficient musical practice.~~

~~Goal 3.1: Utilize concepts essential to music.~~

~~Objective(s): By the end of high school, the student will be able to:~~

~~9-12.Mu.3.1.1 Perform an appropriate instrumental or vocal part demonstrating rhythm and pitch accuracy, articulation and expression, following the cues from a conductor.~~
~~9-12.Mu.3.1.2 Sight-read simple melodies and rhythms in clefs applicable to the performance medium.~~
~~9-12.Mu.3.1.3 Read music that contains level-appropriate technical demands, expanded ranges, and varied interpretive requirements.~~
~~9-12.Mu.3.1.4 Formulate a method of consistent and efficient musical practice.~~

~~**Goal 3.2: Communicate through music, applying artistic concepts, knowledge, and skills.**~~

~~**Objective(s): By the end of high school, the student will be able to:**~~

~~9-12.Mu.3.2.1 Perform in groups, blending vocal/instrumental sounds, matching dynamics, breath control, phrasing, and interpretation in response to the conductor.~~
~~9-12.Mu.3.2.2 Perform in a small ensemble or as a soloist using appropriate musical technique.~~
~~9-12.Mu.3.2.3 Interpret/perform a musical selection, respecting the intent of its creator.~~
~~9-12.Mu.3.2.4 Discuss and demonstrate the importance of proper concert behavior and attire.~~
~~9-12.Mu.3.2.5 Demonstrate interpersonal skills by working collaboratively and productively with others.~~

~~**Goal 3.3: Communicate through music with creative expression.**~~

~~**Objective(s): By the end of high school, the student will be able to:**~~

~~9-12.Mu.3.3.1 Create an original harmony to accompany a melody.~~
~~9-12.Mu.3.3.2 Perform level-appropriate musical works with expression and technical accuracy.~~
~~9-12.Mu.3.3.3 Improvise rhythmic and melodic variations on given melodies.~~

IDAHO
STATE DEPARTMENT OF EDUCATION

ARTS AND HUMANITIES

MUSIC

Approved by the Idaho State Board of Education, August 11, 2016

Music: General

General Music/Creating
#MU:Cr1.1
Process Component: GMS-Imagine - Generate musical ideas for various purposes and contexts.
Anchor Standard: Generate and conceptualize artistic ideas and work.
Enduring Understanding: The creative ideas, concepts, and feelings that influence musicians' work emerge from a variety of sources.
Essential Question: How do musicians generate creative ideas?

Grade K
MU:Cr1.1.K
a. With guidance, explore and experience music concepts, such as beat and melodic contour.
b. With guidance, generate musical ideas, such as movements or motives.

Grade 1
MU:Cr1.1.1
a. With limited guidance, create musical ideas, such as answering a musical question for a specific purpose.
b. With limited guidance, generate musical ideas in multiple tonalities, such as major and minor and meters, duple and triple.

Grade 2
MU:Cr1.1.2
a. Improvise rhythmic and melodic patterns and musical ideas for a specific purpose.
b. Generate musical patterns and ideas within the context of a given tonality, such as major and minor and meter, such as duple and triple.

Grade 3
MU:Cr1.1.3
a. Improvise rhythmic and melodic ideas, and describe connection to specific purpose and context, such as personal and social.
b. Generate musical ideas, such as rhythms and melodies within a given tonality and/or meter.

Grade 4
MU:Cr1.1.4
a. Improvise rhythmic, melodic, and harmonic ideas, and explain connection to specific purpose and context, such as social and cultural.
b. Generate musical ideas, such as rhythms, melodies, and simple accompaniment patterns within related tonalities, such as major, minor and meters.

Grade 5
MU:Cr1.1.5
a. Improvise rhythmic, melodic, and harmonic ideas, and explain connection to specific purpose and context, such as social, cultural, and historical.
b. Generate musical ideas, such as rhythms, melodies, and accompaniment patterns within specific related tonalities, meters, and simple chord changes.

Grade 6
MU:Cr1.1.6
enerate simple rhythmic, melodic, and harmonic phrases within AB and ABA forms that convey expressive intent.

Novice
MU:Cr1.1.7
Generate rhythmic, melodic, and harmonic phrases and variations over harmonic accompaniments within AB, ABA, or theme and variation forms that convey expressive intent.

Proficient
MU:Cr1.1.8
Generate rhythmic, melodic and harmonic phrases and harmonic accompaniments within expanded forms which would include introductions, transitions, and codas, that convey expressive intent.

General Music/Creating
#MU:Cr2.1
Process Component: GMS-Plan and Make - Select and develop musical ideas for defined purposes and contexts.
Anchor Standard: Organize and develop artistic ideas and work.
Enduring Understanding: Musicians' creative choices are influenced by their expertise, context, and expressive intent.
Essential Question: How do musicians make creative decisions?

Grade K
MU:Cr2.1.K
a. With guidance, demonstrate and choose favorite musical ideas.
b. With guidance, organize personal musical ideas using iconic notation and/or recording technology.

Grade 1
MU:Cr2.1.1
a. With limited guidance, demonstrate and discuss personal reasons for selecting musical ideas that represent expressive intent.
b. With limited guidance, use iconic or standard notation and/or recording technology to document and organize personal musical ideas.

Grade 2
MU:Cr2.1.2
a. Demonstrate and explain personal reasons for selecting patterns and ideas for music that represent expressive intent.
b. Use iconic or standard notation and/or recording technology to combine, sequence, and document personal musical ideas.

Grade 3
MU:Cr2.1.3
a. Demonstrate selected musical ideas for a simple improvisation or composition to express intent, and describe connection to a specific purpose and context.
b. Use standard and/or iconic notation and/or recording technology to document personal rhythmic and melodic musical ideas.

Grade 4
MU:Cr2.1.4
a. Demonstrate selected and organized musical ideas for an improvisation, arrangement, or composition to express intent, and explain connection to purpose and context.
b. Use standard and/or iconic notation and/or recording technology to document personal rhythmic, melodic, and simple harmonic musical ideas.

Grade 5
MU:Cr2.1.5
a. Demonstrate selected and developed musical ideas for improvisations, arrangements, or compositions to express intent, and explain connection to purpose and context.
b. Use standard and/or iconic notation and/or recording technology to document personal rhythmic, melodic, and two-chord harmonic musical ideas.

Grade 6
MU:Cr2.1.6
a. Select, organize, construct, and document personal musical ideas for arrangements and compositions within AB or ABA form that demonstrate an effective beginning, middle, and ending, and convey expressive intent.
b. Use standard and/or iconic notation and/or audio/ video recording to document personal simple rhythmic phrases, melodic phrases, and two-chord harmonic musical ideas.

Novice
MU:Cr2.1.7
a. Select, organize, develop, and document personal musical ideas for arrangements, songs, and compositions within AB, ABA, or theme and variation forms that demonstrate unity and variety and convey expressive intent.
b. Use standard and/or iconic notation and/or audio/ video recording to document personal simple rhythmic phrases, melodic phrases, and harmonic sequences.

Proficient
MU:Cr2.1.8
a. Select, organize, develop, and document musical ideas for arrangements, songs, and compositions within expanded forms that demonstrate tension and release, unity and variety, balance, and convey expressive intent.
b. Use standard and/or iconic notation and/or audio/ video recording to document personal rhythmic phrases, melodic phrases, and harmonic sequences.

General Music/Creating
#MU:Cr3.1
Process Component: GMS-Evaluate and Refine -Evaluate and refine selected musical ideas to create musical work that meets appropriate criteria.
Anchor Standard: Refine and complete artistic work.
Enduring Understanding: Musicians evaluate, and refine their work through openness to new ideas, persistence, and the application of appropriate criteria.
Essential Question: How do musicians improve the quality of their creative work?

Grade K

MU:Cr3.1.K
With guidance, apply personal, peer, and teacher feedback in refining personal musical ideas.

Grade 1
MU:Cr3.1.1
With limited guidance, discuss and apply personal, peer, and teacher feedback to refine personal musical ideas.

Grade 2
MU:Cr3.1.2
Interpret and apply personal, peer, and teacher feedback to revise personal music.

Grade 3
MU:Cr3.1.3
Evaluate, refine, and document revisions to personal musical ideas, applying teacher-provide and collaboratively-developed criteria and feedback.

Grade 4
MU:Cr3.1.4
Evaluate, refine, and document revisions to personal music, applying teacher-provided and collaboratively developed criteria and feedback to show improvement over time.

Grade 5
MU:Cr3.1.5
Evaluate, refine, and document revisions to personal music, applying teacher-provided and collaboratively-developed criteria and feedback, and explain rationale for changes.

Grade 6
MU:Cr3.1.6
a. Evaluate their own work, applying teacher-provided criteria such as application of selected elements of music and use of sound sources.
b .Describe the rationale for making revisions to the music based on evaluation criteria and feedback from their teacher.

Novice
MU:Cr3.1.7
a. Evaluate one's own work, applying selected criteria such as appropriate application of elements of music, including style, form, and use of sound sources.
b. Describe the rationale for making revisions to the music based on evaluation criteria and feedback from others, which would include the teacher and peers.

Proficient
MU:Cr3.1.8
a. Evaluate one's own work by selecting and applying criteria including appropriate application of compositional techniques, style, form, and use of sound sources.
b. Describe the rationale for refining works by explaining the choices, based on evaluation criteria.

General Music/Creating
#MU:Cr3.2

Process Component: GMS-Present - Share creative musical work that conveys intent, demonstrates craftsmanship, and exhibits originality.
Anchor Standard: Refine and complete artistic work.
Enduring Understanding: Musicians' presentation of creative work is the culmination of a process of creation and communication.
Essential Question: When is creative work ready to share?

Grade K
MU:Cr3.2.K
With guidance, demonstrate a final version of personal musical ideas to peers.

Grade 1
MU:Cr3.2.1
With limited guidance, convey expressive intent for a specific purpose by presenting a final version of personal musical ideas to peers or informal audience.

Grade 2
MU:Cr3.2.2
Convey expressive intent for a specific purpose by presenting a final version of personal musical ideas to peers or informal audience.

Grade 3
MU:Cr3.2.3
Present the final version of personal created music to others, and describe connection to expressive intent.

Grade 4
MU:Cr3.2.4
Present the final version of personal created music to others, and explain connection to expressive intent.

Grade 5
MU:Cr3.2.5
Present the final version of personal created music to others that demonstrates craftsmanship, and explain connection to expressive intent.

Grade 6
MU:Cr3.2.6
Present the final version of their documented personal composition or arrangement, using craftsmanship and originality to demonstrate an effective beginning, middle, and ending, and convey expressive intent.

Novice
MU:Cr3.2.7
Present the final version of their personal documented personal composition, song, or arrangement, using craftsmanship and originality to demonstrate unity and variety, and convey expressive intent.

Proficient
MU:Cr3.2.8

Present the final version of their documented composition, song, or arrangement, using craftsmanship and originality to demonstrate the application of compositional techniques for creating unity and variety, tension and release, and balance to convey expressive intent.

General Music/Performing
#MU:Pr4.1
Process Component: GMS-Select - Select varied musical works to present based on interest, knowledge, technical skill, and context.
Anchor Standard: Select, analyze and interpret artistic work for presentation.
Enduring Understanding: Performers' interest in and knowledge of musical works, understanding of their own technical skill, and the context for a performance influence the selection of repertoire.
Essential Question: How do performers select repertoire?

Grade K
MU:Pr4.1.K
With guidance, demonstrate and state personal interest in varied musical selections.

Grade 1
MU:Pr4.1.1
With limited guidance, demonstrate and discuss personal interest in, knowledge about, and purpose of varied musical selections.

Grade 2
MU:Pr4.1.2
Demonstrate and explain personal interest in, knowledge about, and purpose of varied musical selections.

Grade 3
MU:Pr4.1.3
Demonstrate and explain how the selection of music to perform is influenced by personal interest, knowledge, purpose, and context.

Grade 4
MU:Pr4.1.4
Demonstrate and explain how the selection of music to perform is influenced by personal interest, knowledge, context, and technical skill.

Grade 5
MU:Pr4.1.5
Demonstrate and explain how the selection of music to perform is influenced by personal interest, knowledge, and context, as well as their personal and others' technical skill.

Grade 6
MU:Pr4.1.6
Apply teacher-provided criteria for selecting music to perform for a specific purpose and/or context, and explain why each was chosen.

Novice
MU:Pr4.1.7

Apply collaboratively-developed criteria for selecting music of contrasting styles for a program with a specific purpose and/or context and, after discussion, identify expressive qualities, technical challenges, and reasons for choices.

Proficient
MU:Pr4.1.8
Apply personally-developed criteria for selecting music of contrasting styles for a program with a specific purpose and/or context, and explain expressive qualities, technical challenges, and reasons for choices.

General Music/Performing
#MU:Pr4.2
Process Component: GMS-Analyze - Analyze the structure and context of varied musical works and their implications for performance.
Anchor Standard: Select, analyze and interpret artistic work for presentation.
Enduring Understanding: Analyzing creators' context and how they manipulate elements of music provides insight into their intent and informs performance.
Essential Question: How does understanding the structure and context of musical works inform performance?

Grade K
MU:Pr4.2.K
With guidance, explore and demonstrate awareness of music contrasts, (e.g., high/low, loud/soft, same/different) in a variety of music selected for performance.

Grade 1
MU:Pr4.2.1
a. With limited guidance, demonstrate knowledge of music concepts, such as beat and melodic contour in music from a variety of cultures selected for performance.
b. Read and perform rhythmic patterns using iconic or standard notation when analyzing selected music.

Grade 2
MU:Pr4.2.2
a. Demonstrate knowledge of music concepts, such as tonality and meter in music from a variety of cultures selected for performance.
b. Read and perform rhythmic and melodic patterns using iconic or standard notation when analyzing selected music.

Grade 3
MU:Pr4.2.3
a. Demonstrate understanding of the structure in music selected for performance.
b. Read and perform rhythmic patterns and melodic phrases using iconic and standard notation when analyzing selected music.
c. Describe how context, such as personal and social, can inform a performance.

Grade 4
MU:Pr4.2.4
a. Demonstrate understanding of the structure and the elements of music, (e.g., rhythm, pitch, and form) in music selected for performance.

b. Read and perform using iconic and/or standard notation when analyzing selected music.
c. Explain how social and cultural context informs a performance.

Grade 5
MU:Pr4.2.5
a. Demonstrate understanding of the structure and the elements of music, (e.g., rhythm, pitch, form, and harmony) in music selected for performance.
b. Read and perform using standard notation when analyzing selected music.
c. Explain how context, such as social, cultural, and historical informs performances.

Grade 6
MU:Pr4.2.6
a. Explain how understanding the structure and the elements of music are used in music selected for performance.
b. Read and identify by name or function standard symbols for rhythm, pitch, articulation, and dynamics when analyzing selected music.
c. Identify how cultural and historical context inform performances.

Novice
MU:Pr4.2.7
a. Explain and demonstrate the structure of contrasting pieces of music selected for performance and how elements of music are used.
b. Read and identify by name or function standard symbols
for rhythm, pitch articulation, dynamics, tempo, and form when analyzing selected music.
c. Identify how cultural and historical context inform performances and result in different music interpretations.

Proficient
MU:Pr4.2.8
a. Compare the structure of contrasting pieces of music selected for performance, explaining how the elements of music are used in each.
b. Sight-read in treble or bass clef simple rhythmic, melodic, and/or harmonic notation when analyzing selected music.
c. Identity how cultural and historical context inform performances and result in different musical effects.

General Music/Performing
#MU:Pr4.3
Process Component: GMS-Interpret - Develop personal interpretations that consider creators' intent.
Anchor Standard: Select, analyze and interpret artistic work for presentation.
Enduring Understanding: Performers make interpretive decisions based on their understanding of context and expressive intent.
Essential Question: How do performers interpret musical works?

Grade K
MU:Pr4.3.K
With guidance, demonstrate awareness of expressive qualities (e.g., voice quality, dynamics, and tempo) that support the creator's expressive intent.

Grade 1
MU:Pr4.3.1
Demonstrate and describe music's expressive qualities (e.g., dynamics and tempo).

Grade 2
MU:Pr4.3.2
Demonstrate understanding of expressive qualities (e.g., dynamics and tempo) and how creators use them to convey expressive intent.

Grade 3
MU:Pr4.3.3
Demonstrate and describe how intent is conveyed through expressive qualities (e.g., dynamics and tempo).

Grade 4
MU:Pr4.3.4
Demonstrate and explain how intent is conveyed through interpretive decisions and expressive qualities (e.g., dynamics, tempo, and timbre).

Grade 5
MU:Pr4.3.5
Demonstrate and explain how intent is conveyed through interpretive decisions and expressive qualities (e.g., dynamics, tempo, timbre, and articulation/style).

Grade 6
MU:Pr4.3.6
Perform a selected piece of music demonstrating how their interpretations of the elements of music and the expressive qualities (e.g., dynamics, tempo, timbre, articulation/style, and phrasing) convey intent.

Novice
MU:Pr4.3.7
Perform contrasting pieces of music demonstrating their interpretations of the elements of music and expressive qualities (e.g., dynamics, tempo, timbre, articulation/style, and phrasing) convey intent.

Proficient
MU:Pr4.3.8
Perform contrasting pieces of music, demonstrating as well as explaining how the music's intent is conveyed by their interpretations of the elements of music and expressive qualities (e.g., dynamics, tempo, timbre, articulation/style, and phrasing).

General Music/Performing
#MU:Pr5.1
Process Component: GMS-Rehearse, Evaluate and Refine - Evaluate and refine personal and ensemble performances, individually or in collaboration with others.
Anchor Standard: Develop and refine artistic techniques and work for presentation.
Enduring Understanding: To express their musical ideas, musicians analyze, evaluate, and refine their performance over time through openness to new ideas, persistence, and the application of appropriate criteria.
Essential Question: How do musicians improve the quality of their performance?

Grade K
MU:Pr5.1.K
a. With guidance, apply personal, teacher, and peer feedback to refine performances.
b. With guidance, use suggested strategies in rehearsal to improve the expressive qualities of music.

Grade 1
MU:Pr5.1.1
a. With limited guidance, apply personal, teacher, and peer feedback to refine performances.
b. With limited guidance, use suggested strategies in rehearsal to address interpretive challenges of music.

Grade 2
MU:Pr5.1.2
a. Apply established criteria to judge the accuracy, expressiveness, and effectiveness of performances.
b. Rehearse, identify, and apply strategies to address interpretive, performance, and technical challenges of music.

Grade 3
MU:Pr5.1.3
a. Apply teacher-provided and collaboratively-developed criteria and feedback to evaluate accuracy of ensemble performances.
b. Rehearse to refine technical accuracy, expressive qualities, and identified performance challenges.

Grade 4
MU:Pr5.1.4
a. Apply teacher-provided and collaboratively-developed criteria and feedback to evaluate accuracy and expressiveness of ensemble and personal performances.
b. Rehearse to refine technical accuracy and expressive qualities, and address performance challenges.

Grade 5
MU:Pr5.1.5
a. Apply teacher-provided and established criteria and feedback to evaluate the accuracy and expressiveness of ensemble and personal performances.
b. Rehearse to refine technical accuracy and expressive qualities to address challenges, and show improvement over time.

Grade 6
MU:Pr5.1.6
Identify and apply teacher-provided criteria (such as correct interpretation of notation, technical accuracy, originality, and interest) to rehearse, refine, and determine when a piece is ready to perform.

Novice
MU:Pr5.1.7
Identify and apply collaboratively-developed criteria, (e.g., demonstrating correct interpretation of notation, technical skill of performer, originality, emotional impact, and interest) to rehearse, refine, and determine when the music is ready to perform.

Proficient
MU:Pr5.1.8

Identify and apply personally-developed criteria, (e.g., demonstrating correct interpretation of notation, technical skill of performer, originality, emotional impact, variety, and interest) to rehearse, refine, and determine when the music is ready to perform.

General Music/Performing
#MU:Pr6.1
Process Component: GMS-Present - Perform expressively, with appropriate interpretation and technical accuracy, and in a manner appropriate to the audience and context.
Anchor Standard: Convey meaning through the presentation of artistic work.
Enduring Understanding: Musicians judge performance based on criteria that vary across time, place, and cultures. The context and how a work is presented influence the audience response.
Essential Question: When is a performance judged ready to present? How do context and the manner in which musical work is presented influence audience response?

Grade K
MU:Pr6.1.K
a. With guidance, perform music with expression.
b. Perform appropriately for the audience.

Grade 1
MU:Pr6.1.1
a. With limited guidance, perform music for a specific purpose with expression.
b. Perform appropriately for the audience and purpose.

Grade 2
MU:Pr6.1.2
a. Perform music for a specific purpose with expression and technical accuracy.
b. Perform appropriately for the audience and purpose.

Grade 3
MU:Pr6.1.3
a. Perform music with expression and technical accuracy.
b. Demonstrate performance decorum and audience etiquette appropriate for the context and venue.

Grade 4
MU:Pr6.1.4
a. Perform music, alone or with others, with expression and technical accuracy, and appropriate interpretation.
b. Demonstrate performance decorum and audience etiquette appropriate for the context, venue, and genre.

Grade 5
MU:Pr6.1.5
a. Perform music, alone or with others, with expression, technical accuracy, and appropriate interpretation.
b. Demonstrate performance decorum and audience etiquette appropriate for the context, venue, genre, and style.

Grade 6

MU:Pr6.1.6
a. Perform the music with technical accuracy to convey the creator's intent.
b. Demonstrate performance decorum, (e.g., stage presence, attire, behavior and audience etiquette), appropriate for venue and purpose.

Novice
MU:Pr6.1.7
a. Perform the music with technical accuracy and stylistic expression to convey the creator's intent.
b. Demonstrate performance decorum, (e.g., stage presence, attire, behavior and audience etiquette), appropriate for venue, purpose, and context.

Proficient
MU:Pr6.1.8
a. Perform the music with technical accuracy, stylistic expression, and culturally authentic practices in music to convey the creator's intent.
b. Demonstrate performance decorum, (e.g., stage presence, attire, behavior and audience etiquette) appropriate for venue, purpose, context, and style.

General Music/Responding
#MU:Re7.1
Process Component: GMS-Select - Choose music appropriate for a specific purpose or context.
Anchor Standard: Perceive and analyze artistic work.
Enduring Understanding: Individuals' selection of musical works is influenced by their interests, experiences, understandings, and purposes.
Essential Question: How do individuals choose music to experience?

Grade K
MU:Re7.1.K
With guidance, list personal interests and experiences, and demonstrate why they prefer some music selections over others.

Grade 1
MU:Re7.1.1
With limited guidance, identify and demonstrate how personal interests and experiences influence musical selection for specific purposes.

Grade 2
MU:Re7.1.2
Explain and demonstrate how personal interests and experiences influence musical selection for specific purposes.

Grade 3
MU:Re7.1.3
Demonstrate and describe how selected music connects to and is influenced by specific interests, experiences, or purposes.

Grade 4
MU:Re7.1.4

Demonstrate and explain how selected music connects to and is influenced by specific interests, experiences, purposes, or contexts.

Grade 5
MU:Re7.1.5
Demonstrate and explain, citing evidence, how selected music connects to and is influenced by specific interests, experiences, purposes, or contexts.

Grade 6
MU:Re7.1.6
Select or choose music to listen to and explain the connections to specific interests or experiences for a specific purpose.

Novice
MU:Re7.1.7
Select or choose contrasting music to listen to and compare the connections to specific interests or experiences for a specific purpose.

Proficient
MU:Re7.1.8
Select programs of music ,such as a CD mix or live performances, and demonstrate the connections to an interest or experience for a specific purpose.

General Music/Responding
#MU:Re7.2
Process Component: GMS-Analyze - Analyze how the structure and context of varied musical works inform the response.
Anchor Standard: Perceive and analyze artistic work.
Enduring Understanding: Response to music is informed by analyzing context, (e.g., social, cultural, and historical) and how creators and performers manipulate the elements of music.
Essential Question: How does understanding the structure and context of music inform a response?

Grade K
MU:Re7.2.K
With guidance, demonstrate how a specific music concept, such as beat or melodic direction, is used in music.

Grade 1
MU:Re7.2.1
With limited guidance, demonstrate and identify how specific music concepts, such as beat or pitch, are used in various styles of music for a purpose.

Grade 2
MU:Re7.2.2
Describe how specific music concepts are used to support a specific purpose in music.

Grade 3
MU:Re7.2.3

Demonstrate and describe how a response to music can be informed by the structure, the use of the elements of music, and context, such as personal and social.

Grade 4
MU:Re7.2.4
Demonstrate and explain how responses to music are informed by the structure, the use of the elements of music, and context, such as social and cultural.

Grade 5
MU:Re7.2.5
Demonstrate and explain, citing evidence, how responses to music are informed by the structure, the use of the elements of music, and context, such as social, cultural, and historical.

Grade 6
MU:Re7.2.6
a. Describe how the elements of music and expressive qualities relate to the structure of the pieces
b. Identify the context of music from a variety of genres, cultures, and historical periods.

Novice
MU:Re7.2.7
a. Classify and explain how the elements of music and expressive qualities relate to the structure of contrasting pieces.
b. Identify and compare the context of music from a variety of genres, cultures, and historical periods.

Proficient
MU:Re7.2.8
a. Compare how the elements of music and expressive qualities relate to the structure within programs of music.
b. Identify and compare the context of programs of music from a variety of genres, cultures, and historical periods.

General Music/Responding
#MU:Re8.1
Process Component: GMS-Interpret - Support interpretations of musical works that reflect creators'/performers' expressive intent.
Anchor Standard: Interpret intent and meaning in artistic work.
Enduring Understanding: Through their use of elements and structures of music, creators and performers provide clues to their expressive intent.
Essential Question: How do we discern the musical creators' and performers' expressive intent?

Grade K
MU:Re8.1.K
With guidance, demonstrate awareness of expressive qualities, such as dynamics and tempo that reflect creators' /performers' expressive intent.

Grade 1
MU:Re8.1.1
With limited guidance, demonstrate and identify expressive qualities, such as dynamics and tempo that reflect creators' /performers' expressive intent.

Grade 2
MU:Re8.1.2
Demonstrate knowledge of music concepts and how they support creators'/performers' expressive intent.

Grade 3
MU:Re8.1.3
Demonstrate and describe how the expressive qualities, such as dynamics and tempo, are used in performers' interpretations to reflect expressive intent.

Grade 4
MU:Re8.1.4
Demonstrate and explain how the expressive qualities, such as dynamics, tempo, and timbre, are used in performers' and personal interpretations to reflect expressive intent.

Grade 5
MU:Re8.1.5
Demonstrate and explain how the expressive qualities, such as dynamics, tempo, timbre, and articulation, are used in performers' and personal interpretations to reflect expressive intent.

Grade 6
MU:Re8.1.6
Describe a personal interpretation of how creators' and performers' application of the elements of music and expressive qualities, within genres and cultural and historical context, convey expressive intent.

Novice
MU:Re8.1.7
Describe a personal interpretation of contrasting works and explain how creators' and performers' application of the elements of music and expressive qualities, within genres, cultures, and historical periods, convey expressive intent.

Proficient
MU:Re8.1.8
Support personal interpretation of contrasting programs of music and explain how creators' or performers' apply the elements of music and expressive qualities, within genres, cultures, and historical periods to convey expressive intent.

General Music/Responding
#MU:Re9.1
Process Component: GMS-Evaluate - Support evaluations of musical works and performances based on analysis, interpretation, and established criteria.
Anchor Standard: Apply criteria to evaluate artistic work.
Enduring Understanding: The personal evaluation of musical work(s) and performance(s) is informed by analysis, interpretation, and established criteria.
Essential Question: How do we judge the quality of musical work(s) and performance(s)?

Grade K

MU:Re9.1.K
With guidance, apply personal and expressive preferences in the evaluation of music.

Grade 1
MU:Re9.1.1
With limited guidance, apply personal and expressive preferences in the evaluation of music for specific purposes.

Grade 2
MU:Re9.1.2
Apply personal and expressive preferences in the evaluation of music for specific purposes.

Grade 3
MU:Re9.1.3
Evaluate musical works and performances, applying established criteria, and describe appropriateness to the context.

Grade 4
MU:Re9.1.4
Evaluate musical works and performances, applying established criteria, and explain appropriateness to the context.

Grade 5
MU:Re9.1.5
Evaluate musical works and performances, applying established criteria, and explain appropriateness to the context, citing evidence from the elements of music.

Grade 6
MU:Re9.1.6
Apply teacher-provided criteria to evaluate musical works or performances.

Novice
MU:Re9.1.7
Select from teacher-provided criteria to evaluate musical works or performances.

Proficient
MU:Re9.1.8
Apply appropriate personally-developed criteria to evaluate musical works or performances.

General Music/Connecting
#MU:Cn10.0
Process Component: GMS-Connect #10- Synthesize and relate knowledge and personal experiences to make music.
Anchor Standard: Synthesize and relate knowledge and personal experiences to make art.
Enduring Understanding: Musicians connect their personal interests, experiences, ideas, and knowledge to creating, performing, and responding.
Essential Question: How do musicians make meaningful connections to creating, performing, and responding?

Grade K

MU:Cn10.0.K
Demonstrate how interests, knowledge, and skills relate to personal choices and intent when creating, performing, and responding to music.

Grade 1
MU:Cn10.0.1
Demonstrate how interests, knowledge, and skills relate to personal choices and intent when creating, performing, and responding to music.

Grade 2
MU:Cn10.0.2
Demonstrate how interests, knowledge, and skills relate to personal choices and intent when creating, performing, and responding to music.

Grade 3
MU:Cn10.0.3
Demonstrate how interests, knowledge, and skills relate to personal choices and intent when creating, performing, and responding to music.

Grade 4
MU:Cn10.0.4
Demonstrate how interests, knowledge, and skills relate to personal choices and intent when creating, performing, and responding to music.

Grade 5
MU:Cn10.0.5
Demonstrate how interests, knowledge, and skills relate to personal choices and intent when creating, performing, and responding to music.

Grade 6
MU:Cn10.0.6
Demonstrate how interests, knowledge, and skills relate to personal choices and intent when creating, performing, and responding to music.

Novice
MU:Cn10.0.7
Demonstrate how interests, knowledge, and skills relate to personal choices and intent when creating, performing, and responding to music.

Proficient
MU:Cn10.0.8
Demonstrate how interests, knowledge, and skills relate to personal choices and intent when creating, performing, and responding to music.

General Music/Connecting
#MU:Cn11.0
Process Component: GMS-Connect #11- Relate musical ideas and works with varied context to deepen understanding.

Anchor Standard: Relate artistic ideas and works with societal, cultural and historical context to deepen understanding.
Enduring Understanding: Understanding connections to varied contexts and daily life enhances musicians' creating, performing, and responding.
Essential Question: How do the other arts, other disciplines, contexts, and daily life inform creating, performing, and responding to music?

Grade K
MU:Cn11.0.K
Demonstrate understanding of relationships between music and the other arts, other disciplines, varied contexts, and daily life.

Grade 1
MU:Cn11.0.1
Demonstrate understanding of relationships between music and the other arts, other disciplines, varied contexts, and daily life.

Grade 2
MU:Cn11.0.2
Demonstrate understanding of relationships between music and the other arts, other disciplines, varied contexts, and daily life.

Grade 3
MU:Cn11.0.3
Demonstrate understanding of relationships between music and the other arts, other disciplines, varied contexts, and daily life.

Grade 4
MU:Cn11.0.4
Demonstrate understanding of relationships between music and the other arts, other disciplines, varied contexts, and daily life.

Grade 5
MU:Cn11.0.5
Demonstrate understanding of relationships between music and the other arts, other disciplines, varied contexts, and daily life.

Grade 6
MU:Cn11.0.6
Demonstrate understanding of relationships between music and the other arts, other disciplines, varied contexts, and daily life.

Novice
MU:Cn11.0.7
Demonstrate understanding of relationships between music and the other arts, other disciplines, varied contexts, and daily life.

Proficient
MU:Cn11.0.8

Demonstrate understanding of relationships between music and the other arts, other disciplines, varied contexts, and daily life.

General Music Theory Composition/Responding
#MU:Re7.2.C
Process Component: GMS-Analyze - Analyze how the structure and context of varied musical works inform the response.
Anchor Standard: Perceive and analyze artistic work.
Enduring Understanding: Response to music is informed by analyzing context (social, cultural, and historical) and how creators and performers manipulate the elements of music.
Essential Question: How does understanding the structure and context of music inform a response?

Grade K
MU:Re7.2.C.K
With guidance, demonstrate how a specific music concept, such as beat or melodic direction, is used in music.

Grade 1
MU:Re7.2.C.1
With limited guidance, demonstrate and identify how specific music concepts, such as beat or pitch, are used in various styles of music for a purpose.

Grade 2
MU:Re7.2.C.2
Describe how specific music concepts are used to support a specific purpose in music.

Grade 3
MU:Re7.2.C.3
Demonstrate and describe how a response to music can be informed by the structure, the use of the elements of music, and context, such as personal and social.

Grade 4
MU:Re7.2.C.4
Demonstrate and explain how responses to music are informed by the structure, the use of the elements of music, and context, such as social and cultural.

Grade 5
MU:Re7.2.C.5
Demonstrate and explain, citing evidence, how responses to music are informed by the structure, the use of the elements of music, and context ,such as social, cultural, and historical.

Grade 6
MU:Re7.2.C.6
a. Describe how the elements of music and expressive qualities relate to the structure of the pieces
b. Identify the context of music from a variety of genres, cultures, and historical periods.

Novice
MU:Re7.2.C.7

a. Classify and explain how the elements of music and expressive qualities relate to the structure of contrasting pieces.
b. Identify and compare the context of music from a variety of genres, cultures, and historical periods.

Proficient
MU:Re7.2.C.8
a. Compare how the elements of music and expressive qualities relate to the structure within programs of music.
b. Identify and compare the context of programs of music from a variety of genres, cultures, and historical periods.

General Music Harmonizing Instruments/Performing (e.g. Keyboard/Guitar)
#MU:Pr4.2.H
Process Component: GMS-Analyze - Analyze the structure and context of varied musical works and their implications for performance.
Anchor Standard: Select, analyze and interpret artistic work for presentation.
Enduring Understanding: Analyzing creators' context and how they manipulate elements of music provides insight into their intent and informs performance.
Essential Question: How does understanding the structure and context of musical works inform performance?

Grade K
MU:Pr4.2.H.K
With guidance, explore and demonstrate awareness of music contrasts, (e.g., high/low, loud/soft, same/different), in a variety of music selected for performance.

Grade 1
MU:Pr4.2.H.1
a. With limited guidance, demonstrate knowledge of music concepts, such as beat and melodic contour in music from a variety of cultures selected for performance.
b. When analyzing selected music, read and perform rhythmic patterns using iconic or standard notation.

Grade 2
MU:Pr4.2.H.2
a. Demonstrate knowledge of music concepts, such as tonality and meter in music from a variety of cultures selected for performance.
b. When analyzing selected music, read and perform rhythmic and melodic patterns using iconic or standard notation.

Grade 3
MU:Pr4.2.H.3
a. Demonstrate understanding of the structure in music selected for performance.
b. When analyzing selected music, read and perform rhythmic patterns and melodic phrases using iconic and standard notation.
c. Describe how context, such as personal and social, can inform a performance.

Grade 4
MU:Pr4.2.H.4

a. Demonstrate understanding of the structure and the elements of music, such as rhythm, pitch, and form, in music selected for performance.
b. When analyzing selected music, read and perform using iconic and/or standard notation.
c. Explain how context, such as social and cultural, informs a performance.

Grade 5
MU:Pr4.2.H.5
a. Demonstrate understanding of the structure and the elements of music (such as rhythm, pitch, form, and harmony) in music selected for performance.
b. When analyzing selected music, read and perform using standard notation.
c. Explain how context (e.g., social, cultural, and historical) informs performances.

Grade 6
MU:Pr4.2.H.6
a. Explain how understanding the structure and the elements of music are used in music selected for performance.
b. When analyzing selected music, read and identify by name or function standard symbols for rhythm, pitch, articulation, and dynamics.
c. Identify how cultural and historical context inform performances.

Grade 7
MU:Pr4.2.H.7
a. Explain and demonstrate the structure of contrasting pieces of music selected for performance and how elements of music are used.
b. When analyzing selected music, read and identify by name or function standard symbols for rhythm, pitch articulation, dynamics, tempo, and form.
c. Identify how cultural and historical context inform performances and result in different music interpretations.

Grade 8
MU:Pr4.2.H.8
a. Compare the structure of contrasting pieces of music selected for performance, explaining how the elements of music are used in each.
b. When analyzing selected music, sight-read in treble or bass clef simple rhythmic, melodic, and/or harmonic notation.
c. Identity how cultural and historical context inform performances and result in different musical effects.

General Music Theory Composition/Responding
#MU:Re7.2.C
Process Component: GMS-Analyze - Analyze how the structure and context of varied musical works inform the response.
Anchor Standard: Perceive and analyze artistic work.
Enduring Understanding: Response to music is informed by analyzing context (social, cultural, and historical) and how creators and performers manipulate the elements of music.
Essential Question: How does understanding the structure and context of music inform a response?

Grade K
MU:Re7.2.C.K

With guidance, demonstrate how a specific music concept (such as beat or melodic direction) is used in music.

Grade 1
MU:Re7.2.C.1
With limited guidance, demonstrate and identify how specific music concepts, such as beat or pitch, are used in various styles of music for a purpose.

Grade 2
MU:Re7.2.C.2
Describe how specific music concepts are used to support a specific purpose in music.

Grade 3
MU:Re7.2.C.3
Demonstrate and describe how a response to music can be informed by the structure, the use of the elements of music, and context, such as personal and social.

Grade 4
MU:Re7.2.C.4
Demonstrate and explain how responses to music are informed by the structure, the use of the elements of music, and context, such as social and cultural.

Grade 5
MU:Re7.2.C.5
Demonstrate and explain, citing evidence, how responses to music are informed by the structure, the use of the elements of music, and context, (e.g., social, cultural, and historical).
Grade 6
MU:Re7.2.C.6
a. Describe how the elements of music and expressive qualities relate to the structure of the pieces
b. Identify the context of music from a variety of genres, cultures, and historical periods.

Novice
MU:Re7.2.C.7
a. Classify and explain how the elements of music and expressive qualities relate to the structure of contrasting pieces.
b. Identify and compare the context of music from a variety of genres, cultures, and historical periods.

Proficient
MU:Re7.2.C.8
a. Compare how the elements of music and expressive qualities relate to the structure within programs of music.
b. Identify and compare the context of programs of music from a variety of genres, cultures, and historical periods.

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Music: Harmonizing Instruments

Music Harmonizing Instruments/Creating
#MU:Cr1.1
Process Component: MHI-Imagine- Generate musical ideas for various purposes and contexts.
Anchor Standard: Generate and conceptualize artistic ideas and work.
Enduring Understanding: The creative ideas, concepts, and feelings that influence musicians' work emerge from a variety of sources.
Essential Question: How do musicians generate creative ideas?

Novice
MU:Cr1.1. Novice
Generate melodic, rhythmic, and harmonic ideas for simple melodies, such as two-phrase, and chordal accompaniments for given melodies.

Intermediate
MU:Cr1.1. Intermediate
Generate melodic, rhythmic, and harmonic ideas for melodies (created over specified chord progressions or AB/ABA forms) and two-to-three-chord accompaniments for given melodies.

Proficient
MU:Cr1.1. I
Generate melodic, rhythmic, and harmonic ideas for improvisations, compositions, (forms such as theme and variation or 12-bar blues), and three-or-more-chord accompaniments in a variety of patterns (e.g., arpeggio, country, gallop strumming, finger picking).

Advanced
MU:Cr1.1. III
Generate melodic, rhythmic, and harmonic ideas for a collection of compositions representing a variety of forms and styles, improvisations in several different styles, and stylistically appropriate harmonizations for given melodies.

Music Harmonizing Instruments/Creating
#MU:Cr2.1.H
Process Component: MHI-Plan and Make - Select and develop musical ideas for defined purposes and contexts.
Anchor Standard: Organize and develop artistic ideas and work.
Enduring Understanding: Musicians' creative choices are influenced by their expertise, context, and expressive intent.
Essential Question: How do musicians make creative decisions?

Novice
MU:Cr2.1.H. Novice

Select, develop, and use standard notation or audio/video recording to document melodic, rhythmic, and harmonic ideas for drafts of simple melodies (such as two-phrase) and chordal accompaniments for given melodies.

Intermediate
MU:Cr2.1.H. Intermediate
Select, develop, and use standard notation and audio/video recording to document melodic, rhythmic, and harmonic ideas for drafts of melodies (created over specified chord progressions or AB/ABA forms) and two-to-three-chord accompaniments for given melodies.

Proficient
MU:Cr2.1.H. I
Select, develop, and use standard notation and audio/video recording to document melodic, rhythmic, and harmonic ideas for drafts of improvisations, compositions (forms such as theme and variation or 12-bar blues), and three-or-more-chord accompaniments in a variety of patterns (e.g., arpeggio, country and gallop strumming, finger picking).

Advanced
MU:Cr2.1.H. III
Select, develop, and use standard notation and audio/video recording to document melodic, rhythmic, and harmonic ideas for drafts of compositions representing a variety of forms and styles, improvisations in several different styles, and stylistically appropriate harmonizations for given melodies.

Music Harmonizing Instruments/Creating
#MU:Cr3.1.H
Process Component: MHI-Evaluate and Refine - Evaluate and refine selected musical ideas to create musical work that meets appropriate criteria.
Anchor Standard: Refine and complete artistic work.
Enduring Understanding: Musicians evaluate and refine their work through openness to new ideas, persistence, and the application of appropriate criteria.
Essential Question: How do musicians improve the quality of their creative work?

Novice
MU:Cr3.1.H. Novice
Apply teacher-provided criteria to critique, improve, and refine drafts of simple melodies (such as two-phrase) and chordal accompaniments for given melodies.

Intermediate
MU:Cr3.1.H. Intermediate
Apply teacher-provided criteria to critique, improve, and refine drafts of melodies (created over specified chord progressions or AB/ABA forms) and two-to-three-chord accompaniments for given melodies.

Proficient
MU:Cr3.1.H. I
Identify, describe, and apply teacher-provided criteria to assess and refine the technical and expressive aspects of evolving drafts leading to final versions.

Advanced

MU:Cr3.1.H. III
Research, identify, explain, and apply personally-developed criteria to assess and refine the technical and expressive aspects of evolving drafts leading to final versions.

Music Harmonizing Instruments/Creating
#MU:Cr3.2.H
Process Component: MHI-Present - Perform expressively, with appropriate interpretation and technical accuracy, and in a manner appropriate to the audience and context.
Anchor Standard: Refine and complete artistic work.
Enduring Understanding: Musicians' presentation of creative work is the culmination of a process of creation and communication.
Essential Question: When is creative work ready to share?

Novice
MU:Cr3.2.H. Novice
Perform with expression and technical accuracy in individual performances of a varied repertoire of music that includes melodies, repertoire pieces, and chordal accompaniments, demonstrating understanding of the audience and the context.

Intermediate
MU:Cr3.2.H. Intermediate
Perform with expression and technical accuracy in individual performances of a varied repertoire of music that includes melodies, repertoire pieces, and chordal accompaniments, demonstrating sensitivity to the audience and an understanding of the context (social, cultural, or historical).

Proficient
MU:Cr3.2.H. I
Perform with expression and technical accuracy, in individual and small group performances, a varied repertoire of music that includes melodies, repertoire pieces, improvisations, and chordal accompaniments in a variety of patterns (e.g., arpeggio, country and gallop strumming, finger picking), demonstrating sensitivity to the audience and an understanding of the context (social, cultural, or historical).

Advanced
MU:Cr3.2.H. III
Perform with expression and technical accuracy, in individual and small group performances, a varied repertoire for programs of music that includes melodies, repertoire pieces, stylistically appropriate accompaniments, and improvisations in a variety of contrasting styles, demonstrating sensitivity to the audience and an understanding of the context (social, cultural, and historical).

Music Harmonizing Instruments/Performing
#MU:Pr4.1.H
Process Component: MHI-Select- Select varied musical works to present based on interest, knowledge, technical skill, and context.
Anchor Standard: Select, analyze and interpret artistic work for presentation.

Enduring Understanding: Performers' interest in and knowledge of musical work(s), understanding of their own technical skill, and the context for a performance influence the selection of repertoire.
Essential Question: How do performers select repertoire?

Novice
MU:Pr4.1.H. Novice
Describe and demonstrate how a varied repertoire of music that includes melodies, repertoire pieces, and chordal accompaniments is selected, based on personal interest, music reading skills, and technical skill, as well as the context of the performances.

Intermediate
MU:Pr4.1.H. Intermediate
Describe and demonstrate how a varied repertoire of music that includes melodies, repertoire pieces, and chordal accompaniments is selected, based on personal interest, music reading skills, and technical skill (citing technical challenges that need to be addressed), as well as the context of the performances.

Proficient
MU:Pr4.1.H. I
a.Explain the criteria used when selecting a varied repertoire of music for individual or small group performances that include melodies, repertoire pieces, improvisations, and chordal accompaniments in a variety of patterns (such as arpeggio, country and gallop strumming, finger picking patterns).

Advanced
MU:Pr4.1.H. III
Develop and apply criteria for selecting a varied repertoire for a program of music for individual and small group performances that include melodies, repertoire pieces, stylistically appropriate accompaniments, and improvisations in a variety of contrasting styles.

Music Harmonizing Instruments/Performing
#MU:Pr4.2.H
Process Component: GMS-Analyze - Analyze the structure and context of varied musical works and their implications for performance
Anchor Standard: Select, analyze and interpret artistic work for presentation.
Enduring Understanding: Analyzing creators' context and how they manipulate elements of music provides insight into their intent and informs performance.
Essential Question: How does understanding the structure and context of musical works inform performance?

Novice
MU:Pr4.2.H.7
a. Explain and demonstrate the structure of contrasting pieces of music selected for performance and how elements of music are used.
b. When analyzing selected music, read and identify by name or function standard symbols for rhythm, pitch articulation, dynamics, tempo, and form.
c. Identify how cultural and historical context inform performances and result in different music interpretations.

Proficient
MU:Pr4.2.H.8

a. Compare the structure of contrasting pieces of music selected for performance, explaining how the elements of music are used in each.
b. When analyzing selected music, sight-read in treble or bass clef simple rhythmic, melodic, and/or harmonic notation.
c. Identity how cultural and historical context inform performances and result in different musical effects.

Music Harmonizing Instruments/Performing
#MU:Pr4.3.H
Process Component: MHI-Interpret - Develop personal interpretations that consider creators' intent.
Anchor Standard: Select, analyze and interpret work for presentation.
Enduring Understanding: Performers make interpretive decisions based on their understanding of context and expressive intent.
Essential Question: How do performers interpret musical works?

Novice
MU:Pr4.3.H. Novice
Identify prominent melodic and harmonic characteristics in a varied repertoire of music that includes melodies, repertoire pieces, and chordal accompaniments selected for performance, including at least some based on reading standard notation.

Intermediate
MU:Pr4.3.H. Intermediate
Identify prominent melodic, harmonic, and structural characteristics and context (social, cultural, or historical) in a varied repertoire of music that includes melodies, repertoire pieces, and chordal accompaniments selected for performance, including at least some based on reading standard notation.

Proficient
MU:Pr4.3.H. I
Identify and describe important theoretical and structural characteristics and context (social, cultural, or historical) in a varied repertoire of music that includes melodies, repertoire pieces, improvisations, and chordal accompaniments in a variety of patterns (such as arpeggio, country and gallop strumming, finger picking patterns).

Advanced
MU:Pr4.3.H. III
Identify and describe important theoretical and structural characteristics and context (social, cultural, and historical) in a varied repertoire of music selected for performance programs that includes melodies, repertoire pieces, stylistically appropriate accompaniments, and improvisations in a variety of contrasting styles.

Music Harmonizing Instruments/Performing
#MU:Pr5.1.H
Process Component: MHI-Rehearse, Evaluate and Refine - Evaluate and refine personal and ensemble performances, individually or in collaboration with others.
Anchor Standard: Develop and refine artistic techniques and work for presentation.
Enduring Understanding: To express their musical ideas, musicians analyze, evaluate, and refine their performance over time through openness to new ideas, persistence, and the application of appropriate criteria.

Essential Question: How do musicians improve the quality of their performance?

Novice
MU:Pr5.1.H. Novice
Apply teacher-provided criteria to critique individual performances of a varied repertoire of music that includes melodies, repertoire pieces, and chordal accompaniments selected for performance, and apply practice strategies to address performance challenges and refine the performances.

Intermediate
MU:Pr5.1.H. Intermediate
Apply teacher-provided criteria to critique individual performances of a varied repertoire of music that includes melodies, repertoire pieces, and chordal accompaniments selected for performance, and identify practice strategies to address performance challenges and refine the performances.

Proficient
MU:Pr5.1.H. I
Develop and apply criteria to critique individual and small group performances of a varied repertoire of music that includes melodies, repertoire pieces, improvisations, and chordal accompaniments in a variety of patterns (such as arpeggio, country and gallop strumming, finger picking patterns), and create rehearsal strategies to address performance challenges and refine the performances.

Advanced
MU:Pr5.1.H. III
Develop and apply criteria, including feedback from multiple sources, to critique varied programs of music repertoire (e.g., melodies, repertoire pieces, stylistically appropriate accompaniments, improvisations in a variety of contrasting styles) selected for individual and small group performance, and create rehearsal strategies to address performance challenges and refine the performances.

Music Harmonizing Instruments/Performing
#MU:Pr6.1.H
Process Component: MHI-Present - Perform expressively, with appropriate interpretation and technical accuracy, and in a manner appropriate to the audience and context.
Anchor Standard: Convey meaning through the presentation of artistic work.
Enduring Understanding: Musicians judge performance based on criteria that vary across time, place, and cultures. The context and how a work is presented influence the audience response.
Essential Question: When is a performance judged ready to present? How do context and the manner in which musical work is presented influence audience response?

Novice
MU:Pr6.1.H. Novice
Perform with expression and technical accuracy in individual performances of a varied repertoire of music that includes melodies, repertoire pieces, and chordal accompaniments, demonstrating understanding of the audience and the context.

Intermediate
MU:Pr6.1.H. Intermediate
a. Perform with expression and technical accuracy in individual performances of a varied repertoire of music that includes melodies, repertoire pieces, and chordal accompaniments,

demonstrating sensitivity to the audience and an understanding of the context (social, cultural, or historical).

Proficient
MU:Pr6.1.H. I
Perform with expression and technical accuracy, in individual and small group performances, a varied repertoire of music that includes melodies, repertoire pieces, improvisations, and chordal accompaniments in a variety of patterns (e.g., arpeggio, country and gallop strumming, finger picking), demonstrating sensitivity to the audience and an understanding of the context (social, cultural, or historical).

Advanced
MU:Pr6.1.H. III
Perform with expression and technical accuracy, in individual and small group performances, a varied repertoire for programs of music that includes melodies, repertoire pieces, stylistically appropriate accompaniments, and improvisations in a variety of contrasting styles, demonstrating sensitivity to the audience and an understanding of the context (social, cultural, and historical).

Music Harmonizing Instruments/Responding
#MU:Re7.1.H
Process Component: MHI-Select- Choose music appropriate for a specific purpose or context.
Anchor Standard: Perceive and analyze artistic work.
Enduring Understanding: Individuals' selection of musical works is influenced by their interests, experiences, understandings, and purposes.
Essential Question: How do individuals choose music to experience?

Novice
MU:Re7.1.H. Novice
Demonstrate and describe reasons for selecting music, based on characteristics found in the music and connections to interest, purpose, or personal experience.

Intermediate
MU:Re7.1.H. Intermediate
Explain reasons for selecting music citing characteristics found in the music and connections to interest, purpose, and context.

Proficient
MU:Re7.1.H. I
Apply criteria to select music for specified purposes, supporting choices by citing characteristics found in the music and connections to interest, purpose, and context.

Advanced
MU:Re7.1.H. III
Select, describe, and compare a variety of individual and small group musical programs from varied cultures, genres, and historical periods.

Music Harmonizing Instruments/Responding

#MU:Re7.2.H
Process Component: MHI-Analyze - Analyze how the structure and context of varied musical works inform the response.
Anchor Standard: Perceive and analyze artistic work.
Enduring Understanding: Response to music is informed by analyzing context (social, cultural, and historical) and how creators and performers manipulate the elements of music.
Essential Question: How does understanding the structure and context of music inform a response?

Novice
MU:Re7.2.H. Novice
Demonstrate and explain, citing evidence, the use of repetition, similarities and contrasts in musical selections and how these and knowledge of the context (social or cultural) inform the response.

Intermediate
MU:Re7.2.H. Intermediate
Describe how the way that the elements of music are manipulated and knowledge of the context (social and cultural) inform the response.

Proficient
MU:Re7.2.H. I
Compare passages in musical selections and explain how the elements of music and context (social, cultural, or historical) inform the response.
Advanced
MU:Re7.2.H. III
Demonstrate and justify how the structural characteristics function within a variety of musical selections, and distinguish how context (social, cultural, and historical) and creative decisions inform the response.

Music Harmonizing Instruments/Responding
#MU:Re8.1.H
Process Component: MHI-Interpret - Support interpretations of musical works that reflect creators'/performers' expressive intent.
Anchor Standard: Interpret intent and meaning in artistic work.
Enduring Understanding: Through their use of elements and structures of music, creators and performers provide clues to their expressive intent.
Essential Question: How do we discern the musical creators' and performers' expressive intent?

Novice
MU:Re8.1.H. Novice
Identify interpretations of the expressive intent and meaning of musical selections, referring to the elements of music, context (personal or social), and (when appropriate) the setting of the text.

Intermediate
MU:Re8.1.H. Intermediate
Identify and support interpretations of the expressive intent and meaning of musical selections, citing as evidence the treatment of the elements of music, context, and (when appropriate) the setting of the text.

Proficient

MU:Re8.1.H. I
Explain and support interpretations of the expressive intent and meaning of musical selections, citing as evidence the treatment of the elements of music, context (personal, social, and cultural), and (when appropriate) the setting of the text, and outside sources.

Advanced
MU:Re8.1.H. III
Establish and justify interpretations of the expressive intent and meaning of musical selections by comparing and synthesizing varied researched sources, including reference to examples from other art forms.

Music Harmonizing Instruments/Responding
#MU:Re9.1.H
Process Component: MHI-Evaluate - Support their personal evaluations of musical work(s) and performance(s) based on analysis, interpretation, and established criteria.
Anchor Standard: Apply criteria to evaluate artistic work.
Enduring Understanding: The personal evaluation of musical work(s) and performance(s) is informed by analysis, interpretation, and established criteria.
Essential Question: How do we judge the quality of musical work(s) and performance(s)?

Novice
MU:Re9.1.H. Novice
Identify and describe how interest, experiences, and contexts (personal or social) effect the evaluation of music.

Intermediate
MU:Re9.1.H. Intermediate
Explain the influence of experiences and contexts (personal, social, or cultural) on interest in and the evaluation of a varied repertoire of music.

Proficient
MU:Re9.1.H. I
Develop and apply teacher-provided and established criteria based on personal preference, analysis, and context (personal, social, and cultural) to evaluate individual and small group musical selections for listening.

Advanced
MU:Re9.1.H. III
Develop and justify evaluations of a variety of individual and small group musical selections for listening based on personally-developed and established criteria, personal decision making, and knowledge and understanding of context.

Music Harmonizing Instruments/Connecting
#MU:Cn10.0.H
Process Component: MHI-Connect #10- Synthesize and relate knowledge and personal experiences to make music.
Anchor Standard: Synthesize and relate knowledge and personal experiences to make art.

Enduring Understanding: Musicians connect their personal interests, experiences, ideas, and knowledge to creating, performing, and responding.
Essential Question: How do musicians make meaningful connections to creating, performing, and responding?

Novice
MU:Cn10.0.H. Novice
Demonstrate how interests, knowledge and skills relate to personal choices and intent when creating, performing, and responding to music.

Intermediate
MU:Cn10.0.H. Intermediate
Demonstrate how interests, knowledge and skills relate to personal choices and intent when creating, performing, and responding to music.

Proficient
MU:Cn10.0.H. I
Demonstrate how interests, knowledge and skills relate to personal choices and intent when creating, performing, and responding to music.

Advanced
MU:Cn10.0.H. III
Demonstrate how interests, knowledge and skills relate to personal choices and intent when creating, performing, and responding to music.

Music Harmonizing Instruments/Connecting
#MU:Cn11.0.H
Process Component: MHI-Connect #11- Relate musical ideas and works to varied contexts and daily life to deepen understanding.
Anchor Standard: Relate artistic ideas and works with societal, cultural and historical context to deepen understanding.
Enduring Understanding: Understanding connections to varied contexts and daily life enhances musicians' creating, performing, and responding.
Essential Question: How do the other arts, other disciplines, contexts and daily life inform creating, performing, and responding to music?

Novice
MU:Cn11.0.H. Novice
Demonstrate understanding of relationships between music and the other arts, other disciplines, varied contexts and daily life.

Intermediate
MU:Cn11.0.H. Intermediate
Demonstrate understanding of relationships between music and the other arts, other disciplines, varied contexts and daily life.

Proficient
MU:Cn11.0.H. I
Demonstrate understanding of relationships between music and the other arts, other disciplines, varied contexts and daily life.

Advanced
MU:Cn11.0.H. III
Demonstrate understanding of relationships between music and the other arts, other disciplines, varied contexts and daily life.

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Music: Theory and Composition

Music Theory Composition/Creating
#MU:Cr1.1.C
Process Component: MTC - Imagine - Generate musical ideas for various purposes and contexts.
Anchor Standard: Generate and conceptualize artistic ideas and work.
Enduring Understanding: The creative ideas, concepts, and feelings that influence musicians' work emerge from a variety of sources.
Essential Question: How do musicians generate creative ideas?

HS Proficient
MU:Cr1.1.C.HSI
Describe how sounds and short musical ideas can be used to represent personal experiences, moods, visual images, and/or storylines.

HS Accomplished
MU:Cr1.1.C.HSII
Describe and demonstrate how sounds and musical ideas can be used to represent sonic events, memories, visual images, concepts, texts, or storylines.

HS Advanced
MU:Cr1.1.C.HSIII
Describe and demonstrate multiple ways in which sounds and musical ideas can be used to represent extended sonic experiences or abstract ideas.

Music Theory Composition/Creating
#MU:Cr2.1.C
Process Component: MTC - Plan and Make - Select and develop musical ideas for defined purposes and contexts.
Anchor Standard: Organize and develop artistic ideas and work.
Enduring Understanding: Musicians' creative choices are influenced by their expertise, context, and expressive intent.
Essential Question: How do musicians make creative decisions?

HS Proficient
MU:Cr2.1.C.HSI
a. Assemble and organize sounds or short musical ideas to create initial expressions of selected experiences, moods, images, or storylines.
b. Identify and describe the development of sounds or short musical ideas in drafts of music within simple forms (e.g., one-part, cyclical, or binary).

HS Accomplished
MU:Cr2.1.C.HSII
a. Assemble and organize multiple sounds or musical ideas to create initial expressive statements of selected sonic events, memories, images, concepts, texts, or storylines.
b. Describe and explain the development of sounds and musical ideas in drafts of music within a variety of simple or moderately complex forms (such as binary, rondo, or ternary).

HS Advanced
MU:Cr2.1.C.HSIII
a. Assemble and organize multiple sounds or extended musical ideas to create initial expressive statements of selected extended sonic experiences or abstract ideas.
b. Analyze and demonstrate the development of sounds and extended musical ideas in drafts of music within a variety of moderately complex or complex forms.

Music Theory Composition/Creating
#MU:Cr3.1.C
Process Component: MTC - Evaluate and Refine - Evaluate and refine selected musical ideas to create musical work that meets appropriate criteria.
Anchor Standard: Refine and complete artistic work.
Enduring Understanding: Musicians evaluate and refine their work through openness to new ideas, persistence, and the application of appropriate criteria.
Essential Question: How do musicians improve the quality of their creative work?

HS Proficient
MU:Cr3.1.C.HSI
Identify, describe, and apply teacher-provided criteria to assess and refine the technical and expressive aspects of evolving drafts leading to final versions.

HS Accomplished
MU:Cr3.1.C.HSII
Identify, describe, and apply selected teacher-provided or personally-developed criteria to assess and refine the technical and expressive aspects of evolving drafts leading to final versions.

HS Advanced
MU:Cr3.1.C.HSIII
Research, identify, explain, and apply personally-developed criteria to assess and refine the technical and expressive aspects of evolving drafts leading to final versions.

Music Theory Composition/Creating
#MU:Cr3.2.C
Process Component: MTC - Present - Share creative musical work that conveys intent, demonstrates craftsmanship, and exhibits originality.
Anchor Standard: Refine and complete artistic work.
Enduring Understanding: Musicians' presentation of creative work is the culmination of a process of creation and communication.
Essential Question: When is creative work ready to share?

HS Proficient
MU:Cr3.2.C.HSI
Share music through the use of notation, performance, or technology, and demonstrate how the elements of music have been employed to realize expressive intent.

HS Accomplished
MU:Cr3.2.C.HSII
Share music through the use of notation, solo or group performance, or technology, and demonstrate and describe how the elements of music and compositional techniques have been employed to realize expressive intent.

HS Advanced
MU:Cr3.2.C.HSIII
Share music through the use of notation, solo or group performance, or technology, and demonstrate and explain how the elements of music, compositional techniques and processes have been employed to realize expressive intent.

Music Theory Composition/Performing
#MU:Pr4.1.C
Process Component: MTC - Select - Select varied musical works to present based on interest, knowledge, technical skill, and context.
Anchor Standard: Select, analyze and interpret artistic work for presentation.
Enduring Understanding: Performers' interest in and knowledge of musical work(s), understanding of their own technical skill, and the context for a performance influence the selection of repertoire.
Essential Question: How do performers select repertoire?

HS Proficient
MU:Pr4.1.C.HSI
Identify and select specific excerpts, passages, or sections in musical works that express a personal experience, mood, visual image, or storyline in simple forms (such as one-part, cyclical, binary).

HS Accomplished
MU:Pr4.1.C.HSII
Identify and select specific passages, sections, or movements in musical works that express personal experiences and interests, moods, visual images, concepts, texts, or storylines in simple forms (such as binary, ternary, rondo) or moderately complex forms.

Grade HS Advanced
MU:Pr4.1.C.HSIII
Identify and select specific sections, movements, or entire works that express personal experiences and interests, moods, visual images, concepts, texts, or storylines in moderately complex or complex forms.

Music Theory Composition/Performing
#MU:Pr4.2
Process Component: MTC - Analyze - Analyze the structure and context of varied musical works and their implications for performance.
Anchor Standard: Select, analyze and interpret artistic work for presentation.

Enduring Understanding: Analyzing creators' context and how they manipulate elements of music provides insight into their intent and informs performance.
Essential Question: How does understanding the structure and context of musical works inform performance?

HS Proficient
MU:Pr4.2.HSI
Analyze how the elements of music (including form) of selected works relate to style and mood, and explain the implications for rehearsal or performance.
HS Accomplished
MU:Pr4.2.HSII
Analyze how the elements of music (including form) of selected works relate to the style, function, and context, and explain the implications for rehearsal and performance.

HS Advanced
MU:Pr4.2.HSIII
Analyze how the elements of music (including form), and compositional techniques of selected works relate to the style, function, and context, and explain and support the analysis and its implications for rehearsal and performance.

Music Theory Composition/Performing
#MU:Pr5.1.C
Process Component: MTC - Rehearse, Evaluate and Refine - Evaluate and refine personal and ensemble performances, individually or in collaboration with others.
Anchor Standard: Develop and refine artistic techniques and work for presentation.
Enduring Understanding: To express their musical ideas, musicians analyze, evaluate, and refine their performance over time through openness to new ideas, persistence, and the application of appropriate criteria.
Essential Question: How do musicians improve the quality of their performance?

HS Proficient
MU:Pr5.1.C.HSI
a. Create rehearsal plans for works, identifying repetition and variation within the form.
b. Using established criteria and feedback, identify the way(s) in which performances convey the elements of music, style, and mood.
c. Identify and implement strategies for improving the technical and expressive aspects of multiple works.

HS Accomplished
MU:Pr5.1.C.HSII
a. Create rehearsal plans for works, identifying the form, repetition and variation within the form, and the style and historical or cultural context of the work.
b. Using established criteria and feedback, identify the ways in which performances convey the formal design, style, and historical/cultural context of the works.
c. Identify and implement strategies for improving the technical and expressive aspects of varied works.

HS Advanced
MU:Pr5.1.C.HSIII
a. Create rehearsal plans for works, identifying the form, repetition and variation within the form, compositional techniques, and the style and historical or cultural context of the work.
b. Using established criteria and feedback, identify the ways in which performances use compositional

techniques and convey the formal design, style, and historical/cultural context of the works.
c. Identify, compare, and implement strategies for improving the technical and expressive aspects of multiple contrasting works.

Music Theory Composition/Performing
#MU:Pr6.1.C
Process Component: MTC - Present - Perform expressively, with appropriate interpretation and technical accuracy, and in a manner appropriate to the audience and context.
Anchor Standard: Convey meaning through the presentation of artistic work.
Enduring Understanding: Musicians judge performance based on criteria that vary across time, place, and cultures. The context and how a work is presented influence the audience response.
Essential Question: When is a performance judged ready to present? How do context and the manner in which musical work is presented influence audience response?

HS Proficient
MU:Pr6.1.C.HSI
a. Share live or recorded performances of works (both personal and others'), and explain how the elements of music are used to convey intent.
b. Identify how compositions are appropriate for an audience or context, and how this will shape future compositions.

HS Accomplished
MU:Pr6.1.C.HSII
a. Share live or recorded performances of works (both personal and others'), and explain how the elements of music and compositional techniques are used to convey intent.
b. Explain how compositions are appropriate for both audience and context, and how this will shape future compositions.

HS Advanced
MU:Pr6.1.C.HSIII
a. Share live or recorded performances of works (both personal and others'), and explain and/or demonstrate understanding of how the expressive intent of the music is conveyed.
b. Explain how compositions are appropriate for a variety of audiences and contexts, and how this will shape future compositions.

Music Theory Composition/Responding
#MU:Re7.1.C
Process Component: MTC - Select - Choose music appropriate for a specific purpose or context.
Anchor Standard: Perceive and analyze artistic work.
Enduring Understanding: Individuals' selection of musical works is influenced by their interests, experiences, understandings, and purposes.
Essential Question: How do individuals choose music to experience?

HS Proficient
MU:Re7.1.C.HSI
Apply teacher-provided criteria to select music that expresses a personal experience, mood, visual image, or storyline in simple forms (such as one-part, cyclical, binary), and describe the choices as models for composition.

Grade HS Accomplished
MU:Re7.1.C.HSII
Apply teacher-provided or personally-developed criteria to select music that expresses personal experiences and interests, moods, visual images, concepts, texts, or storylines in simple or moderately complex forms, and describe and defend the choices as models for composition.

HS Advanced
MU:Re7.1.C.HSIII
Apply researched or personally-developed criteria to select music that expresses personal experiences and interests, visual images, concepts, texts, or storylines in moderately complex or complex forms, and describe and justify the choice as models for composition.

Music Theory Composition/Responding
#MU:Re8.1.C
Process Component: MTC - Interpret - Support interpretations of musical works that reflect creators'/performers' expressive intent.
Anchor Standard: Interpret intent and meaning in artistic work.
Enduring Understanding: Through their use of elements and structures of music, creators and performers provide clues to their expressive intent.
Essential Question: How do we discern musical creators' and performers' expressive intent?

HS Proficient
MU:Re8.1.C.HSI
Develop and explain interpretations of varied works, demonstrating an understanding of the composers' intent by citing technical and expressive aspects as well as the style/genre of each work.

HS Accomplished
MU:Re8.1.C.HSII
Develop and support interpretations of varied works, demonstrating an understanding of the composers' intent by citing the use of elements of music (including form), compositional techniques, and the style/genre and context of each work.

HS Advanced
MU:Re8.1.C.HSIII
Develop, justify and defend interpretations of varied works, demonstrating an understanding of the composers' intent by citing the use of elements of music (including form), compositional techniques, and the style/genre and context of each work.

Music Theory Composition/Responding
#MU:Re9.1.C
Process Component: MTC - Evaluate - Support evaluations of musical works and performances based on analysis, interpretation, and established criteria.
Anchor Standard: Evaluate - Support evaluations of musical works and performances based on analysis, interpretation, and established criteria.
Enduring Understanding: The personal evaluation of musical works and performances is informed by analysis, interpretation, and established criteria.
Essential Question: How do we judge the quality of musical work(s) and performance(s)?

HS Proficient
MU:Re9.1.C.HSI
a. Describe the effectiveness of the technical and expressive aspects of selected music and performances, demonstrating understanding of fundamentals of music theory.
b. Describe the way(s) in which critiquing others' work and receiving feedback from others can be applied in the personal creative process.

HS Accomplished
MU:Re9.1.C.HSII
a. Explain the effectiveness of the technical and expressive aspects of selected music and performances, demonstrating understanding of music theory as well as compositional techniques and procedures.
b. Describe ways in which critiquing others' work and receiving feedback from others have been specifically applied in the personal creative process.

HS Advanced
MU:Re9.1.C.HSIII
a. Evaluate the effectiveness of the technical and expressive aspects of selected music and performances, demonstrating understanding of theoretical concepts and complex compositional techniques and procedures.
b. Describe and evaluate ways in which critiquing others' work and receiving feedback from others have been specifically applied in the personal creative process.

Music Theory Composition/Connecting
#MU:Cn10.0.C
Process Component: MTC - Connect #10 - Synthesize and relate knowledge and personal experiences to make music.
Anchor Standard: Synthesize and relate knowledge and personal experiences to make art.
Enduring Understanding: Musicians connect their personal interests, experiences, ideas, and knowledge to creating, performing, and responding.
Essential Question: How do musicians make meaningful connections to creating, performing, and responding?

HS Proficient
MU:Cn10.0.C.HSI
Demonstrate how interests, knowledge, and skills relate to personal choices and intent when creating, performing, and responding to music.

Grade HS Accomplished
MU:Cn10.0.C.HSII
Demonstrate how interests, knowledge, and skills relate to personal choices and intent when creating, performing, and responding to music.

Grade HS Advanced
MU:Cn10.0.C.HSIII
Demonstrate how interests, knowledge and skills relate to personal choices and intent when creating, performing, and responding to music.

Music Theory Composition/Connecting
#MU:Cn11.0.C
Process Component: MTC - Connect #11- Relate musical ideas and works to varied contexts and daily life to deepen understanding.
Anchor Standard: Relate artistic ideas and works with societal, cultural and historical context to deepen understanding.
Enduring Understanding: Understanding connections to varied contexts and daily life enhances musicians' creating, performing, and responding.
Essential Question: How do the other arts, other disciplines, contexts and daily life inform creating, performing, and responding to music?

HS Proficient
MU:Cn11.0.C.HSI
Demonstrate understanding of relationships between music and the other arts, other disciplines, varied contexts, and daily life.

HS Accomplished
MU:Cn11.0.C.HSII
Demonstrate understanding of relationships between music and the other arts, other disciplines, varied contexts, and daily life.

HS Advanced
MU:Cn11.0.C.HSIII
Demonstrate understanding of relationships between music and the other arts, other disciplines, varied contexts, and daily life.

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Music: Traditional and Emerging Ensembles

Music Traditional And Emerging Ensembles/Creating
#MU:Cr1.1.E
Process Component: MTE - Imagine - Generate musical ideas for various purposes and contexts.
Anchor Standard: Generate and conceptualize artistic ideas and work.
Enduring Understanding: The creative ideas, concepts, and feelings that influence musicians' work emerge from a variety of sources.
Essential Question: How do musicians generate creative ideas?

Novice
MU:Cr1.1.E.HS. Novice
Compose and improvise melodic and rhythmic ideas or motives that reflect characteristic(s) of music or text(s) studied in rehearsal.

HS Intermediate
MU:Cr1.1.E.HS. Intermediate
Compose and improvise ideas for melodies and rhythmic passages based on characteristic(s) of music or text(s) studied in rehearsal.

HS Proficient
MU:Cr1.1.E.HSI
Compose and improvise ideas for melodies, rhythmic passages, and arrangements for specific purposes that reflect characteristic(s) of music from a variety of historical periods studied in rehearsal.

HS Accomplished
MU:Cr1.1.E.HSII
Compose and improvise ideas for arrangements, sections, and short compositions for specific purposes that reflect characteristic(s) of music from a variety of cultures studied in rehearsal.

HS Advanced
MU:Cr1.1.E.HSIII
Compose and improvise musical ideas for a variety of purposes and contexts.

Music Traditional And Emerging Ensembles/Creating
#MU:Cr2.1.E
Process Component: MTE - Plan and Make - Select and develop musical ideas for defined purposes and contexts.
Anchor Standard: Organize and develop artistic ideas and work.
Enduring Understanding: Musicians' creative choices are influenced by their expertise, context, and expressive intent.
Essential Question: How do musicians make creative decisions?

HS Novice
MU:Cr2.1.E.HS. Novice
a. Select and develop draft melodic and rhythmic ideas or motives that demonstrate understanding of characteristic(s) of music or text(s) studied in rehearsal.
b. Preserve draft compositions and improvisations through standard notation and audio recording.

HS Intermediate
MU:Cr2.1.E.HS. Intermediate
a. Select and develop draft melodies and rhythmic passages that demonstrate understanding of characteristic(s) of music or text(s) studied in rehearsal.
b. Preserve draft compositions and improvisations through standard notation and audio recording.

HS Proficient
MU:Cr2.1.E.HSI
a. Select and develop draft melodies, rhythmic passages, and arrangements for specific purposes that demonstrate understanding of characteristic(s) of music from a variety of historical periods studied in rehearsal.
b. Preserve draft compositions and improvisations through standard notation and audio recording.

HS Accomplished
MU:Cr2.1.E.HSII
a. Select and develop arrangements, sections, and short compositions for specific purposes that demonstrate understanding of characteristic(s) of music from a variety of cultures studied in rehearsal.
b. Preserve draft compositions and improvisations through standard notation, audio, or video recording.

HS Advanced
MU:Cr2.1.E.HSIII
a. Select and develop composed and improvised ideas into draft musical works organized for a variety of purposes and contexts.
b. Preserve draft musical works through standard notation, audio, or video recording.

Music Traditional And Emerging Ensembles/Creating
#MU:Cr3.1.E
Process Component: MTE – Evaluate and Refine - Evaluate and refine selected musical ideas to create musical work that meets appropriate criteria.
Anchor Standard: Refine and complete artistic work.
Enduring Understanding: Musicians evaluate and refine their work through openness to new ideas, persistence, and the application of appropriate criteria.
Essential Question: How do musicians improve the quality of their creative work?

HS Novice
MU:Cr3.1.E.HS. Novice
Evaluate and refine draft compositions and improvisations based on knowledge, skill, and teacher-provided criteria.

HS Intermediate
MU:Cr3.1.E.HS. Intermediate

Evaluate and refine draft compositions and improvisations based on knowledge, skill, and collaboratively-developed criteria.

HS Proficient
MU:Cr3.1.E.HSI
Evaluate and refine draft melodies, rhythmic passages, arrangements, and improvisations based on established criteria, including the extent to which they address identified purposes.

HS Accomplished
MU:Cr3.1.E.HSII
a. Evaluate and refine draft arrangements, sections, short compositions, and improvisations based on personally-developed criteria, including the extent to which they address identified purposes.

HS Advanced
MU:Cr3.1.E.HSIII
Evaluate and refine varied draft musical works based on appropriate criteria, including the extent to which they address identified purposes and contexts.

Music Traditional And Emerging Ensembles/Creating
#MU:Cr3.2.E
Process Component: MTE – Present - Share creative musical work that conveys intent, demonstrates craftsmanship, and exhibits originality.
Anchor Standard: Refine and complete artistic work.
Enduring Understanding: Musicians' presentation of creative work is the culmination of a process of creation and communication.
Essential Question: When is creative work ready to share?

HS Novice
MU:Cr3.2.E.HS. Novice
Share personally-developed melodic and rhythmic ideas or motives – individually or as an ensemble – that demonstrate understanding of characteristics of music or texts studied in rehearsal.

HS Intermediate
MU:Cr3.2.E.HS. Intermediate
Share personally-developed melodies and rhythmic passages – individually or as an ensemble – that demonstrate understanding of characteristics of music or texts studied in rehearsal.

HS Proficient
MU:Cr3.2.E.HSI
Share personally-developed melodies, rhythmic passages, and arrangements – individually or as an ensemble – that address identified purposes.

HS Accomplished
MU:Cr3.2.E.HSII
Share personally-developed arrangements, sections, and short compositions – individually or as an ensemble – that address identified purposes.

HS Advanced
MU:Cr3.2.E.HSIII

Share varied, personally-developed musical works – individually or as an ensemble – that address identified purposes and contexts.

Music Traditional And Emerging Ensembles/Performing
#MU:Pr4.1.E
Process Component: MTE – Select - Select varied musical works to present based on interest, knowledge, technical skill, and context.
Anchor Standard: Select, analyze and interpret artistic work for presentation.
Enduring Understanding: Performers' interest in and knowledge of musical works, understanding of their own technical skill, and the context for a performance influence the selection of repertoire.
Essential Question: How do performers select repertoire?

HS Novice
MU:Pr4.1.E.HS. Novice
Select varied repertoire to study based on interest, music reading skills (where appropriate), an understanding of the structure of the music, context, and the technical skill of the individual or ensemble.

HS Intermediate
MU:Pr4.1.E.HS. Intermediate
Select a varied repertoire to study based on music reading skills (where appropriate), an understanding of formal design in the music, context, and the technical skill of the individual and ensemble.

HS Proficient
MU:Pr4.1.E.HSI
Explain the criteria used to select a varied repertoire to study based on an understanding of theoretical and structural characteristics of the music, the technical skill of the individual or ensemble, and the purpose or context of the performance.

HS Accomplished
MU:Pr4.1.E.HSII
Develop and apply criteria to select a varied repertoire to study and perform based on an understanding of theoretical and structural characteristics and expressive challenges in the music, the technical skill of the individual or ensemble, and the purpose and context of the performance.

HS Advanced
MU:Pr4.1.E.HSIII
Develop and apply criteria to select varied programs to study and perform based on an understanding of theoretical and structural characteristics and expressive challenges in the music, the technical skill of the individual or ensemble, and the purpose and context of the performance.

Music Traditional And Emerging Ensembles/Performing
#MU:Pr4.2.E
Process Component: MTE – Analyze - Analyze the structure and context of varied musical works and their implications for performance.
Anchor Standard: Select, analyze and interpret artistic work for presentation.
Enduring Understanding: Analyzing creators' context and how they manipulate elements of music provides insight into their intent and informs performance.

Essential Question: How does understanding the structure and context of musical works inform performance?

HS Novice
MU:Pr4.2.E.HS. Novice
Demonstrate, using music reading skills where appropriate, how knowledge of formal aspects in musical works inform prepared or improvised performances.

HS Intermediate
MU:Pr4.2.E.HS. Intermediate
Demonstrate, using music reading skills where appropriate, how the setting and formal characteristics of musical works contribute to understanding the context of the music in prepared or improvised performances.

HS Proficient
MU:Pr4.2.E.HSI
Demonstrate, using music reading skills where appropriate, how compositional devices employed and theoretical and structural aspects of musical works impact and inform prepared or improvised performances.

HS Accomplished
MU:Pr4.2.E.HSII
Document and demonstrate, using music reading skills where appropriate, how compositional devices employed and theoretical and structural aspects of musical works may impact and inform prepared and improvised performances.

HS Advanced
MU:Pr4.2.E.HSIII
Examine, evaluate, and critique, using music reading skills where appropriate, how the structure and context impact and inform prepared and improvised performances.

Music Traditional And Emerging Ensembles/Performing
#MU:Pr4.3.E
Process Component: MTE – Interpret - Develop personal interpretations that consider creators' intent.
Anchor Standard: Select, analyze and interpret artistic work for presentation.
Enduring Understanding: Performers make interpretive decisions based on their understanding of context and expressive intent.
Essential Question: How do performers interpret musical works?

HS Novice
MU:Pr4.3.E.HS. Novice
Identify expressive qualities in a varied repertoire of music that can be demonstrated through prepared and improvised performances.

HS Intermediate
MU:Pr4.3.E.HS Intermediate
Demonstrate understanding and application of expressive qualities in a varied repertoire of music through prepared and improvised performances.

HS Proficient

MU:Pr4.3.E.HSI
Demonstrate an understanding of context in a varied repertoire of music through prepared and improvised performances.

HS Accomplished
MU:Pr4.3.E.HSII
Demonstrate how understanding the style, genre, and context of a varied repertoire of music influences prepared and improvised performances as well as performers' technical skill to connect with the audience.

HS Advanced
MU:Pr4.3.E.HSIII
Demonstrate how understanding the style, genre, and context of a varied repertoire of music informs prepared and improvised performances as well as performers' technical skill to connect with the audience.

Music Traditional And Emerging Ensembles/Performing
#MU:Pr5.1.E
Process Component: MTE – Evaluate and Refine - Evaluate and refine selected musical ideas to create musical work that meets appropriate criteria.
Anchor Standard: Develop and refine artistic techniques and work for presentation.
Enduring Understanding: To express their musical ideas, musicians analyze, evaluate, and refine their performance over time through openness to new ideas, persistence, and the application of appropriate criteria.
Essential Question: How do musicians improve the quality of their performance?

HS Novice
MU:Pr5.1.E.HS. Novice
Evaluate and refine draft compositions and improvisations based on knowledge, skill, and teacher-provided criteria.

HS Intermediate
MU:Pr5.1.E.HS. Intermediate
Evaluate and refine draft compositions and improvisations based on knowledge, skill, and collaboratively-developed criteria.

HS proficient
MU:Pr5.1.E.HSI
a. Evaluate and refine draft melodies, rhythmic passages, arrangements, and improvisations based on established criteria, including the extent to which they address identified purposes.

HS Accomplished
MU:Pr5.1.E.HSII
Evaluate and refine draft arrangements, sections, short compositions, and improvisations based on personally-developed criteria, including the extent to which they address identified purposes.

HS Advanced
MU:Pr5.1.E.HSIII
Evaluate and refine varied draft musical works based on appropriate criteria, including the extent to which they address identified purposes and contexts.

Music Traditional And Emerging Ensembles/Performing
#MU:Pr6.1.E
Process Component: MTE – Present - Perform expressively, with appropriate interpretation and technical accuracy, and in a manner appropriate to the audience and context.
Anchor Standard: Convey meaning through the presentation of artistic work.
Enduring Understanding: Musicians judge performance based on criteria that vary across time, place, and cultures. The context and how a work is presented influence the audience response.
Essential Question: When is a performance judged ready to present? How do context and the manner in which the musical work is presented influence audience response?

HS Novice
MU:Pr6.1.E.HS. Novice
a. Demonstrate attention to technical accuracy and expressive qualities in prepared and improvised performances of a varied repertoire of music.
b. Demonstrate an awareness of the context of the music through prepared and improvised performances.

HS Intermediate
MU:Pr6.1.E.HS. Intermediate
a. Demonstrate attention to technical accuracy and expressive qualities in prepared and improvised performances of a varied repertoire of music representing diverse cultures and styles.
b. Demonstrate an understanding of the context of the music through prepared and improvised performances.

HS Proficient
MU:Pr6.1.E.HSI
a. Demonstrate attention to technical accuracy and expressive qualities in prepared and improvised performances of a varied repertoire of music representing diverse cultures, styles, and genres.
b. Demonstrate an understanding of expressive intent by connecting with an audience through prepared and improvised performances.

HS Accomplished
MU:Pr6.1.E.HSII
a. Demonstrate mastery of the technical demands and an understanding of expressive qualities of the music in prepared and improvised performances of a varied repertoire representing diverse cultures, styles, genres, and historical periods.
b. Demonstrate an understanding of intent as a means for connecting with an audience through prepared and improvised performances.

HS Advanced
MU:Pr6.1.E.HSIII
a. Demonstrate an understanding and mastery of the technical demands and expressive qualities of the music through prepared and improvised performances of a varied repertoire representing diverse cultures, styles, genres, and historical periods in multiple types of ensembles.
b. Demonstrate an ability to connect with audience members before and during the process of engaging with and responding to them through prepared and improvised performances.

Music Traditional And Emerging Ensembles/Responding
#MU:Re7.1.E
Process Component: MTE – Select - Choose music appropriate for a specific purpose or context.
Anchor Standard: Perceive and analyze artistic work.
Enduring Understanding: Individuals' selection of musical works is influenced by their interests, experiences, understandings, and purposes.
Essential Question: How do individuals choose music to experience?

HS Novice
MU:Re7.1.E.HS. Novice
Identify reasons for selecting music based on characteristics found in the music, connection to interest, and purpose or context.

HS Intermediate
MU:Re7.1.E.HS. Intermediate
Explain reasons for selecting music citing characteristics found in the music and connections to interest, purpose, and context.

HS Proficient
MU:Re7.1.E.HSI
Apply criteria to select music for specified purposes, supporting choices by citing characteristics found in the music and connections to interest, purpose, and context.

HS Accomplished
MU:Re7.1.E.HSII
Apply criteria to select music for a variety of purposes, justifying choices citing knowledge of the music and the specified purpose and context.

HS Advanced
MU:Re7.1.E.HSIII
Use research and personally-developed criteria to justify choices made when selecting music, citing knowledge of the music, and individual and ensemble purpose and context.

Music Traditional And Emerging Ensembles/Responding
#MU:Re7.2.E
Process Component: MTE – Analyze - Analyze how the structure and context of varied musical works inform the response.
Anchor Standard: Perceive and analyze artistic work.
Enduring Understanding: Response to music is informed by analyzing context (social cultural, and historical) and how creators and performers manipulate the elements of music.
Essential Question: How does understanding the structure and context of the music influence a response?

HS Novice
MU:Re7.2.E.HS. Novice
Identify how knowledge of context and the use of repetition, similarities, and contrasts inform the response to music.

HS Intermediate
MU:Re7.2.E.HS. Intermediate

Describe how understanding context and the way the elements of music are manipulated inform the response to music.

HS Proficient
MU:Re7.2.E.HSI
Explain how the analysis of passages and understanding the way the elements of music are manipulated inform the response to music.

HS Accomplished
MU:Re7.2.E.HSII
Explain how the analysis of structures and contexts inform the response to music.

HS Advanced
MU:Re7.2.E.HSIII
Demonstrate and justify how the analysis of structures, contexts, and performance decisions inform the response to music.

Music Traditional And Emerging Ensembles/Responding
#MU:Re8.1.E
Process Component: MTE – Interpret - Support an interpretation of musical works that reflect creators'/performers' expressive intent.
Anchor Standard: Interpret intent and meaning in artistic work.
Enduring Understanding: Through their use of elements and structures of music, creators and performers provide clues to their expressive intent.
Essential Question: How do we discern the musical creators' and performers' expressive intent?

HS Novice
MU:Re8.1.E.HS. Novice
Identify interpretations of the expressive intent and meaning of musical works, referring to the elements of music, contexts, and (when appropriate) the setting of the text.

HS Intermediate
MU:Re8.1.E.HS. Intermediate
Identify and support interpretations of the expressive intent and meaning of musical works, citing as evidence the treatment of the elements of music, contexts, and (when appropriate) the setting of the text.

HS Proficient
MU:Re8.1.E.HSI
Explain and support interpretations of the expressive intent and meaning of musical works, citing as evidence the treatment of the elements of music, contexts, (when appropriate) the setting of the text, and personal research.

HS Accomplished
MU:Re8.1.E.HSII
Support interpretations of the expressive intent and meaning of musical works citing as evidence the treatment of the elements of music, contexts, (when appropriate) the setting of the text, and varied researched sources.
HS Advanced

MU:Re8.1.E.HSIII
Justify interpretations of the expressive intent and meaning of musical works by comparing and synthesizing varied researched sources, including reference to other art forms.

Music Traditional And Emerging Ensembles/Responding
#MU:Re9.1.E
Process Component: MTE – Evaluate - Support personal evaluation of musical works and performance(s) based on analysis, interpretation, and established criteria.
Anchor Standard: Apply criteria to evaluate artistic work.
Enduring Understanding: The personal evaluation of musical work(s) and performance(s) is informed by analysis, interpretation, and established criteria.
Essential Question: How do we judge the quality of musical work(s) and performance(s)?

HS Novice
MU:Re9.1.E.HS. Novice
Identify and describe the effect of interest, experience, analysis, and context on the evaluation of music.

HS Intermediate
MU:Re9.1.E.HS. Intermediate
Explain the influence of experiences, analysis, and context on interest in and evaluation of music.

HS Proficient
MU:Re9.1.E.HSI
Evaluate works and performances based on personally- or collaboratively-developed criteria, including analysis of the structure and context.

HS Accomplished
MU:Re9.1.E.HSII
Evaluate works and performances based on research as well as personally- and collaboratively-developed criteria, including analysis and interpretation of the structure and context.

HS Advanced
MU:Re9.1.E.HSIII
Develop and justify evaluations of music, programs of music, and performances based on criteria, personal decision-making, research, and understanding of contexts.

Music Traditional And Emerging Ensembles/Connecting
#MU:Cn10.0.E
Process Component: MTC - Connect #10 - Synthesize and relate knowledge and personal experiences to make music.
Anchor Standard: Synthesize and relate knowledge and personal experiences to make art.
Enduring Understanding: Musicians connect their personal interests, experiences, ideas, and knowledge to creating, performing, and responding.
Essential Question: How do musicians make meaningful connections to creating, performing, and responding?

HS Proficient
MU:Cn10.0.E.HSI

Demonstrate how interests, knowledge, and skills relate to personal choices and intent when creating, performing, and responding to music.

HS Accomplished
MU:Cn10.0.E.HSII
Demonstrate how interests, knowledge, and skills relate to personal choices and intent when creating, performing, and responding to music.

HS Advanced
MU:Cn10.0.E.HSIII
Demonstrate how interests, knowledge and skills relate to personal choices and intent when creating, performing, and responding to music.

Music Traditional And Emerging Ensembles/Connecting
#MU:Cn11.0.E
Process Component: MTE – Connect #11 - Relate musical ideas and works to varied contexts and daily life to deepen understanding.
Anchor Standard: Relate artistic ideas and works with societal, cultural and historical context to deepen understanding.
Enduring Understanding: Understanding connections to varied contexts and daily life enhances musicians' creating, performing, and responding.
Essential Question: How do the other arts, other disciplines, contexts and daily life inform creating, performing, and responding to music?

HS Novice
MU:Cn11.0.E.HS. Novice
Demonstrate understanding of relationships between music and the other arts, other disciplines, varied contexts, and daily life.

HS Intermediate
MU:Cn11.0.E.HS. Intermediate
Demonstrate understanding of relationships between music and the other arts, other disciplines, varied contexts, and daily life.

HS Proficient
MU:Cn11.0.E.HSI
Demonstrate understanding of relationships between music and the other arts, other disciplines, varied contexts, and daily life.

HS Accomplished
MU:Cn11.0.E.HSII
Demonstrate understanding of relationships between music and the other arts, other disciplines, varied contexts, and daily life.

HS Advanced
MU:Cn11.0.E.HSIII
Demonstrate understanding of relationships between music and the other arts, other disciplines, varied contexts, and daily life.

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Music: Technology

Music Technology/Creating
#MU:Cr1.1.T
Process Component: MTS-Imagine - Generate musical ideas for various purposes and contexts.
Anchor Standard: Generate and conceptualize artistic ideas and works.
Enduring Understanding: The creative ideas, concepts, and feelings that influence musicians' work emerge from a variety of sources.
Essential Question: How do musicians generate creative ideas?

HS Proficient
MU:Cr1.1.T.HSI
Generate melodic, rhythmic, and harmonic ideas for compositions or improvisations using digital tools.

HS Accomplished
MU:Cr1.1.T.HSII
Generate melodic, rhythmic, and harmonic ideas for compositions and improvisations using digital tools and resources.

HS Advanced
MU:Cr1.1.T.HSIII
Generate melodic, rhythmic, and harmonic ideas for compositions and improvisations that incorporate digital tools, resources, and systems.

Music Technology/Creating
#MU:Cr2.1.T
Process Component: MTS-Plan and Make - Select and develop musical ideas for defined purposes and contexts.
Anchor Standard: Organize and develop artistic ideas and work.
Enduring Understanding: Musicians' creative choices are influenced by their expertise, context, and expressive intent.
Essential Question: How do musicians make creative decisions?

HS Proficient
MU:Cr2.1.T.HSI
Select melodic, rhythmic, and harmonic ideas to develop into a larger work using digital tools and resources.

HS Accomplished
MU:Cr2.1.T.HSII
Select melodic, rhythmic, and harmonic ideas to develop into a larger work that exhibits unity and variety using digital and analog tools.

HS Advanced
MU:Cr2.1.T.HSIII

Select, develop, and organize multiple melodic, rhythmic and harmonic ideas to develop into a larger work that exhibits unity, variety, complexity, and coherence using digital and analog tools, resources, and systems.

Music Technology/Creating
#MU:Cr3.1.T
Process Component: MTS-Evaluate and Refine - Evaluate and refine selected musical ideas to create musical work that meets appropriate criteria.
Anchor Standard: Refine and complete artistic work.
Enduring Understanding: Musicians evaluate and refine their work through openness to new ideas, persistence, and the application of appropriate criteria.
Essential Question: How do musicians improve the quality of their creative work?

HS Proficient
MU:Cr3.1.T.HSI
Drawing on feedback from teachers and peers, develop and implement strategies to improve and refine the technical and expressive aspects of draft compositions and improvisations.

HS Accomplished
MU:Cr3.1.T.HSII
Develop and implement varied strategies to improve and refine the technical and expressive aspects of draft compositions and improvisations.

HS Advanced
MU:Cr3.1.T.HSIII
Develop and implement varied strategies and apply appropriate criteria to improve and refine the technical and expressive aspects of draft compositions and improvisations.

Music Technology/Creating
#MU:Cr3.2.T
Process Component: MTS-Present - Share creative musical work that conveys intent, demonstrates craftsmanship, and exhibits originality.
Anchor Standard: Refine and complete artistic work.
Enduring Understanding: Musicians' presentation of creative work is the culmination of a process of creation and communication.
Essential Question: When is creative work ready to share?

HS Proficient
MU:Cr3.2.T.HSI
Share compositions or improvisations that demonstrate a proficient level of musical and technological craftsmanship as well as the use of digital tools and resources in developing and organizing musical ideas.

HS Accomplished
MU:Cr3.2.T.HSII
Share compositions and improvisations that demonstrate an accomplished level of musical and technological craftsmanship as well as the use of digital and analog tools and resources in developing and organizing musical ideas.

HS Advanced
MU:Cr3.2.T.HSIII
Share a portfolio of musical creations representing varied styles and genres that demonstrates an advanced level of musical and technological craftsmanship as well as the use of digital and analog tools, resources and systems in developing and organizing musical ideas.

Music Technology/Performing
#MU:Pr4.1.T
Process Component: MTS-Select - Select varied musical works to present based on interest, knowledge, technical skill, and context.
Anchor Standard: Select, analyze and interpret artistic work for presentation.
Enduring Understanding: Performers' interest in and knowledge of musical works, understanding of their own abilities, and the context for a performance influence the selection of repertoire.
Essential Question: How do performers select repertoire?

HS Proficient
MU:Pr4.1.T.HSI
Develop and explain the criteria used for selecting a varied repertoire of music based on interest, music reading skills, and an understanding of the performer's technical and technological skill.

HS Accomplished
MU:Pr4.1.T.HSII
Develop and apply criteria to select a varied repertoire to study and perform based on interest; an understanding of theoretical and structural characteristics of the music; and the performer's technical skill using digital tools and resources.

HS Advanced
MU:Pr4.1.T.HSIII
Develop and apply criteria to select varied programs to study and perform based on interest, an understanding of the theoretical and structural characteristics, as well as expressive challenges in the music, and the performer's technical skill using digital tools, resources, and systems.

Music Technology/Performing
#MU:Pr4.2.T
Process Component: MTS-Analyze - Analyze the structure and context of varied musical works and their implications for performance.
Anchor Standard: Select, analyze and interpret artistic work for presentation.
Enduring Understanding: Analyzing creators' context and how they manipulate elements of music provides insight into their intent and informs performance.
Essential Question: How does understanding the structure and context of musical works inform performance?

HS Proficient
MU:Pr4.2.T.HSI
Describe how context, structural aspects of the music, and digital media/tools inform prepared and improvised performances.

HS Accomplished

MU:Pr4.2.T.HSII
Describe and demonstrate how context, theoretical and structural aspects of the music and digital media/tools inform and influence prepared and improvised performances.
HS Advanced
MU:Pr4.2.T.HSIII
Examine, evaluate and critique how context, theoretical and structural aspects of the music and digital media/tools inform and influence prepared and improvised performances.

Music Technology/Performing
#MU:Pr4.3.T
Process Component: MTS-Interpret - Develop personal interpretations that consider creators' intent.
Anchor Standard: Select, analyze and interpret artistic work for presentation.
Enduring Understanding: Performers make interpretive decisions based on their understanding of context and intent.
Essential Question: How do performers interpret musical works?

HS Proficient
MU:Pr4.3.T.HSI
Demonstrate how understanding the context, expressive challenges, and use of digital tools in a varied repertoire of music influence prepared or improvised performances.

HS Accomplished
MU:Pr4.3.T.HSII
Demonstrate how understanding the style, genre, context, and use of digital tools and resources in a varied repertoire of music influences prepared or improvised performances and performers' ability to connect with audiences.

HS Advanced
MU:Pr4.3.T.HSIII
Demonstrate how understanding the style, genre, context, and integration of digital technologies in a varied repertoire of music informs and influences prepared and improvised performances and their ability to connect with audiences.

Music Technology/Performing
#MU:Pr5.1.T
Process Component: MTS-Evaluate and Refine - Evaluate and refine personal and ensemble performances, individually or in collaboration with others.
Anchor Standard: Develop and refine artistic techniques and work for presentation.
Enduring Understanding: Musicians' creative choices are influenced by their context, expressive intent, and established criteria.
Essential Question: How do musicians make creative decisions?

HS Proficient
MU:Pr5.1.T.HSI
Identify and implement rehearsal strategies to improve the technical and expressive aspects of prepared and improvised performances in a varied repertoire of music.

HS Accomplished

MU:Pr5.1.T.HSII
Develop and implement rehearsal strategies to improve and refine the technical and expressive aspects of prepared and improvised performances in a varied repertoire of music.

HS Advanced
MU:Pr5.1.T.HSIII
Apply appropriate criteria as well as feedback from multiple sources and develop and implement varied strategies to improve and refine the technical and expressive aspects of prepared and improvised performances in varied programs of music.

Music Technology/Performing
#MU:Pr6.1.T
Process Component: MTS-Present - Perform expressively, with appropriate interpretation and technical accuracy, and in a manner appropriate to the audience and context.
Anchor Standard: Convey meaning through the presentation of artistic work.
Enduring Understanding: Musicians judge performance based on criteria that vary across time, place, and cultures. The context and how a work is presented influence the audience response.
Essential Question: When is a performance judged ready to present? How do context and the manner in which musical work is presented influence audience response?

HS Proficient
MU:Pr6.1.T.HSI
a. Using digital tools, demonstrate attention to technical accuracy and expressive qualities in prepared and improvised performances of a varied repertoire of music.
b. Demonstrate an understanding of the context of music through prepared and improvised performances.

HS Accomplished
MU:Pr6.1.T.HSII
a. Using digital tools and resources, demonstrate technical accuracy and expressive qualities in prepared and improvised performances of a varied repertoire of music representing diverse cultures, styles, and genres.
b. Demonstrate an understanding of the expressive intent when connecting with an audience through prepared and improvised performances.

Grade HS Advanced
MU:Pr6.1.T.HSIII
a. Integrating digital and analog tools and resources, demonstrate an understanding and attention to technical accuracy and expressive qualities of the music in prepared and improvised performances of a varied repertoire of music representing diverse cultures, styles, genres, and historical periods.
b. Demonstrate an ability to connect with audience members before, and engaging with and responding to them during prepared and improvised performances.

Music Technology/Responding
#MU:Re7.2.T
Process Component: MTS – Analyze - Analyze how the structure and context of varied musical works inform the response.
Anchor Standard: Perceive and analyze artistic work.

Enduring Understanding: Response to music is informed by analyzing context (social, cultural, and historical) and how creators and performers manipulate the elements of music.
Essential Question: How does understanding the structure and context of music inform a response?

HS Proficient
MU:Re7.2.T.HSI
Explain how knowledge of the structure (repetition, similarities, contrasts), technological aspects, and purpose of the music informs the response.

HS Accomplished
MU:Re7.2.T.HSII
Explain how an analysis of the structure, context, and technological aspects of the music informs the response.

HS Advanced
MU:Re7.2.T.HSIII
Demonstrate and justify how an analysis of the structural characteristics, context, and technological and creative decisions, informs interest in and response to the music.

Music Technology/Responding
#MU:Re7.I.T
Process Component: MTS – Select - Choose music appropriate for a specific purpose or context.
Anchor Standard: Perceive and analyze artistic work.
Enduring Understanding: Individuals' selection of musical works is influenced by their interests, experiences, understandings, and purposes.
Essential Question: How do individuals choose music to experience?

HS Proficient
MU:Re7.I.T.HSI
Cite reasons for choosing music based on the use of the elements of music, digital and electronic aspects, and connections to interest or purpose.

HS Accomplished
MU:Re7.I.T.HSII
Select and critique contrasting musical works, defending opinions based on manipulations of the elements of music, digital and electronic aspects, and the purpose and context of the works.

HS Advanced
MU:Re7.I.T.HSIII
Select, describe and compare a variety of musical selections based on characteristics and knowledge of the music, understanding of digital and electronic aspects, and the purpose and context of the works.

Music Technology/Responding
#MU:Re8.1.T
Process Component: MTS – Interpret - Support interpretations of musical works that reflect creators'/performers' expressive intent.
Anchor Standard: Interpret intent and meaning in artistic work.

Enduring Understanding: Through their use of elements and structures of music, creators and performers provide clues to their expressive intent.
Essential Question: How do we discern musical creators' and performers' expressive intent?

HS Proficient
MU:Re8.1.T.HSI
Explain and support an interpretation of the expressive intent of musical selections based on treatment of the elements of music, digital and electronic features, and purpose.

HS Accomplished
MU:Re8.1.T.HSII
Connect the influence of the treatment of the elements of music, digital and electronic features, context, purpose, and other art forms to the expressive intent of musical works.

HS Advanced
MU:Re8.1.T.HSIII
Examine, cite research and multiple sources to connect the influence of the treatment of the elements of music, digital and electronic features, context, purpose, and other art forms to the expressive intent of musical works.

Music Technology/Responding
#MU:Re9.1.T
Process Component: MTS – Evaluate - Support evaluations of musical works and performances based on analysis, interpretation, and established criteria.
Anchor Standard: Apply criteria to evaluate artistic work.
Enduring Understanding: The personal evaluation of musical works and performances is informed by analysis, interpretation, and established criteria.
Essential Question: How do we judge the quality of musical work(s) and performance(s)?

HS Proficient
MU:Re9.1.T.HSI
Evaluate music using criteria based on analysis, interpretation, digital and electronic features, and personal interests.

HS Accomplished
MU:Re9.1.T.HSII
Apply criteria to evaluate music based on analysis, interpretation, artistic intent, digital, electronic, and analog features, and musical qualities.

HS Advanced
MU:Re9.1.T.HSIII
Develop and justify the evaluation of a variety of music based on established and personally-developed criteria, digital, electronic and analog features, and understanding of purpose and context.

Music Technology/Connecting
#MU:Cn10.0.T

Process Component: MTS – Connect #10 - Synthesize and relate knowledge and personal experiences to make music.
Anchor Standard: Synthesize and relate knowledge and personal experiences to make art.
Enduring Understanding: Musicians connect their personal interests, experiences, ideas, and knowledge to creating performing and responding.
Essential Question: How do musicians make meaningful connections to creating, performing and responding?

HS Proficient
MU:Cn10.0.T.HSI
Demonstrate how interests, knowledge and skills relate to personal choices and intent when creating, performing, and responding to music.

HS Accomplished
MU:Cn10.0.T.HSII
Demonstrate how interests, knowledge and skills relate to personal choices and intent when creating, performing, and responding to music.

HS Advanced
MU:Cn10.0.T.HSIII
Demonstrate how interests, knowledge and skills relate to personal choices and intent when creating, performing, and responding to music.

Music Technology/Connecting
#MU:Cn11.0.T
Process Component: MTS - Connect #11- Relate musical ideas and works to varied contexts and daily life to deepen understanding.
Anchor Standard: Relate artistic ideas and works with societal, cultural and historical context to deepen understanding.
Enduring Understanding: Understanding connections to varied contexts and daily life enhances musicians' creating, performing, and responding.
Essential Question: How do the other arts, other disciplines, contexts and daily life inform creating, performing, and responding to music?

HS Proficient
MU:Cn11.0.T.HSI
Demonstrate *understanding* of relationships between music and the other arts, other disciplines, varied contexts and daily life.

HS Accomplished
MU:Cn11.0.T.HSII
Demonstrate understanding of relationships between music and the other arts, other disciplines, varied contexts and daily life.

HS Advanced
MU:Cn11.0.T.HSIII
Demonstrate understanding of relationships between music and the other arts, other disciplines, varied contexts and daily life.

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GLOSSARY: MUSIC

AB
Musical form consisting of two sections, A and B, which contrast with each other (binary form)

ABA
Musical form consisting of three sections, A, B, and A; two are the same, and the middle one is different (ternary form)

Ability
Natural aptitude in specific skills and processes; what the student is apt to do, without formal instruction

Academic vocabulary
words that traditionally are used in academic dialogue and text

Analog tools
Category of musical instruments and tools that are non-digital (i.e., do not transfer sound in or convert sound into binary code), such as acoustic instruments, microphones, monitors, and speakers

Analysis
(See **Analyze**)

Analyze
Examine in detail the structure and context of the music

Arrangement
Setting or adaptation of an existing musical composition

Arranger
Person who creates alternative settings or adaptations of existing music

Articulation
Characteristic way in which musical tones are connected, separated, or accented; types of articulation include legato (smooth, connected tones) and staccato (short, detached tones)

Artistic literacy
Knowledge and understanding required to participate authentically in the Arts

Atonality
Music in which no tonic or key center is apparent

Audiate
Hear and comprehend sounds in one's head (inner hearing), even when no sound is present

Audience etiquette

Social behavior observed by those attending musical performances and which can vary depending upon the type of music performed

Beat
Underlying steady pulse present in most music

Benchmark
Pre-established definition of an achievement level, designed to help measure student progress toward a goal or standard, expressed either in writing or as an example of cored student work (aka, anchor set)

Binary form
(See **AB**)

Body percussion
Use of the human body as an instrument to create percussive/rhythmic sounds such as stomping, patsching (patting thighs), clapping, clicking, snapping

Bordun
Accompaniment created by sounding two tones, five notes apart, continuously throughout a composition; can be performed in varying ways, such as simultaneously or alternating

Chant
Most commonly, the rhythmic recitation of rhymes, or poems without a sung melody; a type of singing, with a simple, unaccompanied melody line and free rhythm

Chart
Jazz or popular music score, often abbreviated, with a melody (including key and time signature) and a set of chord changes

Chord progression
Series of chords sounding in succession; certain progressions are typical in particular styles/genres of music

Collaboratively
Working together on a common (musical) task or goal

Collaboratively-developed criteria
Qualities or traits for assessing achievement level that have been through a process of collective decision-making

Complex formal structure
Musical form in which rhythmic, melodic, harmonic, and/or other musical materials undergo significant expansion and development, and may be more distantly related across sections while remaining coherent in some way, such as sonata or other novel design with three or more sections

Composer
One who creates music compositions

Composition
Original piece of music that can be repeated, typically developed over time, and preserved either in notation or in a sound recording

Compositional devices
Tools used by a composer or arranger to create or organize a composition or arrangement, such as tonality, sequence, repetition, instrumentation, orchestration, harmonic/melodic structure, style, and form

Compositional procedures
Techniques that a composer initiates and continues in pieces to develop musical ideas, such as fragmentation, imitation, sequencing, variation, aggregate completion, registral saturation, contour inversion of gestures, and rhythmic phrasing

Compositional techniques
Approaches a composer uses to manipulate and refine the elements to convey meaning and intent in a composition, such as tension-release, augmentation-diminution, sound-silence, motion-stasis, in addition to compositional devices

Concepts, music
Understandings or generalized ideas about music that are formed after learners make connections and determine relationships among ideas

Connection
Relationship among artistic ideas, personal meaning, and/or external context

Context
Environment that surrounds music, influences understanding, provides meaning, and connects to an event or occurrence

Context, cultural
Values, beliefs, and traditions of a group of people that influence musical meaning and inform culturally authentic musical practice

Context, historical
Conditions of the time and place in which music was created or performed that provide meaning and influence the musical experience

Context, personal
Unique experiences and relationships that surround a single person and are influenced by personal life, family, habits, interest, and preferences

Context, social environment
Surrounding something or someone's creation or intended audience that reflects and influences how people use and interpret the musical experience

Craftsmanship
Degree of skill and ability exhibited by a creator or performer to manipulate the elements of music in a composition or performance

Create
Conceive and develop new artistic ideas, such as an improvisation, composition, or arrangement, into a work

Creative intent

Shaping of the elements of music to express and convey emotions, thoughts, and ideas '

Creator
One who originates a music composition, arrangement, or improvisation

Criteria
Guidelines used to judge the quality of a student's performance (See **Rubric**)

Cultural context
Values, beliefs, and traditions of a group of people that influence musical meaning and inform culturally authentic musical practice

Culturally authentic performance
Presentation that reflects practices and interpretation representative of the style and traditions of a culture

Culture
Values and beliefs of a particular group of people, from a specific place or time, expressed through characteristics such as tradition, social structure, religion, art, and food

Cyclical structure
Musical form characterized by the return or "cycling around" of significantly recognizable themes, motives, and/or patterns across movements

Demonstrate
Show musical understanding through observable behavior such as moving, chanting, singing, or playing instruments

Diatonic
Seven-tone scale consisting of five whole steps and two half steps

Digital environment
Simulated place made or created through the use of one or more computers, sensors, or equipment

Digital notation
A visual image of musical sound created by using computer software applications, intended either as a record of sound heard or imagined, or as a set of visual instructions for performers

Digital resources
Anything published in a format capable of being read by a computer, a web-enabled device, a digital tablet, or smartphone

Digital systems
Platforms that allow interaction and the conversion between and through the audio and digital domains

Digital tools
Category of musical instruments and tools that manipulate sound using binary code, such as electronic keyboards, digital audio interfaces, MIDI, and computer software

Dynamics
Level or range of loudness of a sound or sounds

Elements of music
Basic characteristics of sound (pitch, rhythm, harmony, dynamics, timbre, texture, form, and style/articulation) that are manipulated to create music

Enduring understanding
Overarching (aka, "big") ideas that are central to the core of the music discipline and may be transferred to new situations

Ensemble
Group of individuals organized to perform artistic work: traditional, large groups such as bands, orchestras, and choirs; chamber, smaller groups, such as duets, trios, and quartets; emerging, such as guitar, iPad, mariachi, steel drum or pan, and Taiko drumming

Essential question
Question that is central to the core of a discipline –in this case, music – and promotes investigation to uncover corresponding enduring understanding(s)

Established criteria
Traits or dimensions for making quality judgments in music of a particular style, genre, cultural context, or historical period that have gained general acceptance and application over time

Expanded form
Basic form (such as AB, ABA, rondo or theme and variation) expanded by the addition of an introduction, transition, and/or coda

Explore
Discover, investigate, and create musical ideas through singing, chanting, playing instruments, or moving to music

Expression
Feeling conveyed through music

Expressive aspects
Characteristics that convey feeling in the presentation of musical ideas

Expressive intent
The emotions, thoughts, and ideas that a performer or composer seeks to convey by manipulating the elements of music

Expressive qualities
Qualities such as dynamics, tempo, articulation which -- when combined with other elements of music -- give a composition its musical identity

Form
Element of music describing the overall organization of a piece of music, such as AB, ABA, rondo, theme and variations, and strophic form

Formal design

Large-scale framework for a piece of music in which the constituent parts cohere into a meaningful whole; encompasses both structural and tonal aspects of the piece

Fret
Thin strip of material placed across the fingerboard of some stringed Instruments, such as guitar, banjo, and mandolin; the fingers press the strings against the frets to determine pitch

Function
Use for which music is created, performed, or experienced, such as dance, social, recreation, music therapy, video games, and advertising

Fundamentals of music theory
Basic elements of music, their subsets, and how they interact: rhythm and meter; pitch and clefs; intervals; scales, keys and key signatures; triads and seventh chords

Fusion
Type of music created by combining contrasting styles into a new style

Genre
Category of music characterized by a distinctive style, form, and/or content, such as jazz, march, and country

Guidance
Assistance provided temporarily to enable a student to perform a musical task that would be difficult to perform unaided, best implemented in a manner that helps develop that student's capacity to eventually perform the task independently

Harmonic sequences
Series of two or more chords commonly used to support melody(ies)

Harmonizing instruments
musical instruments, such as guitars, ukuleles, and keyboards, capable of producing harmonies as well as melodies, often used to provide chordal accompaniments for melodies and songs

Harmonization
Process of applying stylistically appropriate harmony, such as chords, countermelodies, and ostinato, to melodic material

Harmony
Chordal structure of a music composition in which the simultaneous sounding of pitches produces chords and their successive use produces chord progressions

Heterophonic
Musical texture in which slightly different versions of the same melody sound simultaneously

Historical context
Conditions of the time and place in which music was created or performed and that provide meaning and influence the musical experience

Historical periods

Period of years during which music that was created and/or performed shared common characteristics; historians of Western art music typically refer to the following: Medieval (ca. 500-ca. 1420), Renaissance (ca. 1420-ca. 1600), Baroque (ca. 1600-ca. 1750), Classic (ca. 1750-ca. 1820), Romantic (ca. 1820-ca. 1900), and Contemporary (ca. 1900-)

Homophonic
Musical texture in which all parts move in the same rhythm but use different pitches, as in hymns; also, a melody supported by chords

Iconic notation
Representation of sound and its treatment using lines, drawings, pictures

Imagine
Generate musical ideas for various purposes and contexts

Imagination
Ability to generate in the mind ideas, concepts, sounds, and images that are not physically present and may not have been previously experienced (See **Audiate**)

Improvisation
Music created and performed spontaneously or "in-the-moment," often within a framework determined by the musical style

Improviser
One who creates music spontaneously or "in-the-moment"

Independently
Working with virtually no assistance, initiating appropriate requests for consultation, performing in a self-directed ensemble offering ideas/solutions that make such consulting collaborative rather than teacher-directed

Intent
Meaning or feeling of the music planned and conveyed by a creator or performer

Interpret
Determine and demonstrate music's expressive intent and meaning when responding and performing

Interpretation
Intent and meaning that a performer realizes in studying and performing a piece of music

Intervals
Distance between two tones, named by counting all pitch names involved; harmonic interval occurs when two pitches are sounded simultaneously, and melodic interval when two pitches are sounded successively

Intonation
Singing or playing the correct pitch in tune

Key signature
Set of sharps or flats at the beginning of the staff, following the clef sign, that indicates the primary pitch set or scale used in the music and provide clues to the resting tone and mode

Lead-sheet notation

System symbol used to identify chords in jazz, popular, and folk music; uppercase letters are written above the staff, specifying which chords should be used and when they should be played

Lyrics
Words of a song

Major scale
Scale in which the ascending pattern of whole and half steps is whole, whole, half, whole, whole, whole, half

Melodic contour
Shape of a melody created by the way its pitches repeat and move up and down in steps and skips

Melodic passage
Short section or series of notes within a larger work that constitutes a single coherent melodic idea

Melodic pattern
Grouping, generally brief, of tones or pitches

Melody
Linear succession of sounds (pitches) and silences moving through time; the horizontal structure of music

Meter
Grouping of beats and divisions of beats in music, often in sets of twos (duple meter) or threes (triple meter)

Minor scale
Scale in which one characteristic feature is a half-step between the second and third tones; the three forms of the minor scale are natural, harmonic, and melodic

Modal
Music based on a mode other than major or minor

Modes
Seven-tone scales that include five whole steps and two half steps; the seven possible modes —Ionian, Dorian, Phrygian, Lydian, Mixolydian, Aeolian, and Locrian— were used in the Medieval and Renaissance periods and served as the basis from which major (Ionian) and minor (Aeolian) scales emerged

Model cornerstone assessment
Suggested assessment process, embedded within a unit of study, that includes a series of focused tasks to measure student achievement within multiple process components

Moderately complex formal structure
Musical form with three or more sections (such as rounded binary, rondo, or other novel design), in which section closure is somewhat nuanced or ambiguous, and the rhythmic, melodic, harmonic, and/or other musical materials across sections may be more distantly related while remaining coherent in some way

Mood
Over-all feeling that a section or piece of music conveys

Monophonic
Musical texture consisting of a single, unaccompanied melodic line

Motif/motive
Brief rhythmic/melodic figure or pattern that recurs throughout a composition as a unifying element

Movement
Act of moving in nonlocomotor (such as clapping and finger snapping) and locomotor (such as walking and running) patterns to represent and interpret musical sounds

Music literacy
Knowledge and understanding required to participate authentically in the discipline of music by independently carrying out the artistic processes of creating, performing, and responding

Music theory
Study of how music is composed and performed; analysis of the elements of music and the framework for understanding musical works

Music vocabulary
Domain-specific words traditionally used in performing, studying, or describing music (See Academic vocabulary)

Musical criteria
Traits relevant to assessing music attributes of a work or performance

Musical idea
Idea expressed in music, which can range in length from the smallest meaningful level (motive or short pattern) through a phrase, a section, or an entire piece

Musical range
Span between the highest and lowest pitches of a melody, instrument, or voice

Musical work
Piece of music preserved as a notated copy or sound recording or passed through oral tradition

Non-pitched instruments
Instruments, such as woodblocks, whistles, electronic sounds, that do not have definite pitches or tones

Notation
Visual representation of musical sounds

One-part formal structure
Continuous form, with or without an interruption, in which a singular instance of formal closure is achieved only at or near the end of the piece; also known as through-composed

Open-ended assessment
Assessment that allows students to demonstrate the learning of a particular outcome in a variety of ways, such as demonstrating understanding of rhythmic notation by moving, singing, or chanting

Pentatonic scale
Five-tone scale often identified with the pattern of the black keys of a keyboard, although other five-tone arrangements are possible

Perform
Process of realizing artistic ideas and work through interpretation and presentation

Performing, performance
Experience of engaging in the act of presenting music in a classroom or private or public venue (See also Artistic Process of Performing)

Performance decorum
Aspects of contextually appropriate propriety and proper behavior, conduct, and appearance for a musical performance, such as stage presence, etiquette, and appropriate attire

Performance practice
Performance and presentation of a work that reflect established norms for the style and social, cultural, and historical contexts of that work

Performance technique
Personal technical skills developed and used by a performer

Personal context
Unique experiences and relationships that surround a single person and are influenced by personal life, family, habits, interest, and preferences

Personally-developed criteria
Qualities or traits for assessing achievement level developed by students individually

Phrase
Musical segment with a clear beginning and ending, comparable to a simple sentence or clause in written text

Phrasing
Performance of a musical phrase that uses expressive qualities such as dynamics, tempo, articulation, and timbre to convey a thought, mood, or feeling

Piece
General, non-technical term referring to a composition or musical work

Pitch
Identification of a tone or note with respect to highness or lowness (i.e., frequency)

Plan
Select and develop musical ideas for creating a musical work

Polyphonic
Musical texture in which two or more melodies sound simultaneously

Polytonal
Music in which two or more tonalities (keys) sound simultaneously

Present
Share artistic work (e.g., a composition) with others

Program
Presentation of a sequence of musical works that can be performed by individual musicians or groups in a concert, recital, or other setting

Purpose
Reason for which music is created, such as, ceremonial, recreational/social, commercial, or generalized artistic expression

Refine
Make changes in musical works or performances to more effectively realize intent through technical quality or expression

Repertoire
Body or set of musical works that can be performed

Respond
Understand and evaluate how the arts convey meaning

Rhythm
Duration or length of sounds and silences that occur in music; organization of sounds and silences in time

Rhythmic passage
Short section or series of notes within a larger work that constitutes a single coherent rhythmic idea

Rhythmic pattern
Grouping, generally brief, of long and short sounds and silences

Rondo
Musical form consisting of three or more contrasting sections in which one section recurs, such as ABACA

Rubric
Established, ordered set of criteria for judging student performance; includes descriptors of student work at various levels of achievement

Scale
Pattern of pitches arranged in ascending or descending order and identified by their specific arrangement of whole and half steps

Score
Written notation of an entire music composition

Section
One of a number of distinct segments that together comprise a composition; a section consists of several phrases

Select
Choose music for performing, rehearsing, or responding based on interest, knowledge, ability, and context

Sensitivity

Skill of a creator, performer, or listener in responding to and conveying the nuances of sound or expression

Set
Sequence of songs or pieces performed together by a singer, band, or disc jockey and constituting or forming part of a live show or recording

Setting
Specified or implied instrumentation, voicing, or orchestration of a musical work

Setting of the text
Musical treatment of text as presented in the music

Share
Present artistic work (e.g., a composition) to others

Sight-reading
First attempt to perform a notated musical work

Simple formal structure
Musical form with a small number of distinct or clearly delineated sections, (such as simple binary, ternary, or other novel design), using closely related rhythmic, melodic, and harmonic materials across the sections

Social context
Environment surrounding something or someone's creation or intended audience that reflects and influences how people use and interpret the musical experience

Sonic events
Individual sounds (or sound masses) and silences whose succession forms patterns and contrasting units that are perceived as musical

Sonic experience
Perception and understanding of the sounds and silences of a musical work and their inter-relationship

Stage presence
Performer's ability to convey music content to a live audience through traits such as personal knowledge of the repertoire, exhibited confidence, decorum, eye contact and facial expression

Staging
Environmental considerations, such as lighting, sound, seating arrangement, and visual enhancements, that contribute to the impact of a musical performance

Standard notation
System for visually representing musical sound that is in widespread use; such systems include traditional music staff notation, tablature notation (primarily for fretted stringed instruments), and lead-sheet notation

Storyline
Extra-musical narrative that inspires or explains the structure of a piece of music

Strophic form

Vocal music in which the music repeats with a new set of text each time

Structural
(See **Structure**)
Structure
Totality of a musical work

Style
Label for a type of music possessing distinguishing characteristics and often performance practices associated with its historical period, cultural context, and/or genre

Stylistic expression
Interpretation of expressive qualities in a manner that is authentic and appropriate to the genre, historical period, and cultural context of origin

Tablature
System of graphic standard notation, commonly used for fretted stringed instruments, in which a diagram visually represents both the fret board and finger placement on the fret board

Teacher-provided criteria
Qualities or traits for assessing achievement level that are provided to students by the teacher

Technical aspects
Characteristics enabling the accurate representation/presentation of musical ideas

Technical challenges
Requirements of a particular piece of music that stretch or exceed a performer's current level of proficiency in technical areas such as timbre, intonation, diction, range, or speed of execution

Technical accuracy, technical skill
Ability to perform with appropriate timbre, intonation, and diction as well as to play or sing the correct pitches and rhythms at a tempo appropriate to the musical work

Tempo
Rate or speed of the beat in a musical work or performance

Tension/release
Musical device (musical stress, instability, or intensity, followed by musical relaxation, stability, or resolution) used to create a flow of feeling

Ternary form
(See **ABA**)

Texture
Manner in which the harmonic (vertical) and melodic (horizontal) elements are combined to create layers of sound

Theme and variations
Musical form in which a melody is presented and then followed by two or more sections presenting variations of that melody

Theoretical
(See **Fundamentals of Music Theory**)

Timbre
Tone color or tone quality that distinguishes one sound source, instrument, or voice from another

Tonal pattern
Grouping, generally brief, of tones or pitches

Tonality
Tonic or key tone around which a piece of music is centered

Transfer
Use music knowledge and skills appropriately in a new context

Unity
Presence of structural coherence within a work, generally achieved through the repetition of various elements of music (See **Variety**)

Variety
Presence of structural contrast within a work for the purpose of creating and sustaining interest, generally achieved through utilizing variations in the treatment of the elements of music (See **Unity**)

Venue
Physical setting in which a musical event takes place

Vocables
Audible sounds and/or nonsense syllables used by vocalists to convey musical ideas or intent

Vocalizations
Vocal exercises that include no text and are sung to one or more vowels

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~~IDAHO CONTENT STANDARDS~~
~~GRADE 7-12~~
~~HUMANITIES: WORLD LANGUAGES - LEVEL 1~~

~~Standard 1: Acquisition and use of language.~~

~~Students comprehend and communicate in the target language through listening, reading, writing, and speaking.~~

~~Level 1 students use the four skills of language acquisition (listening, speaking, reading, and writing) with respect to very basic vocabulary. Students comprehend the language in context when spoken slowly and clearly by teachers or teaching resources. Students read short, modified texts and differentiate symbols, words, questions, and statements. Students write in short simple sentences. Students speak in rehearsed responses to rehearsed questions. The output of a level one student is comprehensible to a sympathetic world languages teacher.~~

~~Goal 1.1: Listening~~

~~Objective(s): Upon completion of Level 1, the student will be able to:~~

~~7-12.WL1.1.1.1 Comprehend basic vocabulary in isolation and in context.~~
~~7-12.WL1.1.1.2 Capture essential information from everyday conversations and short passages (e.g., cognates, context clues).~~
~~7-12.WL1.1.1.3 Recognize basic sentence types (e.g., questions, sentences, commands, negative and positive).~~
~~7-12.WL1.1.1.4 Comprehend question words (e.g., who, what, when, where, how). 7-~~
~~12.WL1.1.1.5 Recognize number and gender signals.~~
~~7-12.WL1.1.1.6 Distinguish between formal and informal address.~~

~~Goal 1.2: Speaking~~

~~Objective(s): Upon completion of Level 1, the student will be able to:~~

~~7-12.WL1.1.2.1 Use basic vocabulary to respond to familiar prompts. 7-~~
~~12.WL1.1.2.2 Express preferences, desires, opinions, and feelings.~~
~~7-12.WL1.1.2.3 Use appropriate level of politeness in simulated social exchanges.~~

~~Goal 1.3: Reading~~

~~Objective(s): Upon completion of Level 1, the student will be able to:~~

~~7-12.WL1.1.3.1 Decode written text, diacritical marks, and symbolic systems. 7-~~
~~12.WL1.1.3.2 Recognize written forms of basic vocabulary.~~
~~7-12.WL1.1.3.3 Associate the written text with spoken forms. 7-~~
~~12.WL1.1.3.4 Recognize cognates and borrowed words.~~

~~Goal 1.4: Writing~~

~~Objective(s): Upon completion of Level 1, the student will be able to:~~

~~7-12.WL1.1.4.1 Write basic vocabulary and short sentences (e.g., from dictation, picture cues, cloze activities, word banks).~~

~~7-12.WL1.1.4.2 Write a logical response to a familiar question or comment. 7-~~
~~12.WL1.1.4.3 Rewrite sentences, using substitutions.~~
~~7-12.WL1.1.4.4 Construct simple sentences using familiar vocabulary and phrases.~~

~~Standard 2: Critical Thinking~~

~~Students understand the purposes and functions of world languages. They build literacy and develop critical thinking through analysis and interpretation.~~

~~Level 1 students identify some parts of speech found in basic sentence grammar in the target language. Students demonstrate connections between the target language and English (cognates), determine whether sentences are positive or negative, and begin to use verb patterns (e.g., a specific tense when appropriate). Students use a short, comprehensible sentence structure, although it may not be completely accurate.~~

~~Goal 2.1: Analysis of Language Elements and Products~~

~~Objective(s): Upon completion of Level 1, the student will be able to:~~
~~7-12.WL1.2.1.1 Manipulate components of simple statements, questions, and commands (e.g., parts of speech, punctuation, and word order).~~
~~7-12.WL1.2.1.2 Derive meaning from word order.~~
~~7-12.WL1.2.1.3 Recognize appropriate verb patterns in context or tense. 7-~~
~~12.WL1.2.1.4 Compare linguistic elements among languages.~~
~~7-12.WL1.2.1.5 Recognize systematic changes in word families.~~

~~Goal 2.2: Modification and Manipulation of Language Elements and Products~~

~~Objective(s): Upon completion of Level 1, the student will be able to:~~
~~7-12.WL1.2.2.1 Use systematic changes within word families to expand vocabulary. 7-~~
~~12.WL1.2.2.2 Use acquired verbs appropriately to convey meaning.~~
~~7-12.WL1.2.2.3 Modify sentences to express positive and negative aspects.~~
~~7-12.WL1.2.2.4 Organize components of statements, questions, and commands to convey meaning individually and collaboratively.~~

~~Standard 3: History, Geography, and Culture~~

~~Students demonstrate an understanding of how people and cultures are connected across time in the geographical areas represented by the target languages. Humanities instruction prepares students to work and live as global citizens because of their greater understanding of their own culture and the cultures of others.~~

~~Level 1 students find the areas of the world where the target language is spoken, name those lands and states in which the language is spoken, recall some historical facts about those places, and compare daily activities in their own Idaho culture with those in the target cultures. Students demonstrate awareness of customs of politeness (such as forms of address) in the target culture.~~

~~Goal 3.1: Historical Context~~

~~**Objective(s): Upon completion of Level 1, the student will be able to:**~~

~~7-12.WL1.3.1.1 Recognize major historical and cultural figures and events from the target culture.~~

~~7-12.WL1.3.1.2 Identify historical connections between English and the target language (e.g., cognates, language origins).~~

~~**Goal 3.2: Geographical Context**~~

~~**Objective(s): Upon completion of Level 1, the student will be able to:**~~

~~7-12.WL1.3.2.1 Locate the areas in the world where the target language is spoken. 7-12.WL1.3.2.2 Describe the geographical features of major areas where the target language is spoken.~~

~~**Goal 3.3: Cultural Context**~~

~~**Objective(s): Upon completion of Level 1, the student will be able to:**~~

~~7-12.WL1.3.3.1 Compare and contrast the everyday life and social observances of the target culture with U.S. culture.~~

~~7-12.WL1.3.3.2 Recognize nonverbal cues and body language typically used in the target language.~~

~~7-12.WL1.3.3.3 Use appropriate cultural responses in diverse exchanges (e.g., forms of address, levels of familiarity).~~

~~IDAHO CONTENT STANDARDS~~
~~GRADE 7-12~~
~~HUMANITIES: WORLD LANGUAGES – LEVEL 2~~

~~The student is expected to know content and apply skills from Level 1.~~

Standard 1~~: Acquisition and use of language.~~

~~Students comprehend and communicate in the target language through listening, reading, writing, and speaking.~~

~~Level 2 students use the four language acquisition skills with an expanded, but still basic, vocabulary. Students comprehend aural input in longer and more complex pieces (up to several minutes of input at a time). Students follow classroom directions given in the target language. Students read longer (100 to 250 word) passages, which contain both familiar and unfamiliar vocabulary, and use a variety of strategies to decipher the unfamiliar pieces. Students write paragraph length texts about a variety of familiar topics, in a variety of settings (place and time). Students engage in more extended conversation about rehearsed topics with the teacher and respond to unrehearsed but familiar questions with appropriate language. Students present rehearsed information orally. All student output in the second year should be comprehensible to a sympathetic native speaker and/or teacher of the language.~~

~~Goal 1.1: Listening~~

~~Objective(s): Upon completion of Level 2, the student will be able to:~~

~~7-12.WL2.1.1.1 Comprehend expanding vocabulary in isolation and in context. 7-~~
~~12.WL2.1.1.2 Follow general classroom instruction in the target language.~~
~~7-12.WL2.1.1.3 Distinguish if an action described is taking place in the past, present, or future.~~
~~7-12.WL2.1.1.4 Comprehend speech in a variety of forms (e.g., regional accents, teacher talking in varying rates of delivery).~~

~~Goal 1.2: Speaking~~

~~Objective(s): Upon completion of Level 2, the student will be able to:~~

~~7-12.WL2.1.2.1 Engage in an extended conversation about rehearsed topics.~~
~~7-12.WL2.1.2.2 Retell stories and present information (e.g., from texts, visual clues, Internet sources).~~
~~7-12.WL2.1.2.3 Read texts aloud.~~
~~7-12.WL2.1.2.4 Respond to familiar, unrehearsed questions and situations using appropriate target language.~~

~~Goal 1.3: Reading~~

~~Objective(s): Upon completion of Level 2, the student will be able to:~~

~~7-12.WL2.1.3.1 Read and comprehend short passages consisting of familiar vocabulary. 7-~~
~~12.WL2.1.3.2 Read and comprehend short passages that contain some unfamiliar vocabulary.~~

~~7-12.WL2.1.3.3 Scan authentic sources to gain specific information through visual clues and cognates.~~
~~7-12.WL2.1.3.4 Read more complex, annotated passages with supplied vocabulary.~~

~~Goal 1.4: Writing~~

~~Objective(s): Upon completion of Level 2, the student will be able to:~~
~~7-12.WL2.1.4.1 Write in a variety of forms and tenses, using acquired vocabulary to focus on time, events, and settings.~~
~~7-12.WL2.1.4.2 Create paragraph-length writings about familiar topics.~~

~~Standard 2: Critical Thinking~~

~~Students understand the purposes and functions of world languages. They build literacy and develop critical thinking through analysis and interpretation.~~

~~Level 2 students recognize and derive meaning from correctly used language elements and manipulate these elements to create texts with meaning. Students create output in speech and writing, which demonstrates improving use of grammar elements, verbal expression, and vocabulary. Students express preferences in several ways, ask a variety of questions, and express a variety of needs and wishes.~~

~~Goal 2.1: Analysis of Language Elements and Products~~

~~Objective(s): Upon completion of Level 2, the student will be able to:~~
~~7-12.WL2.2.1.1 Recognize appropriate verb patterns (e.g., tenses and intonations).~~
~~7-12.WL2.2.1.2 Recognize and derive meaning from correctly used language elements (e.g., nouns, pronouns, articles, adjectives, adverbs, prepositions).~~
~~7-12.WL2.2.1.3 Predict meaning of unfamiliar words based on context and word families.~~

~~Goal 2.2: Modification and Manipulation of Language Elements and Products~~

~~Objective(s): Upon completion of Level 2, the student will be able to:~~
~~7-12.WL2.2.2.1 Manipulate language structures to demonstrate comparative and superlative relationships.~~
~~7-12.WL2.2.2.2 Use language structures to express degrees of preference or differences (e.g., "I like hamburgers," "I prefer hamburgers to hotdogs").~~
~~7-12.WL2.2.2.3 Use language-specific structures to show roles of nouns, pronouns, adjectives, and adverbs in context (e.g., subject, possessive, object).~~

~~Standard 3: History, Geography, and Culture~~

~~Students demonstrate an understanding of how people and cultures are connected across time in geographical areas represented by the target languages. Humanities instruction prepares students to work and live as global citizens because of their greater understanding of their own culture and the cultures of others.~~

~~Level 2 students recall the basic geography and history of the target cultures, and furthermore have a deeper understanding of selected regions, persons, and events in the target culture. Students discuss some of the cultural features of the regions in the target language.~~

~~Goal 3.1: Historical Context~~

~~Objective(s): Upon completion of Level 2, the student will be able to:~~

~~7-12.WL2.3.1.1 Analyze the impact of selected historical figures and events on the target culture.~~

~~Goal 3.2: Geographical Context~~

~~Objective(s): Upon completion of Level 2, the student will be able to:~~

~~7-12.WL2.3.2.1 Examine geopolitical regions selected from the target culture (e.g., focus on a city, geographical entity).~~

~~Goal 3.3: Cultural Context~~

~~Objective(s): Upon completion of Level 2, the student will be able to:~~

~~7-12.WL2.3.3.1 Identify unique cultural aspects of regions in the target culture (e.g., food, holidays, customs, celebrations).~~

~~IDAHO CONTENT STANDARDS~~
~~GRADE 7-12~~
~~HUMANITIES: WORLD LANGUAGES – LEVELS 3-4~~

~~The student is expected to know content and apply skills from Levels 1–2.~~

~~Standard 1: Acquisition and use of language.~~

~~Students comprehend and communicate in the target language through listening, reading, writing, and speaking.~~

~~Level 3 and 4 students acquire a variety of more comprehensive vocabulary, varying according to the topics selected during a particular year. Students listen to and comprehend extended spoken lectures, discussions, and media presentations in the target language. Students conduct classroom events in the target language. Students read texts of varying lengths, including stories, Internet texts, short novels, and authentic texts such as advertisements and news articles. Students write about these various topics, using appropriate resources. Students write longer and more accurate pieces. Students participate in unrehearsed classroom conversations in the target language, present formal oral projects, and read aloud comprehensibly. Output from an advanced student should be comprehensible to sympathetic teachers, classmates, and native speakers.~~

~~Goal 1.1: Listening~~

~~Objective(s): Upon completion of Levels 3 – 4, the student will be able to:~~

- ~~7-12.WL3.1.1.1 Comprehend vocabulary related to class themes and literature.~~
- ~~7-12.WL3.1.1.2 Comprehend extended passages and peer conversations in the target language.~~
- ~~7-12.WL3.1.1.3 Gather key information from longer passages.~~
- ~~7-12.WL3.1.1.4 Interpret the intent or meaning of a spoken passage (tone, idioms, nuance, sarcasm, irony).~~
- ~~7-12.WL3.1.1.5 Comprehend authentic speech.~~

~~Goal 1.2: Speaking~~

~~Objective(s): Upon completion of Levels 3 – 4, the student will be able to:~~

- ~~7-12.WL3.1.2.1 Engage in an extended conversation about unrehearsed topics.~~
- ~~7-12.WL3.1.2.2 Use alternatives to express meaning (e.g., circumlocution, synonyms, antonyms).~~
- ~~7-12.WL3.1.2.3 Engage in a planned conversation on a thematic topic (e.g., role playing, panel discussion, discussion of a literary work).~~

~~Goal 1.3: Reading~~

~~Objective(s): Upon completion of Levels 3 – 4, the student will be able to:~~

- ~~7-12.WL3.1.3.1 Acquire new vocabulary through reading.~~
- ~~7-12.WL3.1.3.2 Identify the key elements or main idea of authentic information texts.~~

~~7-12.WL3.1.3.3 Summarize content of passages (e.g., poetry, song lyrics, folktales, fiction, graphic novels, and Internet text).~~
~~7-12.WL3.1.3.4 Read and comprehend extended narratives.~~

~~Goal 1.4: Writing~~

~~Objective(s): Upon completion of Levels 3 - 4, the student will be able to:~~
~~7-12.WL3.1.4.1 Write in a variety of forms about thematic subjects.~~
~~7-12.WL3.1.4.2 Incorporate all acquired tenses, structures, and vocabulary in original works.~~

~~Standard 2: Critical Thinking~~

~~Students understand the purposes and functions of world languages. They build literacy and develop critical thinking through analysis and interpretation.~~

~~Level 3 and 4 students interpret some nuances and the intent of the target language, such as humor, irony, and sarcasm, and begin to use these in their speech and writing. Students speak and write with increasingly correct and complex structures and vocabulary.~~

~~Goal 2.1: Analysis of Language Elements and Products~~

~~Objective(s): Upon completion of Levels 3 - 4, the student will be able to:~~
~~7-12.WL3.2.1.1 Infer meaning of an unfamiliar word based on its grammatical position and origins.~~
~~7-12.WL3.2.1.2 Recognize appropriate verb patterns (e.g., modes, tenses, and intonations).~~
~~7-12.WL3.2.1.3 Compare idiomatic and figurative expressions among languages. 7-12.WL3.2.1.4 Predict the meaning of a word based on its origin and usage in the sentence.~~

~~Goal 2.2: Modification and Manipulation of Language Elements and Products~~

~~Objective(s): Upon completion of Levels 3 - 4, the student will be able to:~~
~~7-12.WL3.2.2.1 Predict outcomes of and infer meaning from authentic written and oral sources (e.g., poetry, lyrics, literature, and Internet).~~
~~7-12.WL3.2.2.2 Use language to achieve complex social objectives (e.g., persuasion, apology, complaints, regrets).~~

~~Standard 3: History, Geography, and Culture~~

~~Students demonstrate an understanding of how people and cultures are connected across time in geographical areas represented by the target languages. Humanities instruction prepares students to work and live as global citizens because of their greater understanding of their own culture and the cultures of others.~~

~~Students demonstrate an understanding of the historical, geographical, and cultural contexts of the target language.~~

~~Level 3 and 4 students examine geography, history, and culture in the context of class themes in the target language.~~

~~Goal 3.1: Historical Context~~

~~Objective(s): Upon completion of Levels 3 - 4, the student will be able to:~~

~~7-12.WL3.3.1.1 Examine selected historical figures and events in depth.~~

~~7-12.WL3.3.1.2 Investigate the historical context of selected examples of art, music, literature, and film from the target culture.~~

~~Goal 3.2: Geographical Context~~

~~7-12.WL3.3.2.1 Discuss geography in context of class themes.~~

~~Goal 3.3: Cultural Context~~

~~Objective(s): Upon completion of Levels 3 - 4, the student will be able to:~~

~~7-12.WL3.3.3.1 React to current events in the target language.~~

~~7-12.WL3.3.3.2 Use Internet resources in the target language to explore a variety of topics.~~

~~7-12.WL3.3.3.3 Demonstrate a willingness to be open and responsive to new and diverse perspectives.~~

ARTS AND HUMANITIES

WORLD LANGUAGE

Approved by the Idaho State Board of Education, August 11, 2016

World Language Standards

Communication

Goal: Communicate effectively in multiple languages and utilize the target language to function in a variety of social/work related situations

Enduring Understanding: Communication and collaboration in more than one language is vital for success in an interconnected world.

Essential Question(s)?

- What is the purpose of language?
- What do humans do with language and to what end?
- How does an increasingly interconnected world impact language learning?

Standards and Objectives:

- Interpersonal communication Standard COMM 1: Interact with others in the target language and gain meaning from interactions in the target language.
  - Objective COMM 1.1: Interact and negotiate meaning (spoken, signed, written conversation) to share information, reactions, feelings, and opinions
- Interpretive communication Standard COMM 2: Discover meaning from what is heard, read or viewed on a variety of topics in the target language
  - Objective COMM 2.1: Understand, interpret, and analyze what is heard, read, or viewed on a variety of topics.
- Presentational communication Standard COMM 3: Utilize appropriate media to present an idea to an audience
  - Objective COMM 3.1: Present information, concepts, and ideas to inform, explain, persuade, and narrate on a variety of topics using appropriate media in the target language.
  - Objective COMM 3.2: Adapt presentation to various audiences of listeners, readers, or viewers.

Cultures

Goal: Interact with cultural competence and understanding in an interconnected world.

Enduring Understanding: The study of culture is deeply intertwined with the study of other languages. Developing an understanding and awareness of other cultures' perspectives is critical in the development of global competence.

Essential Question(s):

- How do a variety of cultures impact our daily lives?
- Why is cultural sensitivity an important part of gaining global competence?

- What is their perspective?
- How does their perspective influence what people do/create?

Standards and Objectives:

- Relating cultural practices to perspective Standard CLTR 1: Investigate, explain and reflect on the relationship between the practices and perspectives of the cultures studied in the target language.
  - Objective CLTR 1.1: Analyze the cultural practices/patterns of behavior accepted as the societal norm in the target culture.
  - Objective CLTR 1.2: Explain the relationship between cultural practices/behaviors and the perspectives that represent the target culture's view of the world.
  - Objective CLTR 1.3: Function appropriately in diverse contexts within the target culture.
- Relating cultural products to perspective Standard CLTR 2: Investigate, explain and reflect on the relationship between the products and perspectives of the cultures studied in the target language.
  - Objective CLTR 2.1: Analyze the significance of a product (art, music, literature, etc.…) in a target culture.
  - Objective CLTR 2.2: Describe the connections of products from the target culture with the practices and perspectives of the culture.
  - Objective CLTR 2.3: Justify the underlying beliefs or values of the target culture that resulted in the creation of the product.

Connections

Goal: Acquire information and diverse perspectives in order to use the target language to connect to other disciplines and to function in academic and career related situations.

Enduring Understanding: Interdisciplinary learning is a critical component in the educational experience of all students. Connecting multiple disciplines builds and reinforces the content Enduring Understanding: Languages and cultures are multi-faceted, the diverse patterns and perspectives inherent to language systems/cultures express meaning in culturally appropriate ways.

Essential Question(s):

- What role does language learning play in the educational experience of students?
- How does connecting to other disciplines make students well-informed global citizens?
- How does extending student access to variety of information and diverse perspectives influence their ability to perform in academic and career related settings?

Standards and Objectives:

- Making connections Standard CONN 1: Build, reinforce, and expand knowledge of other disciplines while using the target language to develop critical thinking/creative problem solving skills.
  - Objective CONN 1.1: Compare and contrast information acquired from other content areas.
  - Objective CONN 1.2: Relate information studied in other subjects to the target language and culture.

- Acquiring information and diverse perspectives Standard CONN 2: Access and evaluate information and diverse perspectives that are available through the target language and its cultures.
  - Objective CONN 2.1: Access authentic materials prepared in the target language by or for native speakers.
  - Objective CONN 2.2: Analyze the content and cultural perspectives of authentic materials prepared in the target language by or for native speakers
  - Objective CONN 2.3: Compare and contrast cultural similarities and differences in authentic materials.

Comparisons

Goal: Develop insight and understanding of target culture and language in order to interact with cultural competence.

Enduring Understanding: Languages and cultures are multi-faceted, the diverse patterns and perspectives inherent to language systems/cultures express meaning in culturally appropriate ways.

Essential Question(s):

- How does the target language differ from the learner's first language?
- How do the target culture's perspectives compare to the learner's perspective?

Standards and Objectives:

- Cultural Comparisons Standard COMP 2: Investigate, explain, and reflect on the concept of culture through the comparisons of the cultures studied and their own.
  - Objective COMP 1.1: Observe formal and informal forms of language.
  - Objective COMP 1.2: Identify patterns and explain discrepancies the sounds and the writing system in the target language.
  - Objective COMP 1.3: Compare and analyze idiomatic expressions in the target language.
- Cultural Comparisons Standard COMP 2: Investigate, explain, and reflect on the concept of culture through the comparisons of the cultures studied and their own.
  - Objective COMP 2.1: Identify, describe and compare/contrast products and their use in the target culture with the learner's culture.
  - Objective COMP 2.2: Compare and contrast appropriate gestures and oral expressions in the target culture with the learner's culture.
  - Objective COMP 2.3: Compare and contrast authentic materials from the target culture with the learner's culture.

Communities

Goal: Communicate and interact with cultural competence in multilingual communities at home and around the world.

Enduring Understanding: The increasing interconnectedness of the world's economy requires that United States citizens continue to become proficient in other languages and adept at understanding and communicating appropriately in cultural contexts.

Essential Question(s):

- How are language proficiency and cultural competence developed?
- How do continued opportunities to learn and use language increase language proficiency over a period of time?
- What personal benefits are there to becoming a lifelong language learner?

Standards and Objectives:

- School and Global Communities Standard COMT 1: Interact and collaborate in communities and the globalized world both within and beyond the classroom.
  - Objective COMT 1.1: Participate in multilingual communities at home and around the world.
  - Objective COMT 1.2: Discuss personal preferences in activities and events both within and beyond the classroom.
  - Objective COMT 1.3: Utilize knowledge of the target language to tutor English language learners that know the target language.
- Lifelong learning Standard COMT 2: Reflect on progress using languages for enjoyment, enrichment, and advancement.
  - Objective COMT 2.1: Interpret materials and/or use media from the language and culture for enjoyment.
  - Objective COMT 2.2: Explore opportunities to use the target language for personal enrichment/professional advancement/communication skills.

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World Language Performance Indicators

COMMUNICATION 1: Interpersonal

Interact with others in the target language and gain meaning from interactions in the target language.

Novice:

a. Express self in conversations that are based upon very familiar topics. Can access a variety of words, phrases, simple sentences, and questions that have been highly practiced and memorized.

b. Respond to basic questions about self and others using a series of highly practiced or memorized phrases.

c. Communicate about self, others, and everyday life using a series of highly practiced or memorized phrases.

Intermediate:

a. Express self and actively participates in conversations on familiar topics using single sentences or a series of sentences.1

b. Handle short social interactions in everyday situations by asking and answering a variety of questions.:

c. Communicate about self, others, and everyday life.

Advanced:

a. Express self fully to maintain conversations on familiar topics and new concrete academic, social and work related topics.

b. Handle changes in situations confidently and share one's point of view in discussions.

c. Communicate in more in-depth conversations about self, others, or events with detail and organization.

Interact with others in the target language and gain meaning from interactions in the target

COMMUNICATION 2: Interpretive

Discover meaning from what is heard, read or viewed on a variety of topics in the target language.

Novice:

a. List key characters and main events from developmentally appropriate narratives based on familiar themes.

b. Report out the content of brief written messages and short personal notes on familiar topics, such as family, school events, and celebrations.

c. Interpret the meaning of gestures, intonation, and other visual or auditory clues.

Intermediate:

a. Identify the principal characters and discuss the main idea and themes with a piece of literature.

b. Locate key ideas/items in authentic materials and relate them to people and objects in one's own life.
c. Restate information and react to messages within short articles or multi-media clips from the target culture.

Advanced:
a. Discuss main ideas and key details of live/recorded discussions, lectures, and presentations from the target culture.
b. Analyze main plot, subplot, characters, their descriptions, roles, and significance in authentic literary texts.
c. Compare and contrast cultural nuances of meaning in written and spoken language as expressed by native speakers from the target culture in both formal and informal settings.

COMMUNICATION 3: Presentational
Utilize appropriate media to present an idea to an audience.

Novice:
Present information about self or others using simple sentences or memorized phrases.

Intermediate:
Express opinions and state facts about self, using a series of sentences.

Advanced:
Deliver an organized presentation about a variety of topics that is appropriate for an audience.
CUES

CULTURES 1: Cultural Practices
Investigate, explain and reflect on the relationship between the practices and perspectives of the cultures studied in the target language.

Novice:
a. Use appropriate gestures within the classroom environment.
b. Imitate appropriate etiquette from the target culture.
c. List cultural practices observed in a video from the target culture.
d. Role-play simple interactions in stores and restaurants in the target culture.

Intermediate:
a. Use formal and informal forms of address appropriately in rehearsed situations.
b. Adjust language and message gradually to acknowledge audiences with varied cultural backgrounds.
c. Suggest reasons for connecting cultural practices to associated products and perspectives.

d. Role-play culturally appropriate interactions (e.g., with shop keepers, ticket sellers, waiters, taxi drivers) in the target culture.

Advanced:
a. Use formal and informal forms of address appropriately in unrehearsed situations.
b. Adjust language, message, and behavior to acknowledge audiences with varied cultural backgrounds.
c. Provide evidence based reasoning for connecting cultural practices to associated products and perspectives.
d. Utilize culturally appropriate behaviors and language in a variety of situations in the target language.

CULTURES 2: Cultural Products
Investigate, explain and reflect on the relationship between the products and perspectives of the cultures studied in the target language.

Novice:
a. Give simple reasons for the role and importance of products from the target culture.
b. Identify the author/country of origin for short poems, stories, or plays from the target culture.
c. Make simple connections between cultural products, associated practices, and possible perspectives from the target culture.

Intermediate:
a. Identify, investigate, and analyze the function of everyday objects produced in the culture.
b. Identify and analyze cultural products found in literature, news stories, and films from the target culture.
c. Create connections based on background knowledge between cultural products, associated practices, and perspectives.

Advanced:
a. Research in detail the role and importance of products from the target cultures.
b. Identify and analyze the role and importance of cultural products found in literature, news stories, and film.
c. Provide evidence-based insights connecting cultural products, associated practices, and perspectives.

CONNECTIONS 1: Making Connections
Build, reinforce, and expand knowledge of other disciplines while using the target language to develop critical thinking/creative problem solving skills..

Novice:
a. Use skills gained in other content areas to study key figures/events in the target culture.

b. Use skills gained in other content areas to convert currencies, weights, and measures from the United States' standard to that of the target culture in order to understand prices, size and distance.
c. Use skills gained in other content areas to identify the similarities and differences between the cultural norm in the United States and that of the target culture (e.g., food, clothing, music).
d. Read text from the target culture, such as maps, using skills gained in other content areas.

Intermediate:
a. Seek out sources in the target language for content presently or previously studied in history and English.
b. Use skills gained in other content areas to analyze the impact of currencies rates, and measurement systems on the global economy.
c. Analyze and discuss the similarities and differences between the cultural norm in the United States and that of the target culture (e.g. food, clothing, music) using knowledge from other content areas.
d. Analyze text from the target culture using skills gained in other content areas.

Advanced:
a. Write a critical analysis for a movie where the target language is spoken.
b. Research and discuss how various governmental structures might impact global issues.
c. Explore, discuss, and debate topics from other academic subjects (e.g., political and historical concepts, worldwide health issues, and environmental concerns).
d. Write and/or produce an original work that highlights a challenge facing people in countries where the target language in spoken.

CONNECTIONS 2: Acquiring Information/Perspectives
Access and evaluate information and diverse perspectives that are available through the target language and its cultures.

Novice:
a. Interpret main idea from infographics showing statistics, such as number of endangered species, or changes in population.
b. Identify main idea of current events reported in the news about the target culture.
c. Access short texts and multi-media from the target culture.

Intermediate:
a. Access charts and surveys about daily life in the target culture and compare this information with similar events in the United States.
b. Compare current events reported in the news to similar events in the United States.
c. View publicity and promotional information from the target culture.

Advanced:
a. Research an issue of global importance and provide insight into the issue from the perspective of the target culture.

b. Research and debate current events in the target culture.
c. Compare, analyze, and discuss how and why advertisements for the same product differ in the target culture and the United States.

COMPARISONS 1: Language
Investigate, explain, and reflect on the nature of language through comparisons of the language studied and their own.

Novice:
a. Compare word order and sentence structure between one's own language and the target language.
b. Observe the use of formal and informal structures in the target language.
c. Report similarities and differences between the sound and writing systems of one's own language and the target language.

Intermediate:
a. Hypothesize regarding the similarities of languages based on the use of cognates and idioms.
b. Match groups of people with ways of expressing respect in the target culture.
c. Identify patterns and explain discrepancies between the sound and writing systems of one's own language and the target language.

Advanced:
a. Compare the choice/use of particular grammatical structures among languages.
b. Identify, compare, and analyze how language reflects culture and regional/national linguistic patterns in the target language.
c. Compare the writing system of the target language to one's own, and discuss the nature of other writing systems.

COMPARISONS 2: Culture
Investigate, explain, and reflect on the concept of culture through the comparisons of the cultures studied and their own.

Novice:
a. Compare daily routines, celebrations etc. in one's culture and the target culture.
b. Identify, describe, and compare/contrast products and their use in the target culture and one's own (e.g., toys, clothing, and food).
c. Observe, identify, and compare/contrast simple patterns of behavior or interactions in various settings in the target culture and one's own.
d. Identify and discuss similarities and differences in themes and techniques in creative works from the target cultures and one's own.

Intermediate:

a. Compare and contrast the role of family, schools schedules, value of social media etc. in one's culture and the target culture.
b. Identify, investigate, and compare/contrast the function of everyday objects (e.g., toys, tools, clothing, food) produced in the target culture and one's own.
c. Document and contrast verbal and non- verbal behavior in daily activities among peers or mixed groups in the target culture and one's own.
d. Hypothesize regarding the relationship between cultural perspectives and expressive products (e.g., visual arts, music, and literature) through analyzing selected products for the target culture and one's own.

Advanced:

a. Compare and contrast the value placed on work, leisure time, health and wellness, the environment, and technology in one's culture and the target culture.
b. Identify, analyze, and discuss tangible and intangible products and their use in the target culture and one's own as represented through authentic materials.
c. Compare cultural nuances of meanings of words, idioms, and vocal inflections in the target language and one's own.
d. Identify, examine, and analyze the relationship between cultural products, practices, and perspectives in the target culture and one's own by conducting research, observations, or interviews.

COMMUNITIES 1: School and Global Communities

Interact and collaborate in communities and the globalized world both within and beyond the classroom.

Novice:

a. Communicate on a personal level with speakers of the language in person or via email, video chats, or other electronic means.
b. Identify professions that require proficiency in another language.
c. Simulate interactions that might take place in a community setting using the target culture/language

Intermediate:

a. Present information gained from a native speaker about a cultural event or topic of interest in the target language.
b. Discuss steps to becoming a professional in a field requiring language proficiency.
c. Discuss preferences/opinions concerning leisure activities and current events, in written form or orally, with peers who speak the target language and/or students in class.

Advanced:

a. Communicate orally or in writing with members of the other culture regarding topics of personal interest, community issues, or world concerns.

b. Participate in a career exploration or school- to-work project which requires proficiency in the language and culture.
c. Discuss and express opinions on current events and issues through interpersonal oral or written exchanges with speakers of the target language and/or students in class.

COMMUNITIES 2: Lifelong Learning
Reflect on progress using languages for enjoyment, enrichment, and advancement.

Novice:
a. Reflect on one's progress in communication skills and collect evidence to support.
b. Explore and interpret media and materials from the target culture for enjoyment.
c. Attend cultural or social events from the target culture.

Intermediate:
a. Collect evidence showing that learning targets for each unit have been met.
b. Exchange information with native speakers, and use various media to view cultural events for entertainment/learning.
c. Seek community /online activities that foster an interaction with native speakers of the target language

Advanced:
a. Document language growth through collecting evidence and records that support meeting or exceeding the learning targets for each unit.
b. Attend events or use media from the target culture for entertainment or personal growth.
c. Explore online resources to find sites of personal interest, using the target language to maintain and increase one's language skills.

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IDAHO
STATE DEPARTMENT OF EDUCATION

ARTS AND HUMANITIES

MEDIA ARTS

Approved by the Idaho State Board of Education, August 11, 2016

K-3 Media Arts

Media Arts/Creating
#MA:Cr1.1.1
Process Component: Conceive
Anchor Standard: Generate and conceptualize artistic ideas and work.
Enduring Understanding: Media arts ideas, works, and processes are shaped by the imagination, creative processes, and by experiences, both within and outside of the arts.
Essential Question: How do media artists generate ideas? How can ideas for media arts productions be formed and developed to be effective and original?

Grade K
MA:Cr1.1.1.K
Discover and share ideas for media artworks using play and experimentation.

Grade 1
MA:Cr1.1.1.1
Express and share ideas for media artworks through sketching and modeling.

Grade 2
MA:Cr1.1.1.2
Discover multiple ideas for media artworks through brainstorming and improvising.

Grade 3
MA:Cr1.1.1.3
Develop multiple ideas for media artworks using a variety of tools, methods and/or materials.

Media Arts/Creating
#MA:Cr2.1.1
Process Component: Develop
Anchor Standard: Organize and develop artistic ideas and work.
Enduring Understanding: Media artists plan, organize, and develop creative ideas, plans, and models into process structures that can effectively realize the artistic idea.
Essential Question: How do media artists organize and develop ideas and models into process structures to achieve the desired end product?

Grade K
MA:Cr2.1.1.K
With guidance, use ideas to form plans or models for media arts productions.

Grade 1
MA:Cr2.1.1.1
With guidance, use identified ideas to form plans and models for media arts productions.

Grade 2
MA:Cr2.1.1.2
Choose ideas to create plans and models for media arts productions.

Grade 3
MA:Cr2.1.1.3
Form, share, and test ideas, plans, and models to prepare for media arts productions.

Media Arts/Creating
#MA:Cr3.1
Process Component: Construct
Anchor Standard: Refine and complete artistic work.
Enduring Understanding: The forming, integration, and refinement of aesthetic components, principles, and processes creates purpose, meaning, and artistic quality in media artworks.
Essential Question: What is required to produce a media artwork that conveys purpose, meaning, and artistic quality? How do media artists improve/refine their work?

Grade K
MA:Cr3.1.K
a. Form and capture media arts content for expression and meaning in media arts productions.
b. Make changes to the content, form, or presentation of media artworks and share results.

Grade 1
MA:Cr3.1.1
a. Create, capture, and assemble media arts content for media arts productions, identifying basic principles, such as pattern and repetition.
b. Practice and identify the effects of making changes to the content, form, or presentation, in order to refine and finish media artworks.

Grade 2
MA:Cr3.1.2
a. Construct and assemble content for unified media arts productions, identifying and applying basic principles, such as positioning and attention.
b. Test and describe expressive effects in altering, refining, and completing media artworks.

Grade 3
MA:Cr3.1.3
a. Construct and order various content into unified, purposeful media arts productions, describing and applying a defined set of principles, such as movement and force.
b. Practice and analyze how the emphasis of elements alters effect and purpose in refining and completing media artworks.

Media Arts/Producing
#MA:Pr4.1
Process Component: Integrate
Anchor Standard: Select, analyze, and interpret artistic work for presentation.
Enduring Understanding: Media artists integrate various forms and contents to develop complex, unified artworks.
Essential Question: How are complex media arts experiences constructed?

Grade K
MA:Pr4.1.K

With guidance, combine arts forms and media content, such as dance and video, to form media artworks.

Grade 1
MA:Pr4.1.1
Combine varied academic, arts, and media content in media artworks, such as an illustrated story.

Grade 2
MA:Pr4.1.2
Practice combining varied academic, arts, and media content into unified media artworks, such as a narrated science animation.

Grade 3
MA:Pr4.1.3
Practice combining varied academic, arts, and media forms and content into unified media artworks, such as animation, music, and dance.

Media Arts/Producing
#MA:Pr5.1
Process Component: Practice
Anchor Standard: Develop and refine artistic techniques and work for presentation.
Enduring Understanding: Media artists require a range of skills and abilities to creatively solve problems within and through media arts productions.
Essential Question: What skills are required for creating effective media artworks and how are they improved? How are creativity and innovation developed within and through media arts productions? How do media artists use various tools and techniques?

Grade K
MA:Pr5.1.K
a. Identify and demonstrate basic skills, such as handling tools, making choices, and cooperating in creating media artworks.
b. Identify and demonstrate creative skills, such as performing, within media arts productions.
c. Practice, discover, and share how media arts creation tools work.

Grade 1
MA:Pr5.1.1
a. Describe and demonstrate various artistic skills and roles, such as technical steps, planning, and collaborating in media arts productions.
b. Describe and demonstrate basic creative skills within media arts productions, such as varying techniques.
c. Experiment with and share different ways to use tools and techniques to construct media artworks.

Grade 2
MA:Pr5.1.2
a. Enact roles to demonstrate basic ability in various identified artistic, design, technical, and soft skills, such as tool use and collaboration in media arts productions.
b. Demonstrate use of experimentation skills, such as playful practice, and trial and error, within and through media arts productions.
c. Demonstrate and explore identified methods to use tools to capture and form media artworks.

Grade 3
MA:Pr5.1.3
a. Exhibit developing ability in a variety of artistic, design, technical, and organizational roles, such as making compositional decisions, manipulating tools, and group planning in media arts productions.
b. Exhibit basic creative skills to invent new content and solutions within and through media arts productions.
c. Exhibit standard use of tools and techniques while constructing media artworks.

Media Arts/Producing
#MA:Pr6.1
Process Component: Present
Anchor Standard: Convey meaning through the presentation of artistic work.
Enduring Understanding: Media artists purposefully present, share, and distribute media artworks for various contexts.
Essential Question: How do time, place, audience, and context affect presenting or performing choices for media artworks? How can presenting or sharing media artworks in a public format help a media artist learn and grow?

Grade K
MA:Pr6.1.K
a. With guidance, identify and share roles and the situation in presenting media artworks.
b. With guidance, identify and share reactions to the presentation of media artworks.

Grade 1
MA:Pr6.1.1
a. With guidance, discuss presentation conditions and perform a task in presenting media artworks.
b. With guidance, discuss the experience of the presentation of media artworks.

Grade 2
MA:Pr6.1.2
a. Identify and describe presentation conditions and perform task(s) in presenting media artworks.
b. Identify and describe the experience and share results of presenting media artworks.

Grade 3
MA:Pr6.1.3
a. Identify and describe the presentation conditions, and take on roles and processes in presenting or distributing media artworks.
b. Identify and describe the experience, and share results of and improvements for presenting media artworks.

Media Arts/Responding
#MA:Re7.1
Process Component: Perceive
Anchor Standard: Perceive and analyze artistic work.
Enduring Understanding: Identifying the qualities and characteristics of media artworks improves one's artistic appreciation and production.

Essential Question: How do we 'read' media artworks and discern their relational components? How do media artworks function to convey meaning and manage audience experience?

Grade K
MA:Re7.1.K
a. Recognize and share components and messages in media artworks.
b. Recognize and share how a variety of media artworks create different experiences.

Grade 1
MA:Re7.1.1
a. Identify components and messages in media artworks.
b. With guidance, identify how a variety of media artworks create different experiences.
Grade 2
MA:Re7.1.2
a. Identify and describe the components and messages in media artworks.
b. Identify and describe how a variety of media artworks create different experiences.

Grade 3
MA:Re7.1.3
a. Identify and describe how messages are created by components in media artworks.
b. Identify and describe how various forms, methods, and styles in media artworks manage audience experience.

Media Arts/Responding
#MA:Re8.1
Process Component: Interpret
Anchor Standard: Interpret intent and meaning in artistic work.
Enduring Understanding: Interpretation and appreciation require consideration of the intent, form, and context of the media and artwork.
Essential Question: How do people relate to and interpret media artworks?

Grade K
MA:Re8.1.K
With guidance, share observations regarding a variety of media artworks.

Grade 1
MA:Re8.1.1
With guidance, identify the meanings of a variety of media artworks.

Grade 2
MA:Re8.1.2
Determine the purposes and meanings of media artworks, considering their context.

Grade 3
MA:Re8.1.3
Determine the purposes and meanings of media artworks while describing their context.

Media Arts/Responding
#MA:Re9.1
Process Component: Evaluate
Anchor Standard: Apply criteria to evaluate artistic work.
Enduring Understanding: Skillful evaluation and critique are critical components of experiencing, appreciating, and producing media artworks.
Essential Question: How and why do media artists value and judge media artworks? When and how should we evaluate and critique media artworks to improve them?

Grade K
MA:Re9.1.K
Share appealing qualities and possible changes in media artworks.

Grade 1
MA:Re9.1.1
Identify the effective parts of and possible changes to media artworks considering viewers.
Grade 2
MA:Re9.1.2
Discuss the effectiveness of and improvements for media artworks, considering their context.

Grade 3
MA:Re9.1.3
Identify basic criteria for and evaluate media artworks, considering possible improvements and context.

Media Arts/Connecting
#MA:Cn10.1
Process Component: Synthesize
Anchor Standard: Synthesize and relate knowledge and personal experiences to make art.
Enduring Understanding: Media artworks synthesize meaning and form cultural experience.
Essential Question: How do we relate knowledge and experiences to understanding and making media artworks? How do we learn about and create meaning through producing media artworks?

Grade K
MA:Cn10.1.K
a.Use personal experiences and choices in making media artworks.
b.Share memorable experiences of media artworks.

Grade 1
MA:Cn10.1.1
a.Use personal experiences, interests, and models in creating media artworks.
b.Share meaningful experiences of media artworks.
Grade 2
MA:Cn10.1.2
a. Use personal experiences, interests, information, and models in creating media artworks.
b. Discuss experiences of media artworks, describing their meaning and purpose.

Grade 3
MA:Cn10.1.3

a. Use personal and external resources, such as interests, information, and models, to create media artworks.
b. Identify and show how media artworks form meanings, situations, and/or culture, such as popular media.

Media Arts/Connecting
#MA:Cn11.1
Process Component: Relate
Anchor Standard: Relate artistic ideas and works with societal, cultural, and historical context to deepen understanding.
Enduring Understanding: Media artworks and ideas are better understood and produced by relating them to their purposes, values, and various contexts.
Essential Question: How does media arts relate to its various contexts, purposes, and values? How does investigating these relationships inform and deepen the media artist's understanding and work?

Grade K
MA:Cn11.1.K
a. With guidance, share ideas in relating media artworks and everyday life, such as daily activities.
b. With guidance, interact safely and appropriately with media arts tools and environments.
Grade 1
MA:Cn11.1.1
a. Discuss and describe media artworks in everyday life, such as popular media, and connections with family and friends.
b. Interact appropriately with media arts tools and environments, considering safety, rules, and fairness.

Grade 2
MA:Cn11.1.2
a. Discuss how media artworks and ideas relate to everyday and cultural life, such as media messages and media environments.
b. Interact appropriately with media arts tools and environments, considering safety, rules, and fairness.

Grade 3
MA:Cn11.1.3
a. Identify how media artworks and ideas relate to everyday and cultural life and can influence values and online behavior.
b. Examine and interact appropriately with media arts tools and environments, considering safety, rules, and fairness.

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4-5 Media Arts

Media Arts/Creating
#MA:Cr1.1.1
Process Component: Conceive
Anchor Standard: Generate and conceptualize artistic ideas and work.
Enduring Understanding: Media arts ideas, works, and processes are shaped by the imagination, creative processes, and by experiences, both within and outside of the arts.
Essential Question: How do media artists generate ideas? How can ideas for media arts productions be formed and developed to be effective and original?

Grade 4
MA:Cr1.1.1.4
Conceive of original artistic goals for media artworks using a variety of creative methods, such as brainstorming and modeling.

Grade 5
MA:Cr1.1.1.5
Envision original ideas and innovations for media artworks using personal experiences and/or the work of others.

Media Arts/Creating
#MA:Cr2.1.1
Process Component: Develop
Anchor Standard: Organize and develop artistic ideas and work.
Enduring Understanding: Media artists plan, organize, and develop creative ideas, plans, and models into process structures that can effectively realize the artistic idea.
Essential Question: How do media artists organize and develop ideas and models into process structures to achieve the desired end product?

Grade 4
MA:Cr2.1.1.4
Discuss, test, and assemble ideas, plans, and models for media arts productions, considering the artistic goals and the presentation.

Grade 5
MA:Cr2.1.1.5
Develop, present, and test ideas, plans, models, and proposals for media arts productions, considering the artistic goals and audience.

Media Arts/Creating
#MA:Cr3.1
Process Component: Construct
Anchor Standard: Refine and complete artistic work.
Enduring Understanding: The forming, integration, and refinement of aesthetic components, principles, and processes creates purpose, meaning, and artistic quality in media artworks.
Essential Question: What is required to produce a media artwork that conveys purpose, meaning, and artistic quality? How do media artists improve/refine their work?

Grade 4
MA:Cr3.1.4
a. Structure and arrange various content and components to convey purpose and meaning in different media arts productions, applying sets of associated principles, such as balance and contrast.
b. Demonstrate intentional effect in refining media artworks, emphasizing elements for a purpose.

Grade 5
MA:Cr3.1.5
a. Create content and combine components to convey expression, purpose, and meaning in a variety of media arts productions, utilizing sets of associated principles, such as emphasis and exaggeration.
b. Determine how elements and components can be altered for clear communication and intentional effects, and refine media artworks to improve clarity and purpose.

Media Arts/Producing
#MA:Pr4.1
Process Component: Integrate
Anchor Standard: Select, analyze, and interpret artistic work for presentation.
Enduring Understanding: Media artists integrate various forms and contents to develop complex, unified artworks.
Essential Question: How are complex media arts experiences constructed?

Grade 4
MA:Pr4.1.4
Demonstrate how a variety of academic, arts, and media forms and content may be mixed and coordinated into media artworks, such as narrative, dance, and media.

Grade 5
MA:Pr4.1.5
Create media artworks through the integration of multiple contents and forms, such as a media broadcast.

Media Arts/Producing
#MA:Pr5.1
Process Component: Practice
Anchor Standard: Develop and refine artistic techniques and work for presentation.
Enduring Understanding: Media artists require a range of skills and abilities to creatively solve problems within and through media arts productions.
Essential Question: What skills are required for creating effective media artworks and how are they improved? How are creativity and innovation developed within and through media arts productions? How do media artists use various tools and techniques?

Grade 4
MA:Pr5.1.4
a. Enact identified roles to practice foundational artistic, design, technical, and soft skills, such as formal technique, equipment usage, production, and collaboration in media arts productions.
b. Practice foundational innovative abilities, such as design thinking, in addressing problems within and through media arts productions.

c. Demonstrate use of tools and techniques in standard and novel ways while constructing media artworks.

Grade 5

MA:Pr5.1.5

a. Enact various roles to practice fundamental ability in artistic, design, technical, and soft skills, such as formal technique, production, and collaboration in media arts productions.

b. Practice fundamental creative and innovative abilities, such as expanding conventions, in addressing problems within and through media arts productions.

c. Examine how tools and techniques could be used in standard and experimental ways in constructing media artworks.

Media Arts/Producing

#MA:Pr6.1

Process Component: Present

Anchor Standard: Convey meaning through the presentation of artistic work.

Enduring Understanding: Media artists purposefully present, share, and distribute media artworks for various contexts.

Essential Question: How do time, place, audience, and context affect presenting or performing choices for media artworks? How can presenting or sharing media artworks in a public format help a media artist learn and grow?

Grade 4

MA:Pr6.1.4

a. Explain the presentation conditions, and fulfill a role and processes in presenting or distributing media artworks.

b. Explain results of and improvements for presenting media artworks.

Grade 5

MA:Pr6.1.5

a. Compare qualities and purposes of presentation formats, and fulfill a role and associated processes in presentation and/or distribution of media artworks.

b. Compare results of and improvements for presenting media artworks.

Media Arts/Responding

#MA:Re7.1

Process Component: Perceive

Anchor Standard: Perceive and analyze artistic work.

Enduring Understanding: Identifying the qualities and characteristics of media artworks improves one's artistic appreciation and production.

Essential Question: How do we 'read' media artworks and discern their relational components? How do media artworks function to convey meaning and manage audience experience?

Grade 4

MA:Re7.1.4

a. Identify, describe, and explain how messages are created by components in media artworks.

b. Identify, describe, and explain how various forms, methods, and styles in media artworks manage audience experience.

Grade 5
MA:Re7.1.5
a. Identify, describe, and differentiate how message and meaning are created by components in media artworks.
b. Identify, describe, and differentiate how various forms, methods, and styles in media artworks manage audience experience.

Media Arts/Responding
#MA:Re8.1
Process Component: Interpret
Anchor Standard: Interpret intent and meaning in artistic work.
Enduring Understanding: Interpretation and appreciation require consideration of the intent, form, and context of the media and artwork.
Essential Question: How do people relate to and interpret media artworks?

Grade 4
MA:Re8.1.4
Determine and explain reactions and interpretations to a variety of media artworks, considering their purpose and context.
Grade 5
MA:Re8.1.5
Determine and compare personal and group interpretations of a variety of media artworks, considering their intention and context.

Media Arts/Responding
#MA:Re9.1
Process Component: Evaluate
Anchor Standard: Apply criteria to evaluate artistic work.
Enduring Understanding: Skillful evaluation and critique are critical components of experiencing, appreciating, and producing media artworks.
Essential Question: How and why do media artists value and judge media artworks? When and how should we evaluate and critique media artworks to improve them?

Grade 4
MA:Re9.1.4
Identify and apply basic criteria for evaluating and improving media artworks and production processes, considering context.
Grade 5
MA:Re9.1.5
Determine and apply criteria for evaluating media artworks and production processes, considering context, and practicing constructive feedback.

Media Arts/Connecting
#MA:Cn10.1
Process Component: Synthesize
Anchor Standard: Synthesize and relate knowledge and personal experiences to make art.
Enduring Understanding: Media artworks synthesize meaning and form cultural experience.

Essential Question: How do we relate knowledge and experiences to understanding and making media artworks? How do we learn about and create meaning through producing media artworks?

Grade 4
MA:Cn10.1.4
a. Examine and use personal and external resources, such as interests, research, and cultural understanding, to create media artworks.
b. Examine and show how media artworks form meanings, situations, and/or cultural experiences, such as online spaces.

Grade 5
MA:Cn10.1.5
a. Access and use internal and external resources to create media artworks, such as interests, knowledge, and experiences.
b. Examine and show how media artworks form meanings, situations, and cultural experiences, such as news and cultural events.

Media Arts/Connecting
#MA:Cn11.1
Process Component: Relate
Anchor Standard: Relate artistic ideas and works with societal, cultural, and historical context to deepen understanding.
Enduring Understanding: Media artworks and ideas are better understood and produced by relating them to their purposes, values, and various contexts.
Essential Question: How does media arts relate to its various contexts, purposes, and values? How does investigating these relationships inform and deepen the media artist's understanding and work?

Grade 4
MA:Cn11.1.4
a. Explain verbally and/or in media artworks, how media artworks and ideas relate to everyday and cultural life, such as fantasy and reality, and technology use.
b. Examine and interact appropriately with media arts tools and environments, considering ethics, rules, and fairness.

Grade 5
MA:Cn11.1.5
a. Research and show how media artworks and ideas relate to personal, social and community life, such as exploring commercial and information purposes, history, and ethics.
b. Examine, discuss and interact appropriately with media arts tools and environments, considering ethics, rules, and media literacy.

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6-8 Media Arts

Media Arts/Creating
#MA:Cr1.1.1
Process Component: Conceive
Anchor Standard: Generate and conceptualize artistic ideas and work.
Enduring Understanding: Media arts ideas, works, and processes are shaped by the imagination, creative processes, and by experiences, both within and outside of the arts.
Essential Question: How do media artists generate ideas? How can ideas for media arts productions be formed and developed to be effective and original?

Grade 6
MA:Cr1.1.1.6
Formulate variations of goals and solutions for media artworks by practicing chosen creative processes, such as sketching, improvising and brainstorming.

Grade 7
MA:Cr1.1.1.7
Produce a variety of ideas and solutions for media artworks through producing a variety of ideas and solutions for media artworks through application of chosen inventive processes, such as concept modeling and prototyping.

Grade 8
MA:Cr1.1.1.8
Generate ideas, goals, and solutions for original media artworks through application of focused creative processes, such as divergent thinking and experimenting.

Media Arts/Creating
#MA:Cr2.1.1
Process Component: Develop
Anchor Standard: Organize and develop artistic ideas and work.
Enduring Understanding: Media artists plan, organize, and develop creative ideas, plans, and models into process structures that can effectively realize the artistic idea.
Essential Question: How do media artists organize and develop ideas and models into process structures to achieve the desired end product?

Grade 6
MA:Cr2.1.1.6
Organize, propose, and evaluate artistic ideas, plans, prototypes, and production processes for media arts productions, considering purposeful intent.

Grade 7
MA:Cr2.1.1.7
Design, propose, and evaluate artistic ideas, plans, prototypes, and production processes for media arts productions, considering expressive intent and resources.

Grade 8
MA:Cr2.1.1.8
Structure and critique ideas, plans, prototypes, and production processes for media arts productions, considering intent, resources, and the presentation context.

Media Arts/Creating
#MA:Cr3.1
Process Component: Construct
Anchor Standard: Refine and complete artistic work.
Enduring Understanding: The forming, integration, and refinement of aesthetic components, principles, and processes creates purpose, meaning, and artistic quality in media artworks.
Essential Question: What is required to produce a media artwork that conveys purpose, meaning, and artistic quality? How do media artists improve/refine their work?

Grade 6
MA:Cr3.1.6
a. Experiment with multiple approaches to produce content and components for determined purpose and meaning in media arts productions, utilizing a range of associated principles, such as point of view and perspective.
b. Appraise how elements and components can be altered for intentional effects and audience, and refine media artworks to reflect purpose and audience.

Grade 7
MA:Cr3.1.7
a. Coordinate production processes to integrate content and components for determined purpose and meaning in media arts productions, demonstrating understanding of associated principles, such as narrative structures and composition.
b. Improve and refine media artworks by intentionally emphasizing particular expressive elements to reflect an understanding of purpose, audience, or place.

Grade 8
MA:Cr3.1.8
a. Implement production processes to integrate content and stylistic conventions for determined meaning in media arts productions, demonstrating understanding of associated principles, such as theme and unity.
b. Refine and modify media artworks, improving technical quality and intentionally accentuating selected expressive and stylistic elements, to reflect an understanding of purpose, audience, and place.

Media Arts/Producing
#MA:Pr4.1
Process Component: Integrate
Anchor Standard: Select, analyze, and interpret artistic work for presentation.
Enduring Understanding: Media artists integrate various forms and contents to develop complex, unified artworks.
Essential Question: How are complex media arts experiences constructed?

Grade 6
MA:Pr4.1.6

Validate how integrating multiple contents and forms can support a central idea in a media artwork, such as media, narratives, and performance.

Grade 7
MA:Pr4.1.7
Integrate multiple contents and forms into unified media arts productions that convey consistent perspectives and narratives, such as an interactive video game.

Grade 8
MA:Pr4.1.8
Integrate multiple contents and forms into unified media arts productions that convey specific themes or ideas, such as interdisciplinary projects, or multimedia theatre.

Media Arts/Producing
#MA:Pr5.1
Process Component: Practice
Anchor Standard: Develop and refine artistic techniques and work for presentation.
Enduring Understanding: Media artists require a range of skills and abilities to creatively solve problems within and through media arts productions.
Essential Question: What skills are required for creating effective media artworks and how are they improved? How are creativity and innovation developed within and through media arts productions? How do media artists use various tools and techniques?

Grade 6
MA:Pr5.1.6
a. Develop a variety of artistic, design, technical, and soft skills through performing various assigned roles in producing media artworks, such as invention, formal technique, production, self-initiative, and problem-solving.
b. Develop a variety of creative and adaptive innovation abilities, such as testing constraints, in developing solutions within and through media arts productions.
c. Demonstrate adaptability using tools and techniques in standard and experimental ways in constructing media artworks.

Grade 7
MA:Pr5.1.7
a. Exhibit an increasing set of artistic, design, technical, and soft skills through performing various roles in producing media artworks, such as creative problem-solving and organizing.
b. Exhibit an increasing set of creative and adaptive innovation abilities, such as exploratory processes, in developing solutions within and through media arts productions.
c. Demonstrate adaptability using tools and techniques in standard and experimental ways to achieve an assigned purpose in constructing media artworks.

Grade 8
MA:Pr5.1.8
a. Demonstrate a defined range of artistic, design, technical, and soft skills, through performing specified roles in producing media artworks, such as strategizing and collaborative communication.
b. Demonstrate a defined range of creative and adaptive innovation abilities, such as divergent solutions and bending conventions, in developing new solutions for identified problems within and through media arts productions.

c. Demonstrate adaptability using tools, techniques and content in standard and experimental ways to communicate intent in the production of media artworks.

Media Arts/Producing
#MA:Pr6.1
Process Component: Present
Anchor Standard: Convey meaning through the presentation of artistic work.
Enduring Understanding: Media artists purposefully present, share, and distribute media artworks for various contexts.
Essential Question: How do time, place, audience, and context affect presenting or performing choices for media artworks? How can presenting or sharing media artworks in a public format help a media artist learn and grow?

Grade 6
MA:Pr6.1.6
a. Analyze various presentation formats and fulfill various tasks and defined processes in the presentation and/or distribution of media artworks.
b. Analyze results of and improvements for presenting media artworks.

Grade 7
MA:Pr6.1.7
a. Evaluate various presentation formats in order to fulfill various tasks and defined processes in the presentation and/or distribution of media artworks.
b. Evaluate the results of and improvements for presenting media artworks, considering impacts on personal growth.

Grade 8
MA:Pr6.1.8
a. Design the presentation and distribution of media artworks through multiple formats and/or contexts.
b. Evaluate the results of and implement improvements for presenting media artworks, considering impacts on personal growth and external effects.

Media Arts/Responding
#MA:Re7.1
Process Component: Perceive
Anchor Standard: Perceive and analyze artistic work.
Enduring Understanding: Identifying the qualities and characteristics of media artworks improves one's artistic appreciation and production.
Essential Question: How do we 'read' media artworks and discern their relational components? How do media artworks function to convey meaning and manage audience experience?

Grade 6
MA:Re7.1.6
a. Identify, describe, and analyze how message and meaning are created by components in media artworks.
b. Identify, describe, and analyze how various forms, methods, and styles in media artworks manage audience experience.

Grade 7
MA:Re7.1.7
a. Describe, compare, and analyze the qualities of and relationships between the components in media artworks.
b. Describe, compare, and analyze how various forms, methods, and styles in media artworks interact with personal preferences in influencing audience experience.

Grade 8
MA:Re7.1.8
a. Compare, contrast, and analyze the qualities of and relationships between the components and style in media artworks.
b. Compare, contrast, and analyze how various forms, methods, and styles in media artworks manage audience experience and create intention.

Media Arts/Responding
#MA:Re8.1
Process Component: Interpret
Anchor Standard: Interpret intent and meaning in artistic work.
Enduring Understanding: Interpretation and appreciation require consideration of the intent, form, and context of the media and artwork.
Essential Question: How do people relate to and interpret media artworks?

Grade 6
MA:Re8.1.6
Analyze the intent of a variety of media artworks, using given criteria.

Grade 7
MA:Re8.1.7
Analyze the intent and meaning of a variety of media artworks, using self-developed criteria.

Grade 8
MA:Re8.1.8
Analyze the intent and meanings of a variety of media artworks, focusing on intentions, forms, and various contexts.

Media Arts/Responding
#MA:Re9.1
Process Component: Evaluate
Anchor Standard: Apply criteria to evaluate artistic work.
Enduring Understanding: Skillful evaluation and critique are critical components of experiencing, appreciating, and producing media artworks.
Essential Question: How and why do media artists value and judge media artworks? When and how should we evaluate and critique media artworks to improve them?

Grade 6
MA:Re9.1.6
Determine and apply specific criteria to evaluate various media artworks and production processes, considering context and practicing constructive feedback.

Grade 7
MA:Re9.1.7
Develop and apply criteria to evaluate various media artworks and production processes, considering context, and practicing constructive feedback.

Grade 8
MA:Re9.1.8
Evaluate media art works and production processes with developed criteria, considering context and artistic goals.

Media Arts/Connecting
#MA:Cn10.1
Process Component: Synthesize
Anchor Standard: Synthesize and relate knowledge and personal experiences to make art.
Enduring Understanding: Media artworks synthesize meaning and form cultural experience.
Essential Question: How do we relate knowledge and experiences to understanding and making media artworks? How do we learn about and create meaning through producing media artworks?

Grade 6
MA:Cn10.1.6
a. Access, evaluate, and use internal and external resources to create media artworks, such as knowledge, experiences, interests, and research.
b. Explain and show how media artworks form new meanings, situations, and cultural experiences, such as historical events.

Grade 7
MA:Cn10.1.7
a. Access, evaluate and use internal and external resources to inform the creation of media artworks, such as experiences, interests, research, and exemplary works.
b. Explain and show how media artworks form new meanings and knowledge, situations, and cultural experiences, such as learning, and new information.

Grade 8
MA:Cn10.1.8
a. Access, evaluate, and use internal and external resources to inform the creation of media artworks, such as cultural and societal knowledge, research, and exemplary works.
b. Explain and demonstrate how media artworks expand meaning and knowledge, and create cultural experiences, such as local and global events.

Media Arts/Connecting
#MA:Cn11.1
Process Component: Relate
Anchor Standard: Relate artistic ideas and works with societal, cultural, and historical context to deepen understanding.
Enduring Understanding: Media artworks and ideas are better understood and produced by relating them to their purposes, values, and various contexts.

Essential Question: How does media arts relate to its various contexts, purposes, and values? How does investigating these relationships inform and deepen the media artist's understanding and work?

Grade 6
MA:Cn11.1.6
a. Research and show how media artworks and ideas relate to personal life, and social, community, and cultural situations, such as personal identity, history, and entertainment.
b. Analyze and interact appropriately with media arts tools and environments, considering fair use and copyright, ethics, and media literacy.
Grade 7
MA:Cn11.1.7
a. Research and demonstrate how media artworks and ideas relate to various situations, purposes and values, such as community, vocations, and social media.
b. Analyze and responsibly interact with media arts tools and environments, considering copyright, ethics, media literacy, and social media.

Grade 8
MA:Cn11.1.8
a. Demonstrate and explain how media artworks and ideas relate to various contexts, purposes, and values, such as democracy, environment, and connecting people and places.
b. Analyze and responsibly interact with media arts tools, environments, legal, and technological contexts, considering ethics, media literacy, social media, and virtual worlds.

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High School Media Arts

Media Arts/Creating
#MA:Cr1.1.1
Process Component: Conceive
Anchor Standard: Generate and conceptualize artistic ideas and work.
Enduring Understanding: Media arts ideas, works, and processes are shaped by the imagination, creative processes, and by experiences, both within and outside of the arts.
Essential Question: How do media artists generate ideas? How can ideas for media arts productions be formed and developed to be effective and original?

HS Proficient
MA:Cr1.1.1.HSI
Identify generative methods to formulate multiple ideas, develop artistic goals, and problem solve in media arts creation processes.

HS Accomplished
MA:Cr1.1.1.HSII
Strategically utilize generative methods to formulate multiple ideas, refine artistic goals, and increase the originality of approaches in media arts creation processes.

HS Advanced
MA:Cr1.1.1.HSIII
Integrate aesthetic principles with a variety of generative methods to fluently form original ideas, solutions, and innovations in media arts creation processes.

Media Arts/Creating
#MA:Cr2.1.1
Process Component: Develop
Anchor Standard: Organize and develop artistic ideas and work.
Enduring Understanding: Media artists plan, organize, and develop creative ideas, plans, and models into process structures that can effectively realize the artistic idea.
Essential Question: How do media artists organize and develop ideas and models into process structures to achieve the desired end product?

HS Proficient
MA:Cr2.1.1.HSI
Apply aesthetic criteria in developing, proposing, and refining artistic ideas, plans, prototypes, and production processes for media arts productions, considering original inspirations, goals, and presentation context.

HS Accomplished
MA:Cr2.1.1.HSII
Apply a personal aesthetic in designing, testing, and refining original artistic ideas, prototypes, and production strategies for media arts productions, considering artistic intentions, constraints of resources, and presentation context.

HS Advanced
MA:Cr2.1.1.HSIII
Integrate a sophisticated personal aesthetic and knowledge of systems processes in forming, testing, and proposing original artistic ideas, prototypes, and production frameworks, considering complex constraints of goals, time, resources, and personal limitations.

Media Arts/Creating
#MA:Cr3.1
Process Component: Construct
Anchor Standard: Refine and complete artistic work.
Enduring Understanding: The forming, integration, and refinement of aesthetic components, principles, and processes creates purpose, meaning, and artistic quality in media artworks.
Essential Question: What is required to produce a media artwork that conveys purpose, meaning, and artistic quality? How do media artists improve/refine their work?

HS Proficient
MA:Cr3.1.HSI
a. Consolidate production processes to demonstrate deliberate choices in organizing and integrating content and stylistic conventions in media arts productions, demonstrating understanding of associated principles, such as emphasis and tone.
b. Refine and modify media artworks, honing aesthetic quality and intentionally accentuating stylistic elements, to reflect an understanding of personal goals and preferences.

HS Accomplished
MA:Cr3.1.HSII
a. Consolidate production processes to demonstrate deliberate choices in organizing and integrating content and stylistic conventions in media arts production, demonstrating understanding of associated principles, such as continuity and juxtaposition.
b. Refine and elaborate aesthetic elements and technical components to intentionally form impactful expressions in media artworks for specific purposes, intentions, audiences and contexts.

HS Advanced
MA:Cr3.1.HSIII
a. Synthesize content, processes, and components to express compelling purpose, story, emotion, or ideas in complex media arts productions, demonstrating mastery of associated principles, such as hybridization.
b. Intentionally and consistently refine and elaborate elements and components to form impactful expressions in media artworks, directed at specific purposes, audiences, and contexts.

Media Arts/Producing
#MA:Pr4.1
Process Component: Integrate
Anchor Standard: Select, analyze, and interpret artistic work for presentation.
Enduring Understanding: Media artists integrate various forms and contents to develop complex, unified artworks.
Essential Question: How are complex media arts experiences constructed?

HS Proficient

MA:Pr4.1.HSI
Integrate various arts, media arts forms, and content into unified media arts productions, considering the reaction and interaction of the audience, such as experiential design.

HS Accomplished
MA:Pr4.1.HSII
Integrate various arts, media arts forms, and academic content into unified media arts productions that retain thematic integrity and stylistic continuity, such as transmedia productions.

HS Advanced
MA:Pr4.1.HSIII
a. Synthesize various arts, media arts forms and academic content into unified media arts productions that retain artistic fidelity across platforms, such as transdisciplinary productions.

Media Arts/Producing
#MA:Pr5.1
Process Component: Practice
Anchor Standard: Develop and refine artistic techniques and work for presentation.
Enduring Understanding: Media artists require a range of skills and abilities to creatively solve problems within and through media arts productions.
Essential Question: What skills are required for creating effective media artworks and how are they improved? How are creativity and innovation developed within and through media arts productions? How do media artists use various tools and techniques?

HS Proficient
MA:Pr5.1.HSI
a. Demonstrate progression in artistic, design, technical, and soft skills, as a result of selecting and fulfilling specified roles in the production of a variety of media artworks.
b. Develop and refine a determined range of creative and adaptive innovation abilities, such as design thinking, and risk taking, in addressing identified challenges and constraints within and through media arts productions.
c. Demonstrate adaptation and innovation through the combination of tools, techniques and content, in standard and innovative ways, to communicate intent in the production of media artworks.

HS Accomplished
MA:Pr5.1.HSII
a. Demonstrate effective command of artistic, design, technical and soft skills in managing and producing media artworks.
b. Demonstrate effective ability in creative and adaptive innovation abilities, such as resisting closure, and responsive use of failure, to address sophisticated challenges within and through media arts productions.
c. Demonstrate the skillful adaptation and combination of tools, styles, techniques, and interactivity to achieve specific expressive goals in the production of a variety of media artworks.

HS Advanced
MA:Pr5.1.HSIII
a. Employ mastered artistic, design, technical, and soft skills in managing and producing media artworks.
b. Fluently employ mastered creative and innovative adaptability in formulating lines of inquiry and solutions, to address complex challenges within and through media arts productions.

c. Independently utilize and adapt tools, styles, and systems in standard, innovative, and experimental ways in the production of complex media artworks.

Media Arts/Producing
#MA:Pr6.1
Process Component: Present
Anchor Standard: Convey meaning through the presentation of artistic work.
Enduring Understanding: Media artists purposefully present, share, and distribute media artworks for various contexts.
Essential Question: How do time, place, audience, and context affect presenting or performing choices for media artworks? How can presenting or sharing media artworks in a public format help a media artist learn and grow?

HS Proficient
MA:Pr6.1.HSI
a. Design the presentation and distribution of collections of media artworks, considering combinations of artworks, formats, and audiences.
b. Evaluate and implement improvements in presenting media artworks, considering personal and local impacts, such as the benefits for self and others.

HS Accomplished
MA:Pr6.1.HSII
a. Curate and design the presentation and distribution of collections of media artworks through a variety of contexts, such as mass audiences, and physical and virtual channels.
b. Evaluate and implement improvements in presenting media artworks, considering personal, local, and social impacts such as changes that occurred for people, or to a situation.

HS Advanced
MA:Pr6.1.HSIII
a. Curate, design, and promote the presentation and distribution of media artworks for intentional impacts, through a variety of contexts, such as markets and venues.
b. Independently evaluate, compare, and integrate improvements in presenting media artworks, considering personal to global impacts, such as new understandings that were gained by artist and audience.

Media Arts/Responding
#MA:Re7.1
Process Component: Perceive
Anchor Standard: Perceive and analyze artistic work.
Enduring Understanding: Identifying the qualities and characteristics of media artworks improves one's artistic appreciation and production.
Essential Question: How do we 'read' media artworks and discern their relational components? How do media artworks function to convey meaning and manage audience experience?

HS Proficient
MA:Re7.1.HSI
a. Analyze the qualities of and relationships between the components, style, and preferences communicated by media artworks and artists.

b. Analyze how a variety of media artworks manage audience experience and create intention through multimodal perception.

HS Accomplished
MA:Re7.1.HSII
a. Analyze and synthesize the qualities and relationships of the components in a variety of media artworks, and feedback on how they impact audience.
b. Analyze how a broad range of media artworks manage audience experience, create intention and persuasion through multimodal perception.

HS Advanced
MA:Re7.1.HSIII
a. Analyze and synthesize the qualities and relationships of the components and audience impact in a variety media artworks.
b. Survey an exemplary range of media artworks, analyzing methods for managing audience experience, creating intention and persuasion through multimodal perception, and systemic communications.

Media Arts/Responding
#MA:Re8.1
Process Component: Interpret
Anchor Standard: Interpret intent and meaning in artistic work.
Enduring Understanding: Interpretation and appreciation require consideration of the intent, form, and context of the media and artwork.
Essential Question: How do people relate to and interpret media artworks?

HS Proficient
MA:Re8.1.HSI
Analyze the intent, meanings, and reception of a variety of media artworks, focusing on personal and cultural contexts.

HS Accomplished
MA:Re8.1.HSII
Analyze the intent, meanings, and influence of a variety of media artworks, based on personal, societal, historical, and cultural contexts.

HS Advanced
MA:Re8.1.HSIII
Analyze the intent, meanings and impacts of diverse media artworks, considering complex factors of context and bias.

Media Arts/Responding
#MA:Re9.1
Process Component: Evaluate
Anchor Standard: Apply criteria to evaluate artistic work.
Enduring Understanding: Skillful evaluation and critique are critical components of experiencing, appreciating, and producing media artworks.
Essential Question: How and why do media artists value and judge media artworks? When and how should we evaluate and critique media artworks to improve them?

HS Proficient
MA:Re9.1.HSI
Evaluate media art works and production processes at decisive stages, using identified criteria, and considering context and artistic goals.

HS Accomplished
MA:Re9.1.HSII
Form and apply defensible evaluations in the constructive and systematic critique of media artworks and production processes.

HS Advanced
MA:Re9.1.HSIII
Develop independently, rigorous evaluations of, and strategically seek feedback for media artworks and production processes, considering complex goals and factors.

Media Arts/Connecting
#MA:Cn10.1
Process Component: Synthesize
Anchor Standard: Synthesize and relate knowledge and personal experiences to make art.
Enduring Understanding: Media artworks synthesize meaning and form cultural experience.
Essential Question: How do we relate knowledge and experiences to understanding and making media artworks? How do we learn about and create meaning through producing media artworks?

HS Proficient
MA:Cn10.1.HSI
Access, evaluate, and integrate personal and external resources to inform the creation of original media artworks, such as experiences, interests, and cultural experiences.
b. Explain and demonstrate the use of media artworks to expand meaning and knowledge, and create cultural experiences, such as learning and sharing through online environments.

HS Accomplished
MA:Cn10.1.HSII
a. Synthesize internal and external resources to enhance the creation of persuasive media artworks, such as cultural connections, introspection, research, and exemplary works.
b. Explain and demonstrate the use of media artworks to synthesize new meaning and knowledge, and reflect and form cultural experiences, such as new connections between themes and ideas, local and global networks, and personal influence.

HS Advanced
MA:Cn10.1.HSIII
a. Independently and proactively access relevant and qualitative resources to inform the creation of cogent media artworks.
b. Demonstrate and expound on the use of media artworks to consummate new meaning, knowledge, and impactful cultural experiences.

Media Arts/Connecting
#MA:Cn11.1

Process Component: Relate
Anchor Standard: Relate artistic ideas and works with societal, cultural, and historical context to deepen understanding.
Enduring Understanding: Media artworks and ideas are better understood and produced by relating them to their purposes, values, and various contexts.
Essential Question: How does media arts relate to its various contexts, purposes, and values? How does investigating these relationships inform and deepen the media artist's understanding and work?

HS Proficient
MA:Cn11.1.HSI
a. Demonstrate and explain how media artworks and ideas relate to various contexts, purposes, and values, such as social trends, power, equality, and personal/cultural identity.
b. Critically evaluate and effectively interact with legal, technological, systemic, and vocational contexts of media arts, considering ethics, media literacy, social media, virtual worlds, and digital identity.

HS Accomplished
MA:Cn11.1.HSII
a. Examine in depth and demonstrate the relationships of media arts ideas and works to various contexts, purposes, and values, such as markets, systems, propaganda, and truth.
b. Critically investigate and ethically interact with legal, technological, systemic, and vocational contexts of media arts, considering ethics, media literacy, digital identity, and artist/audience interactivity.

HS Advanced
MA:Cn11.1.HSIII
a. Demonstrate the relationships of media arts ideas and works to personal and global contexts, purposes, and values, through relevant and impactful media artworks.
b. Critically investigate and strategically interact with legal, technological, systemic, and vocational contexts of media arts.

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GLOSSARY: MEDIA ARTS

Attention
Principle of directing perception through sensory and conceptual impact

Balance
Principle of the equitable and/or dynamic distribution of items in a media arts composition or structure for aesthetic meaning, as in a visual frame, or within game architecture

Components
The discrete portions and aspects of media artworks, including: elements, principles, processes, parts, assemblies, etc., such as: light, sound, space, time, shot, clip, scene, sequence, movie, narrative, lighting, cinematography, interactivity, etc.

Composition
Principle of arrangement and balancing of components of a work for meaning and Message

Constraints
Limitations on what is possible, both real and perceived

Contrast
Principle of using the difference between items, such as elements, qualities and components, to mutually complement them

Continuity
The maintenance of uninterrupted flow, continuous action or self-consistent detail across the various scenes or components of a media artwork, i.e. game components, branding, movie timeline, series, etc.

Context
The situation surrounding the creation or experience of media artworks that influences the work, artist or audience. This can include how, where, and when media experiences take place, as well as additional internal and external factors (personal, societal, cultural, historical, physical, virtual, economic, systemic, etc.)

Convention
An established, common, or predictable rule, method, or practice within media arts production, such as the notion of a ‘hero’ in storytelling

Copyright
The exclusive right to make copies, license, and otherwise exploit a produced work

Digital identity
How one is presented, perceived and recorded online, including personal and collective information and sites, e-communications, commercial tracking, etc.

Divergent thinking
Unique, original, uncommon, idiosyncratic ideas; thinking “outside of the box”

Design thinking
A cognitive methodology that promotes innovative problem solving through the

prototyping and testing process commonly used in design

Emphasis
Principle of giving greater compositional strength to a particular element or component in a media artwork

Ethics
Moral guidelines and philosophical principles for determining appropriate behavior within media arts environments

Exaggeration
Principle of pushing a media arts element or component into an extreme for provocation, attention, contrast, as seen in character, voice, mood, message, etc.

Experiential Design
Area of media arts wherein interactive, immersive spaces and activities are created for the user; associated with entertainment design

Fairness
Complying with appropriate, ethical and equitable rules and guidelines

Fair use
Permits limited use of copyrighted material without acquiring permission from the rights holders, including commentary, search engines, criticism, etc.

Force
Principle of energy or amplitude within an element, such as the speed and impact of a character's motion

Generative methods
Various inventive techniques for creating new ideas and models, such as brainstorming, play, open exploration, experimentation, inverting assumptions, rule-bending, etc.

Hybridization
Principle of combining two existing media forms to create new and original forms, such as merging theatre and multimedia

Interactivity
A diverse range of articulating capabilities between media arts components, such as user, audience, sensory elements, etc., that allow for inputs and outputs of responsive connectivity via sensors, triggers, interfaces, etc., and may be used to obtain data, commands, or information and may relay immediate feedback, or other communications; contains unique sets of aesthetic principles

Juxtaposition
Placing greatly contrasting items together for effect

Legal
The legislated parameters and protocols of media arts systems, including user agreements, publicity releases, copyright, etc.

Manage audience experience
The act of designing and forming user sensory episodes through multi-sensory captivation, such as using sequences of moving image and sound to maintain and carry the viewer's attention, or constructing thematic spaces in virtual or experiential design

Markets
The various commercial and informational channels and forums for media artworks, such as T.V., radio, internet, fine arts, non-profit, communications, etc.

Media arts contexts
The diverse locations and circumstances of media arts, including its markets, networks, technologies and vocations

Media environments
Spaces, contexts and situations where media artworks are produced and experienced, such as in theaters, production studios and online

Media literacy
A series of communication competencies, including the ability to access, analyze, evaluate, and communicate information in a variety of forms, including print and non-print messages – National Association for Media Literacy Education

Media messages
The various artistic, emotional, expressive, prosaic, commercial, utilitarian and informational communications of media artworks

Meaning
The formulation of significance and purposefulness in media artworks

Modeling or concept modeling
Creating a digital or physical representation or sketch of an idea, usually for testing; prototyping

Movement
Principle of motion of diverse items within media artworks

Multimodal perception
The coordinated and synchronized integration of multiple sensory systems (vision, touch, auditory, etc.) in media artworks

Multimedia theatre
The combination of live theatre elements and digital media (sound, projections, video, etc.) into a unified production for a live audience

Narrative structure
The framework for a story, usually consisting of an arc of beginning, conflict and resolution

Personal aesthetic
An individually formed, idiosyncratic style or manner of expressing oneself; an artist's "voice"

Perspective

Principle pertaining to the method of three-dimensional rendering, point-of-view, and angle of composition

Point of view
The position from which something or someone is observed; the position of the narrator in relation to the story, as indicated by the narrator's outlook from which the events are depicted and by the attitude toward the characters

Positioning
The principle of placement or arrangement

Production processes
The diverse processes, procedures, or steps used to carry out the construction of a media artwork, such as prototyping, playtesting, and architecture construction in game design

Prototyping
Creating a testable version, sketch or model of a media artwork, such as a game, character, website, application, etc.

Resisting closure
Delaying completion of an idea, process or production, or persistently extending the process of refinement, towards greater creative solutions or technical perfection

Responsive use of failure
Incorporating errors towards persistent improvement of an idea, technique, process or product

Rules
The laws, or guidelines for appropriate behavior; protocols

Safety
Maintaining proper behavior for the welfare of self and others in handling equipment and interacting with media arts environments and groups

Soft skills
Diverse organizational and management skills, useful to employment, such as collaboration, planning, adaptability, communication, etc.

Stylistic convention
A common, familiar, or even “formulaic” presentation form, style, technique or construct, such as the use of tension building techniques in a suspense film, for example

Systemic Communications
Socially or technologically organized and higher-order media arts communications such as networked multimedia, television formats and broadcasts, “viral” videos, social multimedia (e.g. “vine” videos), remixes, transmedia, etc.

System(s)
The complex and diverse technological structures and contexts for media arts production, funding, distribution, viewing, and archiving

Technological

The mechanical aspects and contexts of media arts production, including hardware, software, networks, code, etc.

Tone
Principle of "color", "texture" or "feel" of a media arts element or component, as for sound, lighting, mood, sequence, etc.

Transdisciplinary production
Accessing multiple disciplines during the conception and production processes of media creation, and using new connections or ideas that emerge to inform the work

Transmedia production
Communicating a narrative and/or theme over multiple media platforms, while adapting the style and structure of each story component to the unique qualities of the platforms

Virtual channels
Network based presentation platforms such as: Youtube, Vimeo, Deviantart, etc.

Virtual worlds
Online, digital, or synthetic environments (e.g. Minecraft, Second Life)

Vocational
The workforce aspects and contexts of media arts

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Idaho Content Standards

English Language Arts/Literacy
&
Literacy in History/Social Studies, Science, and Technical Subjects

K-12

Table of Contents

Idaho Content Standards English Language Arts *& Literacy in History/Social Studies, Science, and Technical Subjects*

Idaho Content Standards describe what Idaho students should know and be able to do at each grade level in certain content areas. Content standards are reviewed by teams of Idaho educators on a rotating basis every six years to ascertain whether changes or revisions are indicated to ensure that the most current and effective standards form the foundational basis for instruction, which is the responsibility of each local public school district.

In 2015, Idaho's Content Standards in English Language Arts & Literacy were reviewed through a four month online review process. In December of 2015, Stake Holders from across Idaho came together to review all comments and suggestions submitted.

The committee then recommended changes to Idaho's English Language Arts (ELA)/Literacy Standards to best meet the needs of Idaho students and educators.

The Common Core State Standards for English Language Arts & Literacy in History/Social Studies, Science, and Technical Subjects ("the Standards") are the culmination of an extended, broad-based effort to fulfill the charge issued by the states to create the next generation of K–12 standards in order to help ensure that all students are college and career ready in literacy no later than the end of high school.

The present work, led by the Council of Chief State School Officers (CCSSO) and the National Governors Association (NGA), builds on the foundation laid by states in their decades-long work on crafting high-quality education standards. The Standards also draw on the most important international models as well as research and input from numerous sources, including state departments of education, scholars, assessment developers, professional organizations, educators from kindergarten through college, and parents, students, and other members of the public. In their design and content, refined through successive drafts and numerous rounds of feedback, the Standards represent a synthesis of the best elements of standards-related work to date and an important advance over that previous work.

As specified by CCSSO and NGA, the Standards are (1) research and evidence based, (2) aligned with college and work expectations, (3) rigorous, and (4) internationally benchmarked. A particular standard was included in the document only when the best available evidence indicated that its mastery was essential for college and career readiness in a twenty-first-century, globally competitive society. The Standards are intended to be a living work: as new and better evidence emerges, the Standards will be revised accordingly.

The Standards are an extension of a prior initiative led by CCSSO and NGA to develop College and Career Readiness (CCR) standards in reading, writing, speaking, listening, and language as well as in mathematics. The CCR Reading, Writing, and Speaking and Listening Standards, released in draft form in September 2009, serve, in revised form, as the backbone for the present document. Grade-specific K–12 standards in reading, writing, speaking, listening, and language translate the broad (and, for the earliest grades, seemingly distant) aims of the CCR standards into age- and attainment- appropriate terms.

The Standards set requirements not only for English language arts (ELA) but also for literacy in history/social studies, science, and technical subjects. Just as students must learn to read, write, speak, listen, and use language effectively in a variety of content areas, so too must the Standards specify the literacy skills and understandings required for college and career readiness in multiple disciplines. Literacy standards for grade 6 and above are predicated on teachers of ELA, history/social studies, science, and technical subjects using their content area expertise to help students meet the particular challenges of reading, writing, speaking, listening, and language in their respective fields. It is important to note that the 6–12 literacy standards in history/social studies, science, and technical subjects are not meant to replace content standards in those areas but rather to supplement them. States may incorporate these standards into their standards for those subjects or adopt them as content area literacy standards.

As a natural outgrowth of meeting the charge to define college and career readiness, the Standards also lay out a vision of what it means to be a literate person in the twenty-first century. Indeed, the skills and understandings students are expected to demonstrate have wide applicability outside the classroom or workplace. Students who meet the Standards readily undertake the close, attentive reading that is at the heart of understanding and enjoying complex works of literature. They habitually perform the critical reading necessary to pick carefully through the staggering amount of information available today in print and digitally. They actively seek the wide, deep, and thoughtful engagement with high-quality literary and informational texts that builds knowledge, enlarges experience, and broadens worldviews. They reflexively demonstrate the cogent reasoning and use of evidence that is essential to both private deliberation and responsible citizenship in a democratic republic. In short, students who meet the Standards develop the skills in reading, writing, speaking, and listening that are the foundation for any creative and purposeful expression in language. *June 2, 2010*

What is Not Covered by the Standards

The Standards should be recognized for what they are not as well as what they are. The most important intentional design limitations are as follows:

1. The Standards define what all students are expected to know and be able to do, not how teachers should teach. For instance, the use of play with young children is not specified by the Standards, but it is welcome as a valuable activity in its own right and as a way to help students meet the expectations in this document. Furthermore, while the Standards make references to some particular forms of content, including mythology, foundational U.S. documents, and Shakespeare, they do not—indeed, cannot—enumerate all or even most of the content that students should learn. The Standards must therefore be complemented by a well-developed, content-rich curriculum consistent with the expectations laid out in this document.

2. While the Standards focus on what is most essential, they do not describe all that can or should be taught. A great deal is left to the discretion of teachers and curriculum developers. The aim of the Standards is to articulate the fundamentals, not to set out an exhaustive list or a set of restrictions that limits what can be taught beyond what is specified herein.

3. The Standards do not define the nature of advanced work for students who meet the Standards prior to the end of high school. For those students, advanced work in such areas as literature, composition, language, and journalism should be available. This work should provide the next logical step up from the college and career readiness baseline established here.

4. The Standards set grade-specific standards but do not define the intervention methods or materials necessary to support students who are well below or well above grade-level expectations. No set of grade-specific standards can fully reflect the great variety in abilities, needs, learning rates, and achievement levels of students in any given classroom. However, the Standards do provide clear signposts along the way to the goal of college and career readiness for all students.

5. It is also beyond the scope of the Standards to define the full range of supports appropriate for English language learners and for students with special needs. At the same time, all students must have the opportunity to learn and meet the same high standards if they are to access the knowledge and skills necessary in their post–high school lives.

Each grade will include students who are still acquiring English. For those students, it is possible to meet the standards in reading, writing, speaking, and listening without displaying native-like control of conventions and vocabulary. The Standards should also be read as allowing for the widest possible range of students to participate fully from the outset and as permitting appropriate accommodations to ensure maximum participation of students with special education needs. For example, for students with disabilities *reading* should allow for the use of Braille, screen-reader technology, or other assistive devices, while *writing* should include the use of a scribe, computer, or speech-to-text technology. In a similar vein, *speaking* and *listening* should be interpreted broadly to include sign language.

6. While the ELA and content area literacy components described herein are critical to college and career readiness, they do not define the whole of such readiness. Students require a wide-ranging, rigorous academic preparation and, particularly in the early grades, attention to such matters as social, emotional, and physical development and approaches to learning. Similarly, the Standards define literacy expectations in history/social studies, science, and technical subjects, but literacy standards in other areas, such as mathematics and health education, modeled on those in this document are strongly encouraged to facilitate a comprehensive, schoolwide literacy program.

Students who are College and Career Ready in Reading, Writing, Speaking, Listening, and Language

The descriptions that follow are not standards themselves but instead offer a portrait of students who meet the standards set out in this document. As students advance through the grades and master the standards in reading, writing, speaking, listening, and language, they are able to exhibit with increasing fullness and regularity these capacities of the literate individual.

They demonstrate independence.

Students can, without significant scaffolding, comprehend and evaluate complex texts across a range of types and disciplines, and they can construct effective arguments and convey intricate or multifaceted information. Likewise, students are able independently to discern a speaker's key points, request clarification, and ask relevant questions. They build on others' ideas, articulate their own ideas, and confirm they have been understood. Without prompting, they demonstrate command of standard English and acquire and use a wide-ranging vocabulary. More broadly, they become self-directed learners, effectively seeking out and using resources to assist them, including teachers, peers, and print and digital reference materials.

They build strong content knowledge.

Students establish a base of knowledge across a wide range of subject matter by engaging with works of quality and substance. They become proficient in new areas through research and study. They read purposefully and listen attentively to gain both general knowledge and discipline-specific expertise. They refine and share their knowledge through writing and speaking.

They respond to the varying demands of audience, task, purpose, and discipline.

Students adapt their communication in relation to audience, task, purpose, and discipline. They set and adjust purpose for reading, writing, speaking, listening, and language use as warranted by the task. They appreciate nuances, such as how the composition of an audience should affect tone when speaking and how the connotations of words affect meaning. They also know that different disciplines call for different types of evidence (e.g., documentary evidence in history, experimental evidence in science).

They comprehend as well as critique.

Students are engaged and open-minded—but discerning—readers and listeners. They work diligently to understand precisely what an author or speaker is saying, but they also question an author's or speaker's assumptions and premises and assess the veracity of claims and the soundness of reasoning.

They value evidence.

Students cite specific evidence when offering an oral or written interpretation of a text. They use relevant evidence when supporting their own points in writing and speaking, making their reasoning clear to the reader or listener, and they constructively evaluate others' use of evidence.

They use technology and digital media strategically and capably.

Students employ technology thoughtfully to enhance their reading, writing, speaking, listening, and language use. They tailor their searches online to acquire useful information efficiently, and they integrate what they learn using technology with what they learn offline. They are familiar with the strengths and limitations of various technological tools and mediums and can select and use those best suited to their communication goals.

They come to understand other perspectives and cultures.

Students appreciate that the twenty-first-century classroom and workplace are settings in which people from often widely divergent cultures and who represent diverse experiences and perspectives must learn and work together. Students actively seek to understand other perspectives and cultures through reading and listening, and they are able to communicate effectively with people of varied backgrounds. They evaluate other points of view critically and constructively. Through reading great classic and contemporary works of literature representative of a variety of periods, cultures, and worldviews, students can vicariously inhabit worlds and have experiences much different than their own.

How to Read This Document

Overall Document Organization

The Standards comprise three main sections: a comprehensive K–5 section and two content area–specific sections for grades 6–12, one for ELA and one for history/social studies, science, and technical subjects. Three appendices accompany the main document.

Each section is divided into strands. K–5 and 6–12 ELA have Reading, Writing, Speaking and Listening, and Language strands; the 6–12 history/ social studies, science, and technical subjects section focuses on Reading and Writing. Each strand is headed by a strand-specific set of College and Career Readiness Anchor Standards that is identical across all grades and content areas.

Standards for each grade within K–8 and for grades 9–10 and 11–12 follow the CCR anchor standards in each strand. Each grade-specific standard (as these standards are collectively referred to) corresponds to the same-numbered CCR anchor standard. Put another way, each CCR anchor standard has an accompanying grade-specific standard translating the broader CCR statement into grade-appropriate end-of-year expectations.

Individual CCR anchor standards can be identified by their strand, CCR status, and number (R.CCR.6, for example). Individual grade-specific standards can be identified by their strand, grade, and number (or number and letter, where applicable), so that RI.4.3, for example, stands for Reading, Informational Text, grade 4, standard 3 and W.5.1a stands for Writing, grade 5, standard 1a. Strand designations can be found in brackets alongside the full strand title.

Who is responsible for which portion of the Standards

A single K–5 section lists standards for reading, writing, speaking, listening, and language across the curriculum, reflecting the fact that most or all of the instruction students in these grades receive comes from one teacher. Grades 6–12 are covered in two content area–specific sections, the first for the English language arts teacher and the second for teachers of history/social studies, science, and technical subjects. Each section uses the same CCR anchor standards but also includes grade-specific standards tuned to the literacy requirements of the particular discipline(s).

Key Features of the Standards

Reading: Text complexity and the growth of comprehension The Reading standards place equal emphasis on the sophistication of what students read and the skill with which they read. Standard 10 defines a grade-by-grade "staircase" of increasing text complexity that rises from beginning reading to the college and career readiness level.

Whatever they are reading, students must also show a steadily growing ability to discern more from and make fuller use of text, including making an increasing number of connections among ideas and between texts, considering a wider range of textual evidence, and becoming more sensitive to inconsistencies, ambiguities, and poor reasoning in texts.

Writing: Text types, responding to reading, and research

The Standards acknowledge the fact that whereas some writing skills, such as the ability to plan, revise, edit, and publish, are applicable to many types of writing, other skills are more properly defined in terms of specific writing types: arguments, informative/explanatory texts, and narratives. Standard 9 stresses the importance of the writing-reading connection by requiring students to draw upon and write about evidence from literary and informational texts. Because of the centrality of writing to most forms of inquiry, research standards are prominently included in this strand, though skills important to research are infused throughout the document.

Speaking and Listening: Flexible communication and collaboration

Including but not limited to skills necessary for formal presentations, the Speaking and Listening standards require students to develop a range of broadly useful oral communication and interpersonal skills. Students must learn to work together, express and listen carefully to ideas, integrate information from oral, visual, quantitative, and media sources, evaluate what they hear, use media and visual displays strategically to help achieve communicative purposes, and adapt speech to context and task.

Language: Conventions, effective use, and vocabulary

The Language standards include the essential "rules" of standard written and spoken English, but they also approach language as a matter of craft and informed choice among alternatives. The vocabulary standards focus on understanding words and phrases, their relationships, and their nuances and on acquiring new vocabulary, particularly general academic and domain-specific words and phrases.

Appendices A, B, and C

Appendix A contains supplementary material on reading, writing, speaking and listening, and language as well as a glossary of key terms. Appendix B consists of text exemplars illustrating the complexity, quality, and range of reading appropriate for various grade levels with accompanying sample performance tasks. Appendix C includes annotated samples demonstrating at least adequate performance in student writing at various grade levels.

How to Write the Idaho Content Standards for English Language Arts/Literacy & Literacy in History/Social Studies, Science, and Technical Subjects:

Full name of Standard (Grade Level Indicator)	Standard -Reading Literature -Reading Informational Text -Writing -Speaking and Listening	Grade level	Standard number	Standard sub category letter (if applicable)	How to write as Anchor Standard	Way to write for Grade Level Standard
					College &Career Readiness Anchor Standards (no grade level indicated)	
Reading Literature (K-12)	RL	6	3		CCRA.R.3	RL.6.3
Reading Informational Text (K-12)	RI	9-10	9		CCRA.R.9	RI.9-10.9
Reading Literacy in History/Social Studies (6-12)	RH	9-10	2		CCRA.R.2	RH.9-10.2
Reading Literacy in Science and Technical Subjects (6-12)	RST	11-12	9		CCRA.R.9	RST.11-12.9
Reading Foundational Skills (K-5)	RF	1	2	b	CCRA.R.1	RF.1.2.b
Writing (K-12)	W	7	9	b	CCRA.W.9	W.7.9.b
Writing Literacy in History/Social Studies, Science, and Technical Subjects (6-12)	WHST	11-12	2	e	CCRA.W.2	WHST.11-12.2.e
Speaking and Listening (K-12)	SL	8	1	c	CCRA.SL.1	SL.8.1.c
Language (K-12)	L	11-12	4	d	CCRA.L.4	L.11-12.4.d

When writing the anchor standards you write them as: College & Career Readiness Anchor Standard .Standard Strand. Standard Number	
i.e. **C**ollege **&** **C**areer **R**eadiness .**R**eading (both Reading Literature and Reading Informational Text are just **R**eading). Standard **1**	CCRA.R.1
i.e. **C**ollege **&** **C**areer **R**eadiness. **W**riting. Standard **9**	CCRA.W.9
When writing your grade level standard that you write them as: Standard. Grade Level. Standard. Standard Number. Sub category letter if applicable	
i.e. **S**peaking and **L**istening . **Eighth** Grade . Standard **1**. Sub category letter **c**	SL.8.1.c
i.e. **W**riting in **H**istory/Social Studies, **S**cience and **T**echnical Subjects . Eleventh - Twelfth Grade . Standard 2 . Sub category letter e	WHST.11-12.2.e
i.e. **R**eading **L**iterature . **Sixth** Grade . Standard **3**	RL.6.3
i.e. Reading Informational Text . Grades **Nine** – **Ten** . Standard **9**	RI.9-10.9

IDAHO
STATE DEPARTMENT OF EDUCATION

Idaho Content Standards

English Language Arts/Literacy
&
Literacy in History/Social Studies, Science, and Technical Subjects

K-5 Section

College and Career Readiness Anchor Standards for Reading

The K–5 standards on the following pages define what students should understand and be able to do by the end of each grade. They correspond to the College and Career Readiness (CCR) anchor standards below by number. The CCR and grade-specific standards are necessary complements—the former providing broad standards, the latter providing additional specificity—that together define the skills and understandings that all students must demonstrate.

Key Ideas and details

CCRA.R.1 Read closely to determine what the text says explicitly and to make logical inferences from it; cite specific textual evidence when writing or speaking to support conclusions drawn from the text.

CCRA.R.2 Determine central ideas or themes of a text and analyze their development; summarize the key supporting details and ideas.

CCRA.R.3 Analyze how and why individuals, events, and ideas develop and interact over the course of a text.

Craft and Structure

CCRA.R.4 Interpret words and phrases as they are used in a text, including determining technical, connotative, and figurative meanings, and analyze how specific word choices shape meaning or tone.

CCRA.R.5 Analyze the structure of texts, including how specific sentences, paragraphs, and larger portions of the text (e.g., a section, chapter, scene, or stanza) relate to each other and the whole.

CCRA.R.6 Assess how point of view or purpose shapes the content and style of a text.

Integration of Knowledge and Ideas

CCRA.R.7 Integrate and evaluate content presented in diverse media and formats, including visually and quantitatively, as well as in words.*

CCRA.R.8 Delineate and evaluate the argument and specific claims in a text, including the validity of the reasoning as well as the relevance and sufficiency of the evidence.

CCRA.R.9 Analyze how two or more texts address similar themes or topics in order to build knowledge or to compare the approaches the authors take.

Range of Reading and Level of Text Complexity

CCRA.R.10 Read and comprehend complex literary and informational texts independently and proficiently.

**Please see "Research to Build and Present Knowledge" in Writing and "Comprehension and Collaboration" in Speaking and Listening for additional standards relevant to gathering, assessing, and applying information from print and digital sources.*

Note on range and content of student reading

To build a foundation for college and career readiness, students must read widely and deeply from among a broad range of high-quality, increasingly challenging literary and informational texts. Through extensive reading of stories, dramas, poems, and myths from diverse cultures and different time periods, students gain literary and cultural knowledge as well as familiarity with various text structures and elements. By reading texts in history/social studies, science, and other disciplines, students build a foundation of knowledge in these fields that will also give them the background to be better readers in all content areas. Students can only gain this foundation when the curriculum is intentionally and coherently structured to develop rich content knowledge within and across grades. Students also acquire the habits of reading independently and closely, which are essential to their future success.

Reading Standards for Literature (K–5) RL

The following standards offer a focus for instruction each year and help ensure that students gain adequate exposure to a range of texts and tasks. Rigor is also infused through the requirement that students read increasingly complex texts through the grades. *Students advancing through the grades are expected to meet each year's grade-specific standards and retain or further develop skills and understandings mastered in preceding grades.*

Kindergartners:	Grade 1 Students:	Grade 2 Students:
Key Ideas and Details		
RL.K.1 With prompting and support, ask and answer questions about key details in a text.	**RL.1.1** Ask and answer questions about key details in a text.	**RL.2.1** Ask and answer such questions as who, what, where, when, why, and how to demonstrate understanding of key details in a text.
RL.K.2 With prompting and support, retell familiar stories, including key details.	**RL.1.2** Retell stories, including key details, and demonstrate understanding of their central message or lesson.	**RL.2.2** Recount stories, including fables and folktales from diverse cultures, and determine their central message, lesson, or moral.
RL.K.3 With prompting and support, identify characters, settings, and major events in a story.	**RL.1.3** Describe characters, settings, and major events in a story, using key details.	**RL.2.3** Describe how characters in a story respond to major events and challenges.
Craft and Structure		
RL.K.4 Ask and answer questions about unknown words in a text.	**RL.1.4** Identify words and phrases in stories or poems that suggest feelings or appeal to the senses.	**RL.2.4** With guidance and support from adults, identify and ~~Describe~~ describe how words and phrases (e.g., regular beats, alliteration, rhymes, repeated lines) supply rhythm and meaning in a story, poem, or song.
RL.K.5 Recognize common types of texts (e.g., storybooks, poems).	**RL.1.5** Explain major differences between books that tell stories and books that give information, drawing on a wide reading of a range of text types.	**RL.2.5** Describe the overall structure of a story, including describing how the beginning introduces the story and the ending concludes the action.
RL.K.6 With prompting and support, name the author and illustrator of a story and define the role of each in telling the story.	**RL.1.6** Identify who is telling the story at various points in a text.	**RL.2.6** Acknowledge differences in the points of view of characters, including by speaking in a different voice for each character when reading dialogue aloud.
Integration of Knowledge and Ideas		
RL.K.7 With prompting and support, describe the relationship between illustrations and the story in which they appear (e.g., what moment in a story an illustration depicts).	**RL.1.7** Use illustrations and details in a story to describe its characters, setting, or events.	**RL.2.7** Use information gained from the illustrations and words in a print or digital text to demonstrate understanding of its characters, setting, or plot.
RL.K.8 (Not applicable to literature)	**RL.1.8** (Not applicable to literature)	**RL.2.8** (Not applicable to literature)
RL.K.9 With prompting and support, compare and contrast the adventures and experiences of characters in familiar stories.	**RL.1.9** Compare and contrast the adventures and experiences of characters in stories.	RL.2.9 Compare and contrast two or more versions of the same story (e.g., Cinderella stories) by different authors or from different cultures.
Range of Reading and Level of Text Complexity		
RL.K.10 Actively engage in group reading activities with purpose and understanding.	**RL.1.10** With prompting and support, read prose and poetry of appropriate complexity for grade 1.	**RL.2.10** By the end of the year, read and comprehend literature, including stories and poetry, in the grades 2–3 text complexity band proficiently, with scaffolding as needed at the high end of the range.

Reading Standards for Literature (K–5) RL

Grade 3 Students:	Grade 4 Students:	Grade 5 Students:
Key Ideas and Details		
RL.3.1 Ask and answer questions to demonstrate understanding of a text, referring explicitly to the text as the basis for the answers.	**RL.4.1** Refer to details and examples in a text when explaining what the text says explicitly and when drawing inferences from the text.	**RL.5.1** Quote accurately from a text when explaining what the text says explicitly and when drawing inferences from the text.
RL.3.2 Recount stories, including fables, folktales, and myths from diverse cultures; determine the central message, lesson, or moral and explain how it is conveyed through key details in the text.	**RL.4.2** Determine a theme of a story, drama, or poem from details in the text; summarize the text.	**RL.5.2** Determine a theme of a story, drama, or poem from details in the text, including how characters in a story or drama respond to challenges or how the speaker in a poem reflects upon a topic; summarize the text.
RL.3.3 Describe characters in a story (e.g., their traits, motivations, or feelings) and explain how their actions contribute to the sequence of events.	**RL.4.3** Describe in depth a character, setting, or event in a story or drama, drawing on specific details in the text (e.g., a character's thoughts, words, or actions).	**RL.5.3** Compare and contrast two or more characters, settings, or events in a story or drama, drawing on specific details in the text (e.g., how characters interact).
Craft and Structure		
RL.3.4 Determine the meaning of words and phrases as they are used in a text, distinguishing literal from nonliteral language.	**RL.4.4** Determine the meaning of words and phrases as they are used in a text, including those that allude to significant characters found in mythology (e.g., Herculean).	**RL.5.4** Determine the meaning of words and phrases as they are used in a text, including figurative language such as metaphors and similes.
RL.3.5 Refer to parts of stories, dramas, and poems when writing or speaking about a text, using terms such as chapter, scene, and stanza; describe how each successive part builds on earlier sections.	**RL.4.5** Explain major differences between poems, drama, and prose, and refer to the structural elements of poems (e.g., verse, rhythm, meter) and drama (e.g., casts of characters, settings, descriptions, dialogue, stage directions) when writing or speaking about a text.	**RL.5.5** Explain how a series of chapters, scenes, or stanzas fits together to provide the overall structure of a particular story, drama, or poem.
RL.3.6 Distinguish their own point of view from that of the narrator or those of the characters.	**RL.4.6** Compare and contrast the point of view from which different stories are narrated, including the difference between first- and third-person narrations.	**RL.5.6** Describe how a narrator's or speaker's point of view influences how events are described.
Integration of Knowledge and Ideas		
RL.3.7 Explain how specific aspects of a text's illustrations contribute to what is conveyed by the words in a story (e.g., create mood, emphasize aspects of a character or setting).	**RL.4.7** Make connections between the text of a story or drama and a visual or oral presentation of the text, identifying where each version reflects specific descriptions and directions in the text.	**RL.5.7** Analyze how visual and multimedia elements contribute to the meaning, tone, or beauty of a text (e.g., graphic novel, multimedia presentation of fiction, folktale, myth, poem).
RL.3.8 (Not applicable to literature)	**RL.4.8** (Not applicable to literature)	**RL.5.8** (Not applicable to literature)
RL.3.9 Compare and contrast the themes, settings, and plots of stories written by the same author about the same or similar characters (e.g., in books from a series).	**RL.4.9** Compare and contrast the treatment of similar themes and topics (e.g., opposition of good and evil) and patterns of events (e.g., the quest) in stories, myths, and traditional literature from different cultures.	**RL.5.9** Compare and contrast stories in the same genre (e.g., mysteries and adventure stories) on their approaches to similar themes and topics.
Range of Reading and Level of Text Complexity		
RL.3.10 By the end of the year, read and comprehend literature, including stories, dramas, and poetry, at the high end of the grades 2–3 text complexity band independently and proficiently.	**RL.4.10** By the end of the year, read and comprehend literature, including stories, dramas, and poetry, in the grades 4–5 text complexity band proficiently, with scaffolding as needed at the high end of the range.	**RL.5.10** By the end of the year, read and comprehend literature, including stories, dramas, and poetry, at the high end of the grades 4–5 text complexity band independently and proficiently.

Reading Standards for Informational Text (K–5) RI

Kindergartners:	Grade 1 Students:	Grade 2 Students:
Key Ideas and Details		
RI.K.1 With prompting and support, ask and answer questions about key details in a text.	**RI.1.1** Ask and answer questions about key details in a text.	**RI.2.1** Ask and answer questions as who, what, where, when, why, and how, to demonstrate understanding of key details in a text.
RI.K.2 With prompting and support, identify the main topic and retell key details of a text.	**RI.1.2** Identify the main topic and retell key details of a text.	**RI.2.2** Identify the main topic of a multiparagraph text as well as the focus of specific paragraphs within the text.
RI.K.3 With prompting and support, describe the connection between two individuals, events, ideas, or pieces of information in a text.	**RI.1.3** Describe the connection between two individuals, events, ideas, or pieces of information in a text.	**RI.2.3** Describe the connection between a series of historical events, scientific ideas or concepts, or steps in technical procedures in a text.
Craft and Structure		
RI.K.4 With prompting and support, ask and answer questions about unknown words in a text.	**RI.1.4** Ask and answer questions to help determine or clarify the meaning of words and phrases in a text.	**RI.2.4** Determine the meaning of words and phrases in a text relevant to a *grade 2 topic or subject area*.
RI.K.5 Identify the front cover, back cover, and title page of a book.	**RI.1.5** Know and use various text features (e.g., headings, tables of contents, glossaries, electronic menus, icons) to locate key facts or information in a text.	**RI.2.5** Know and use various text features (e.g., captions, bold print, subheadings, glossaries, indexes, electronic menus, icons) to locate key facts or information in a text efficiently.
RI.K.6 Name the author and illustrator of a text and define the role of each in presenting the ideas or information in a text.	**RI.1.6** Distinguish between information provided by pictures or other illustrations and information provided by the words in a text.	**RI.2.6** Identify the main purpose of a text, including what the author wants to answer, explain, or describe.
Integration of Knowledge and Ideas		
RI.K.7 With prompting and support, describe the relationship between illustrations and the text in which they appear (e.g., what person, place, thing, or idea in the text an illustration depicts).	**RI.1.7** Use the illustrations and details in a text to describe its key ideas.	**RI.2.7** Explain how specific images (e.g., a diagram showing how a machine works) contribute to and clarify a text.
RI.K.8 With prompting and support, identify the reasons an author gives to support points in a text.	**RI.1.8** Identify the reasons an author gives to support points in a text.	**RI.2.8** Describe how reasons support specific points the author makes in a text.
RI.K.9 With prompting and support, identify basic similarities in and differences between two texts on the same topic (e.g., in illustrations, descriptions, or procedures).	**RI.1.9** Identify basic similarities in and differences between two texts on the same topic (e.g., in illustrations, descriptions, or procedures).	**RI.2.9** Compare and contrast the most important points presented by two texts on the same topic.
Range of Reading and Level of Text Complexity		
RI.K.10 Actively engage in group reading activities with purpose and understanding.	**RI.1.10** With prompting and support, read informational texts appropriately complex for grade 1.	**RI.2.10** By the end of the year, read and comprehend informational texts, including history/social studies, science, and technical texts, in the grades 2-3 text complexity band proficiently, with scaffolding as needed at the high end of the range.

Reading Standards for Informational Text (K–5) RI

Grade 3 Students:	Grade 4 Students:	Grade 5 Students:
Key Ideas and Details		
RI.3.1 Ask and answer questions to demonstrate understanding of a text, referring explicitly to the text as the basis for the answers.	**RI.4.1** Refer to details and examples in a text when explaining what the text says explicitly and when drawing inferences from the text.	**RI.5.1**Quote accurately from a text when explaining what the text says explicitly and when drawing inferences from the text.
RI.3.2 Determine the main idea of a text; recount the key details and explain how they support the main idea.	**RI.4.2** Determine the main idea of a text and explain how it is supported by key details; summarize the text.	**RI.5.2** Determine two or more main ideas of a text and explain how they are supported by key details; summarize the text.
RI.3.3 Describe the relationship between a series of historical events, scientific ideas or concepts, or steps in technical procedures in a text, using language that pertains to time, sequence, and cause/effect.	**RI.4.3** Explain events, procedures, ideas, or concepts in a historical, scientific, or technical text, including what happened and why, based on specific information in the text.	**RI.5.3** Explain the relationships or interactions between two or more individuals, events, ideas, or concepts in a historical, scientific, or technical text based on specific information in the text.
Craft and Structure		
RI.3.4 Determine the meaning of general academic and domain-specific words and phrases in a text relevant to a grade 3 topic or subject area.	**RI.4.4** Determine the meaning of general academic and domain-specific words or phrases in a text relevant to a grade 4 topic or subject area.	**RI.5.4** Determine the meaning of general academic and domain-specific words and phrases in a text relevant to a grade 5 topic or subject area.
RI.3.5 Use text features and search tools (e.g., key words, sidebars, hyperlinks) to locate information relevant to a given topic efficiently.	**RI.4.5** Describe the overall structure (e.g., chronology, comparison, cause/effect, problem/solution) of events, ideas, concepts, or information in a text or part of a text.	**RI.5.5** Compare and contrast the overall structure (e.g., chronology, comparison, cause/effect, problem/solution) of events, ideas, concepts, or information in two or more texts.
RI.3.6 Distinguish their own point of view from that of the author of a text.	**RI.4.6** Compare and contrast a firsthand and secondhand account of the same event or topic; describe the differences in focus and the information provided.	**RI.5.6** Analyze multiple accounts of the same event or topic, noting important similarities and differences in the point of view they represent.
Integration of Knowledge and Ideas		
RI.3.7 Use information gained from illustrations (e.g., maps, photographs) and the words in a text to demonstrate understanding of the text (e.g., where, when, why, and how key events occur).	**RI.4.7** Interpret information presented visually, orally, or quantitatively (e.g., in charts, graphs, diagrams, time lines, animations, or interactive elements on Web pages) and explain how the information contributes to an understanding of the text in which it appears.	**RI.5.7** Draw on information from multiple print or digital sources, demonstrating the ability to locate an answer to a question quickly or to solve a problem efficiently.
RI.3.8 Describe the logical connection between particular sentences and paragraphs in a text (e.g., comparison, cause/effect, first/second/third in a sequence).	**RI.4.8** Explain how an author uses reasons and evidence to support particular points in a text.	**RI.5.8** Explain how an author uses reasons and evidence to support particular points in a text, identifying which reasons and evidence support which point(s).
RI.3.9 Compare and contrast the most important points and key details presented in two texts on the same topic.	**RI.4.9** Integrate information from two texts on the same topic in order to write or speak about the subject knowledgeably.	**RI.5.9** Integrate information from several texts on the same topic in order to write or speak about the subject knowledgeably.
Range of Reading and Level of Text Complexity		
RI.3.10 By the end of the year, read and comprehend informational texts, including history/social studies, science, and technical texts, at the high end of the grades 2–3 text complexity band independently and proficiently.	**RI.4.10** By the end of year, read and comprehend informational texts, including history/social studies, science, and technical texts, in the grades 4–5 text complexity band proficiently, with scaffolding as needed at the high end of the range.	**RI.5.10** By the end of the year, read and comprehend informational texts, including history/social studies, science, and technical texts, at the high end of the grades 4–5 text complexity band independently and proficiently.

Reading Standards for Foundational Skills (K–5) No Anchor Standards for Foundational Skills RF

These standards are directed toward fostering students' understanding and working knowledge of concepts of print, the alphabetic principle, and other basic conventions of the English writing system. These foundational skills are not an end in and of themselves; rather, they are necessary and important components of an effective, comprehensive reading program designed to develop proficient readers with the capacity to comprehend texts across a range of types and disciplines. Instruction should be differentiated: good readers will need much less practice with these concepts than struggling readers will. The point is to teach students what they need to learn and not what they already know – to discern when particular children or activities warrant more or less attention.

Note: in kindergarten children are expected to demonstrate increasing awareness and competence in the areas that follow.

Kindergarteners:	Grade 1 Students:	Grade 2 Students:
Print Concepts		
RF.K.1 Demonstrate understanding of the organization and basic features of print. a. Follow words from left to right, top to bottom, and page by page. b. Recognize that spoken words are represented in written language by specific sequences of letters. c. Understand that words are separated by spaces in print. d. d. Recognize and name all upper- and lowercase letters of the alphabet.	**RF.1.1** Demonstrate understanding of the organization and basic features of print. a. a. Recognize the distinguishing features of a sentence (e.g., first word, capitalization, ending punctuation).	N/A
Phonological Awareness		
RF.K.2 Demonstrate understanding of spoken words, syllables, and sounds (phonemes). a. Recognize and produce rhyming words. b. Count, pronounce, blend, and segment syllables in spoken words. c. Blend and segment onsets and rimes of single-syllable spoken words. d. Isolate and pronounce the initial, medial vowel, and final sounds (phonemes) in three-phoneme (consonant-vowel-consonant, or CVC) words.1 (This does not include CVCs ending with /l/, /r/, or /x/.) e. e. Add or substitute individual sounds (phonemes) in simple, one-syllable words to make new words.	**RF.1.2** Demonstrate understanding of spoken words, syllables, and sounds (phonemes). a. Distinguish long from short vowel sounds in spoken single-syllable words. b. Orally produce single-syllable words by blending sounds (phonemes), including consonant blends. c. Isolate and pronounce initial, medial vowel, and final sounds (phonemes) in spoken single-syllable words. d. d. Segment spoken single-syllable words into their complete sequence of individual sounds (phonemes).	N/A

Reading Standards for Foundational Skills (K–5) No Anchor Standards for Foundational Skills RF

Note: in kindergarten children are expected to demonstrate increasing awareness and competence in the areas that follow.

Kindergarteners:	Grade 1 Students:	Grade 2 Students:
Phonics and Word Recognition		
RF.K.3 Know and apply grade-level phonics and word analysis skills in decoding words. a. Demonstrate basic knowledge of letter-sound correspondences by producing the primary or most frequent sound for each consonant. b. Associate the long and short sounds with the common spellings (graphemes) for the five major vowels. c. Read common high-frequency words by sight (e.g., the, of, to, you, she, my, is, are, do, does). d. d. Distinguish between similarly spelled words by identifying the sounds of the letters that differ.	**RF.1.3** Know and apply grade-level phonics and word analysis skills in decoding words. a. Know the spelling-sound correspondences for common consonant digraphs (two letters that represent one sound). b. Decode regularly spelled one-syllable words. c. Know final -e and common vowel team conventions for representing long vowel sounds. d. Use knowledge that every syllable must have a vowel sound to determine the number of syllables in a printed word. e. Decode two-syllable words following basic patterns by breaking the words into syllables. f. Read words with inflectional endings. g. Recognize and read grade-appropriate irregularly spelled words.	**RF.2.3** Know and apply grade-level phonics and word analysis skills in decoding words. a. Identify and know the meaning of the most common prefixes and derivational suffixes. b. Decode words with common Latin suffixes. c. Decode multi-syllable words. d. d. Read grade-appropriate irregularly spelled words.
Fluency		
RF.K.4 Read emergent-reader texts with purpose and understanding.	**RF.1.4** Read with sufficient accuracy and fluency to support comprehension. a. Read grade-level text with purpose and understanding. b. Read grade-level text orally with accuracy, appropriate rate, and expression. c. c. Use context to confirm or self-correct word recognition and understanding, rereading as necessary.	**RF.2.4** Read with sufficient accuracy and fluency to support comprehension. a. Read grade-level text with purpose and understanding. b. Read grade-level prose and poetry orally with accuracy, appropriate rate, and expression. c. c. Use context to confirm or self-correct word recognition and understanding, rereading as necessary.

Reading Standards for Foundational Skills (K–5) No Anchor Standards for Foundational Skills RF

Grade 3 Students:	Grade 4 Students:	Grade 5 Students:
Print Concepts		
In Kindergarten and First grade	In Kindergarten and First grade	In Kindergarten and First grade
Phonological Awareness		
In Kindergarten and First grade	In Kindergarten and First grade	In Kindergarten and First grade
Phonics and Word Recognition		
RF.3.3 Know and apply grade-level phonics and word analysis skills in decoding words. a. Identify and know the meaning of the most common prefixes and derivational suffixes. b. Decode words with common Latin suffixes. c. Decode multi-syllable words. d. Read grade-appropriate irregularly spelled words.	**RF.4.3** Know and apply grade-level phonics and word analysis skills in decoding words. a. Use combined knowledge of all letter-sound correspondences, syllabication patterns, and morphology (e.g., roots and affixes) to read accurately unfamiliar multisyllabic words in context and out of context.	**RF.5.3** Know and apply grade-level phonics and word analysis skills in decoding words. a. Use combined knowledge of all letter-sound correspondences, syllabication patterns, and morphology (e.g., roots and affixes) to read accurately unfamiliar multisyllabic words in context and out of context.
Fluency		
RF.3.4 Read with sufficient accuracy and fluency to support comprehension. a. Read grade-level text with purpose and understanding. b. Read grade-level prose and poetry orally with accuracy, appropriate rate, and expression. c. c. Use context to confirm or self-correct word recognition and understanding, rereading as necessary.	**RF.4.4** Read with sufficient accuracy and fluency to support comprehension. a. Read grade-level text with purpose and understanding. b. Read grade-level prose and poetry orally with accuracy, appropriate rate, and expression. c. c. Use context to confirm or self-correct word recognition and understanding, rereading as necessary.	**RF.5.4** Read with sufficient accuracy and fluency to support comprehension. a. Read grade-level text with purpose and understanding. b. Read grade-level prose and poetry orally with accuracy, appropriate rate, and expression. c. c. Use context to confirm or self-correct word recognition and understanding, rereading as necessary.

College and Career Readiness Anchor Standards for Writing

The K–5 standards on the following pages define what students should understand and be able to do by the end of each grade. They correspond to the College and Career Readiness (CCR) anchor standards below by number. The CCR and grade-specific standards are necessary complements—the former providing broad standards, the latter providing additional specificity—that together define the skills and understandings that all students must demonstrate.

Text Types and Purposes*

CCRA.W.1 Write arguments to support claims in an analysis of substantive topics or texts, using valid reasoning and relevant and sufficient evidence.

CCRA.W.2 Write informative/explanatory texts to examine and convey complex ideas and information clearly and accurately through the effective selection, organization, and analysis of content.

CCRA.W.3 Write narratives to develop real or imagined experiences or events using effective technique, well-chosen details, and well-structured event sequences.

Production and Distribution of Writing

CCRA.W.4 Produce clear and coherent writing in which the development, organization, and style are appropriate to task, purpose, and audience.

CCRA.W.5 Write informative/explanatory texts to examine and convey complex ideas and information clearly and accurately through the effective selection, organization, and analysis of content.

CCRA.W.6 Use technology, including the Internet, to produce and publish writing and to interact and collaborate with others.

Research to Build and Present Knowledge

CCRA.W.7 Conduct short as well as more sustained research projects based on focused questions, demonstrating understanding of the subject under investigation.

CCRA.W.8 Gather relevant information from multiple print and digital sources, assess the credibility and accuracy of each source, and integrate the information while avoiding plagiarism.

CCRA.W.9 Draw evidence from literary or informational texts to support analysis, reflection, and research.

Range of Writing

CCRA.W.10 Write routinely over extended time frames (time for research, reflection, and revision) and shorter time frames (a single sitting or a day or two) for a range of tasks, purposes, and audiences

***These broad types of writing include many subgenres. See Appendix A for definitions of key writing types.*

Note on range and content of student writing

To build a foundation for college and career readiness, students need to learn to use writing as a way of offering and supporting opinions, demonstrating understanding of the subjects they are studying, and conveying real and imagined experiences and events. They learn to appreciate that a key purpose of writing is to communicate clearly to an external, sometimes unfamiliar audience, and they begin to adapt the form and content of their writing to accomplish a particular task and purpose. They develop the capacity to build knowledge on a subject through research projects and to respond analytically to literary and informational sources. To meet these goals, students must devote significant time and effort to writing, producing numerous pieces over short and extended time frames throughout the year.

Writing Standards K–5 W

The following standards for K–5 offer a focus for instruction each year to help ensure that students gain adequate mastery of a range of skills and applications. Each year in their writing, students should demonstrate increasing sophistication in all aspects of language use, from vocabulary and syntax to the development and organization of ideas, and they should address increasingly demanding content and sources. *Students advancing through the grades are expected to meet each year's grade-specific standards and retain or further develop skills and understandings mastered in preceding grades.* The expected growth in student writing ability is reflected both in the standards themselves and in the collection of annotated student writing samples in Appendix C.

Kindergartners:	Grade 1 Students:	Grade 2 Students:
Text Types and Purposes		
W.K.1 Use a combination of drawing, dictating, and writing to compose opinion pieces in which they tell a reader the topic or the name of the book they are writing about and state an opinion or preference about the topic or book (e.g., My favorite book is . . .).	**W.1.1**Write opinion pieces in which they introduce the topic or name the book they are writing about, state an opinion, supply a reason for the opinion, and provide some sense of closure.	**W.2.1** Write opinion pieces in which they introduce the topic or book they are writing about, state an opinion, supply reasons that support the opinion, use linking words (e.g., because, and, also) to connect opinion and reasons, and provide a concluding statement or section.
W.K.2 Use a combination of drawing, dictating, and writing to compose informative/explanatory texts in which they name what they are writing about and supply some information about the topic.	**W.1.2** Write informative/explanatory texts in which they name a topic, supply some facts about the topic, and provide some sense of closure.	**W.2.2** Write informative/explanatory texts in which they introduce a topic, use facts and definitions to develop points, and provide a concluding statement or section.
W.K.3 Use a combination of drawing, dictating, and writing to narrate a single event or several loosely linked events, tell about the events in the order in which they occurred, and provide a reaction to what happened.	**W.1.3** Write narratives in which they recount two or more appropriately sequenced events, include some details regarding what happened, use temporal words to signal event order, and provide some sense of closure.	**W.2.3** Write narratives in which they recount a well-elaborated event or short sequence of events, include details to describe actions, thoughts, and feelings, use temporal words to signal event order, and provide a sense of closure.
Production and Distribution of Writing		
W.K.4. (Begins in grade 3)	**W.1.4** (Begins in grade 3)	**W.2.4** (Begins in grade 3)
W.K.5 With guidance and support from adults, respond to questions and suggestions from peers and add details to strengthen writing as needed.	**W.1.5** With guidance and support from adults, focus on a topic, respond to questions and suggestions from peers, and add details to strengthen writing as needed.	**W.2.5** With guidance and support from adults and peers, focus on a topic and strengthen writing as needed by revising and editing.
W.K.6 With guidance and support from adults, explore a variety of digital tools to produce and publish writing, including in collaboration with peers.	**W.1.6** With guidance and support from adults, use a variety of digital tools to produce and publish writing, including in collaboration with peers.	**W.2.6** With guidance and support from adults, use technology ~~a variety of digital tools~~ to produce and publish writing, (using keyboarding skills) as well as to interact and collaborate with others. ~~including in collaboration with peers.~~
Research to Build and Present Knowledge		
W.K.7 Participate in shared research and writing projects (e.g., explore a number of books by a favorite author and express opinions about them).	**W.1.7** Participate in shared research and writing projects (e.g., explore a number of "how-to" books on a given topic and use them to write a sequence of instructions).	**W.2.7** Participate in shared research and writing projects (e.g., read a number of books on a single topic to produce a report; record science observations).
W.K.8. With guidance and support from adults, recall information from experiences or gather information from provided sources to answer a question.	**W.1.8** With guidance and support from adults, recall information from experiences or gather information from provided sources to answer a question.	**W.2.8** Recall information from experiences or gather information from provided sources to answer a question.
W.K.9 (Begins in grade 4)	**W.1.9** (Begins in grade 4)	**W.2.9** (Begins in grade 4)
Range of Writing		
W.K.10 (Begins in grade 3)	**W.1.10** (Begins in grade 3)	**W.2.10** (Begins in grade 3)

Writing Standards K–5 W

Grade 3 Students:	Grade 4 Students:	Grade 5 Students:
Text Types and Purposes		
W.3.1 Write opinion pieces on topics or texts, supporting a point of view with reasons. a. Introduce the topic or text they are writing about, state an opinion, and create an organizational structure that lists reasons. b. Provide reasons that support the opinion. c. Use linking words and phrases (e.g., because, therefore, since, for example) to connect opinion and reasons. d. Provide a concluding statement or section.	**W.4.1** Write opinion pieces on topics or texts, supporting a point of view with reasons and information. a. Introduce a topic or text clearly, state an opinion, and create an organizational structure in which related ideas are grouped to support the writer's purpose. b. Provide reasons that are supported by facts and details. c. Link opinion and reasons using words and phrases (e.g., for instance, in order to, in addition). d. Use precise language and domain-specific vocabulary to support the opinion piece. ~~d.~~e. Provide a concluding statement or section related to the opinion presented.	**W.5.1** Write opinion pieces on topics or texts, supporting a point of view with reasons and information. a. Introduce a topic or text clearly, state an opinion, and create an organizational structure in which ideas are logically grouped to support the writer's purpose. b. Provide logically ordered reasons that are supported by facts and details. c. Link opinion and reasons using words, phrases, and clauses (e.g., consequently, specifically). d. Use precise language and domain-specific vocabulary to support the opinion piece. ~~d.~~e. Provide a concluding statement or section related to the opinion presented.
W.3.2 Write informative/explanatory texts to examine a topic and convey ideas and information clearly. a. Introduce a topic and group related information together; include illustrations when useful to aiding comprehension. b. Develop the topic with facts, definitions, and details. c. Use linking words and phrases (e.g., also, another, and, more, but) to connect ideas within categories of information. d. Provide a concluding statement or section.	**W.4.2** Write informative/explanatory texts to examine a topic and convey ideas and information clearly. a. Introduce a topic clearly and group related information in paragraphs and sections; include formatting (e.g., headings), illustrations, and multimedia when useful to aiding comprehension. b. Develop the topic with facts, definitions, concrete details, quotations, or other information and examples related to the topic. c. Link ideas within categories of information using words and phrases (e.g., another, for example, also, because). d. Use precise language and domain-specific vocabulary to inform about or explain the topic e. Provide a concluding statement or section related to the information or explanation presented.	**W.5.2** Write informative/explanatory texts to examine a topic and convey ideas and information clearly. a. Introduce a topic clearly, provide a general observation and focus, and group related information logically; include formatting (e.g., headings), illustrations, and multimedia when useful to aiding comprehension. b. Develop the topic with facts, definitions, concrete details, quotations, or other information and examples related to the topic. c. Link ideas within and across categories of information using words, phrases, and clauses (e.g., in contrast, especially). d. Use precise language and domain-specific vocabulary to inform about or explain the topic. e. Provide a concluding statement or section related to the information or explanation presented.
W.3.3 Write narratives to develop real or imagined experiences or events using effective technique, descriptive details, and clear event sequences. a. Establish a situation and introduce a narrator and/or characters; organize an event sequence that unfolds naturally. b. Use dialogue and descriptions of actions, thoughts, and feelings to develop experiences and events or show the response of characters to situations. c. Use temporal words and phrases to signal event order. d. Provide a sense of closure.	**W.4.3** Write narratives to develop real or imagined experiences or events using effective technique, descriptive details, and clear event sequences. a. Orient the reader by establishing a situation and introducing a narrator and/or characters; organize an event sequence that unfolds naturally. b. Use dialogue and description to develop experiences and events or show the responses of characters to situations. c. Use a variety of transitional words and phrases to manage the sequence of events. d. Use concrete words and phrases and sensory details to convey experiences and events precisely.	**W.5.3** Write narratives to develop real or imagined experiences or events using effective technique, descriptive details, and clear event sequences. a. Orient the reader by establishing a situation and introducing a narrator and/or characters; organize an event sequence that unfolds naturally. b. Use narrative techniques, such as dialogue, description, and pacing, to develop experiences and events or show the responses of characters to situations. c. Use a variety of transitional words, phrases, and clauses to manage the sequence of events. d. Use concrete words and phrases and sensory details

	e. Provide a conclusion that follows from the narrated experiences or events.	to convey experiences and events precisely. e. Provide a conclusion that follows from the narrated experiences or events.
Production and Distribution of Writing		
W.3.4 With guidance and support from adults, produce writing in which the development and organization are appropriate to task and purpose. (Grade-specific expectations for writing types are defined in standards 1–3 above.)	**W.4.4** Produce clear and coherent writing in which the development and organization are appropriate to task, purpose, and audience. (Grade-specific expectations for writing types are defined in standards 1–3 above.)	**W.5.4** Produce clear and coherent writing in which the development and organization are appropriate to task, purpose, and audience. (Grade-specific expectations for writing types are defined in standards 1–3 above.)
W.3.5 With guidance and support from peers and adults, develop and strengthen writing as needed by planning, revising, and editing. (Editing for conventions should demonstrate command of Language standards 1–3 up to and including grade 39.)	**W.4.5** With guidance and support from peers and adults, develop and strengthen writing as needed by planning, revising, and editing. (Editing for conventions should demonstrate command of Language standards 1–3 up to and including grade 4.)	**W.5.5** With guidance and support from peers and adults, develop and strengthen writing as needed by planning, revising, editing, rewriting, or trying a new approach. (Editing for conventions should demonstrate command of Language standards 1–3 up to and including grade 5.)
W.3.6 With guidance and support from adults, use technology to produce and publish writing (using keyboarding skills) as well as to interact and collaborate with others; demonstrate sufficient command of keyboarding skills to type a minimum of one page in a single setting. (e.g., 1-3 paragraphs)~~.~~	**W.4.6** With some guidance and support from adults, use technology, including the Internet, to produce and publish writing as well as to interact and collaborate with others; demonstrate sufficient command of keyboarding skills to type multi-paragraph text. (e.g., 1-2 pages)~~a minimum of one page in a single sitting.~~	**W.5.6** With some guidance and support from adults, use technology, including the Internet, to produce and publish writing as well as to interact and collaborate with others; demonstrate sufficient command of keyboarding skills to type multi-paragraph text. (e.g., 1-3pages) ~~a minimum of two pages in a single sitting.~~
Research to Build and Present Knowledge		
W.3.7 Conduct short research projects that build knowledge about a topic.	**W.4.7** Conduct short research projects that build knowledge through investigation of different aspects of a topic.	**W.5.7** Conduct short research projects that use several sources to build knowledge through investigation of different aspects of a topic.
W.3.8 Recall information from experiences or gather information from print and digital sources; take brief notes on sources and sort evidence into provided categories.	**W.4.8** Recall relevant information from experiences or gather relevant information from print and digital sources; take notes and categorize information, and provide a list of sources.	**W.5.8** Recall relevant information from experiences or gather relevant information from print and digital sources; summarize or paraphrase information in notes and finished work, and provide a list of sources.
W.3.9 (Begins in grade 4)	W.**4.9** Draw evidence from literary or informational texts to support analysis, reflection, and research. a. Apply grade 4 Reading standards to literature (e.g., "Describe in depth a character, setting, or event in a story or drama, drawing on specific details in the text [e.g., a character's thoughts, words, or actions]."). b. Apply grade 4 Reading standards to informational texts (e.g., "Explain how an author uses reasons and evidence to support particular points in a text").	**W.5.9** Draw evidence from literary or informational texts to support analysis, reflection, and research. a. Apply grade 5 Reading standards to literature (e.g., "Compare and contrast two or more characters, settings, or events in a story or a drama, drawing on specific details in the text [e.g., how characters interact]"). b. Apply grade 5 Reading standards to informational texts (e.g., "Explain how an author uses reasons and evidence to support particular points in a text, identifying which reasons and evidence support which point[s]").
Range of Writing		
W.3.10 Write routinely over extended time frames (time for research, reflection, and revision) and shorter time frames (a single sitting or a day or two) for a range of discipline-specific tasks, purposes, and audiences.	**W.4.10** Write routinely over extended time frames (time for research, reflection, and revision) and shorter time frames (a single sitting or a day or two) for a range of discipline-specific tasks, purposes, and audiences.	**W.5.10** Write routinely over extended time frames (time for research, reflection, and revision) and shorter time frames (a single sitting or a day or two) for a range of discipline-specific tasks, purposes, and audiences.

College and Career Readiness Anchor Standards for Speaking and Listening

The K–5 standards on the following pages define what students should understand and be able to do by the end of each grade. They correspond to the College and Career Readiness (CCR) anchor standards below by number. The CCR and grade-specific standards are necessary complements—the former providing broad standards, the latter providing additional specificity—that together define the skills and understandings that all students must demonstrate.

Comprehension and Collaboration

CCRA.SL.1 Prepare for and participate effectively in a range of conversations and collaborations with diverse partners, building on others' ideas and expressing their own clearly and persuasively.

CCRA.SL.2 Integrate and evaluate information presented in diverse media and formats, including visually, quantitatively, and orally.

CCRA.SL.3 Evaluate a speaker's point of view, reasoning, and use of evidence and rhetoric.

Presentation of Knowledge and Ideas

CCRA.SL.4 Present information, findings, and supporting evidence such that listeners can follow the line of reasoning and the organization, development, and style are appropriate to task, purpose, and audience.

CCRA.SL.5 Make strategic use of digital media and visual displays of data to express information and enhance understanding of presentations.

CCRA.SL.6 Adapt speech to a variety of contexts and communicative tasks, demonstrating command of formal English when indicated or appropriate.

***These broad types of writing include many subgenres. See Appendix A for definitions of key writing types.*

Note on range and content of student speaking and listening

To build a foundation for college and career readiness, students must have ample opportunities to take part in a variety of rich, structured conversations—as part of a whole class, in small groups, and with a partner. Being productive members of these conversations requires that students contribute accurate, relevant information; respond to and develop what others have said; make comparisons and contrasts; and analyze and synthesize a multitude of ideas in various domains.

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Speaking and Listening Standards K–5 SL

The following standards for K–5 offer a focus for instruction each year to help ensure that students gain adequate mastery of a range of skills and applications. *Students advancing through he grades are expected to meet each year's grade-specific standards and retain or further develop skills and understanding mastered in preceding grades.*

Kindergartners:	**Grade 1 Students:**	**Grade 2 Students:**
Comprehension and Collaboration		
SL.K.1 Participate in collaborative conversations with diverse partners about kindergarten topics and texts with peers and adults in small and larger groups. a. Follow agreed-upon rules for discussions (e.g., listening to others and taking turns speaking about the topics and texts under discussion). b. Continue a conversation through multiple exchanges.	**SL.1.1** Participate in collaborative conversations with diverse partners about *grade 1 topics and texts* with peers and adults in small and larger groups. a) Follow agreed-upon rules for discussions (e.g., listening to others with care, speaking one at a time about the topics and texts under discussion). b) Build on others' talk in conversations by responding to the comments of others through multiple exchanges. c) Ask questions to clear up any confusion about the topics and texts under discussion.	**SL.3.1** Participate in collaborative conversations with diverse partners about *grade 2 topics and texts* with peers and adults in small and larger groups a. Follow agreed-upon rules for discussions (e.g., gaining the floor in respectful ways, listening to others with care, speaking one at a time about the topics and texts under discussion). b. Build on others' talk in conversations by linking their comments to the remarks of others. c. Ask for clarification and further explanation as needed about the topics and texts under discussion.
SL.K.2 Confirm understanding of a text read aloud or information presented orally or through other media by asking and answering questions about key details and requesting clarification if something is not understood.	**SL.1.2** Ask and answer questions about key details in a text read aloud or information presented orally or through other media.	**SL.3.2** Recount or describe key ideas or details from a text read aloud or information presented orally or through other media.
SL.K.3 Ask and answer questions in order to seek help, get information, or clarify something that is not understood.	**SL.1.3** Ask and answer questions about what a speaker says in order to gather additional information or clarify something that is not understood.	**SL.3.3** Ask and answer questions about what a speaker says in order to clarify comprehension, gather additional information, or deepen understanding of a topic or issue.
Presentation of Knowledge and Ideas		
SL.K.4 Describe familiar people, places, things, and events and, with prompting and support, provide additional detail.	**SL.1.4** Describe people, places, things, and events with relevant details, expressing ideas and feelings clearly.	**SL.3.4** Tell a story or recount an experience with appropriate facts and relevant, descriptive details, speaking audibly in coherent sentences.
SL.K.5 Add drawings or other visual displays to descriptions as desired to provide additional detail.	**SL.1.5** Add drawings or other visual displays to descriptions when appropriate to clarify ideas, thoughts, and feelings.	**SL.3.5** Create audio recordings of stories or poems; add drawings or other visual displays to stories or recounts of experiences when appropriate to clarify ideas, thoughts, and feelings.
SL.K.6 Speak audibly and express thoughts, feelings, and ideas clearly.	**SL.1.6** Produce complete sentences when appropriate to task and situation. (See grade 1 Language standards 1 and 3.)	**SL.3.6** Produce complete sentences when appropriate to task and situation in order to provide requested detail or clarification. (See grade 2 Language standards 1 and 3.)

Speaking and Listening Standards K–5 SL

Grade 3 Students:	Grade 4 Students:	Grade 5 Students:
Comprehension and Collaboration		
SL.3.1 Engage effectively in a range of collaborative discussions (one-on-one, in groups, and teacher-led) with diverse partners on grade 3 topics and texts, building on others' ideas and expressing their own clearly. a. Come to discussions prepared, having read or studied required material; explicitly draw on that preparation and other information known about the topic to explore ideas under discussion. b. Follow agreed-upon rules for discussions (e.g., gaining the floor in respectful ways, listening to others with care, speaking one at a time about the topics and texts under discussion). c. Ask questions to check understanding of information presented, stay on topic, and link their comments to the remarks of others. d. Explain their own ideas and understanding in light of the discussion.	**SL.4.1** Engage effectively in a range of collaborative discussions (one-on-one, in groups, and teacher- led) with diverse partners on grade 4 topics and texts, building on others' ideas and expressing their own clearly. a. Come to discussions prepared, having read or studied required material; explicitly draw on that preparation and other information known about the topic to explore ideas under discussion. b. Follow agreed-upon rules for discussions and carry out assigned roles. c. Pose and respond to specific questions to clarify or follow up on information, and make comments that contribute to the discussion and link to the remarks of others. d. Review the key ideas expressed and explain their own ideas and understanding in light of the discussion.	**SL.5.1** Engage effectively in a range of collaborative discussions (one-on-one, in groups, and teacher- led) with diverse partners on grade 5 topics and texts, building on others' ideas and expressing their own clearly. a. Come to discussions prepared, having read or studied required material; explicitly draw on that preparation and other information known about the topic to explore ideas under discussion. b. Follow agreed-upon rules for discussions and carry out assigned roles. c. Pose and respond to specific questions by making comments that contribute to the discussion and elaborate on the remarks of others. d. Review the key ideas expressed and draw conclusions in light of information and knowledge gained from the discussions.
SL.3.2 Determine the main ideas and supporting details of a text read aloud or information presented in diverse media and formats, including visually, quantitatively, and orally.	**SL.4.2** Paraphrase portions of a text read aloud or information presented in diverse media and formats, including visually, quantitatively, and orally.	**SL.5.2** Summarize a written text read aloud or information presented in diverse media and formats, including visually, quantitatively, and orally.
SL.3.3. Ask and answer questions about information from a speaker, offering appropriate elaboration and detail.	**SL.4.3** Identify the reasons and evidence a speaker provides to support particular points.	**SL.5.3** Summarize the points a speaker makes and explain how each claim is supported by reasons and evidence.
Presentation of Knowledge and Ideas		
SL.3.4 Report on a topic or text, tell a story, or recount an experience with appropriate facts and relevant, descriptive details, speaking clearly at an understandable pace.	**SL.4.4** Report on a topic or text, tell a story, or recount an experience in an organized manner, using appropriate facts and relevant, descriptive details to support main ideas or themes; speak clearly at an understandable pace.	**SL.4.5** Report on topic or text or present an opinion, sequencing ideas logically and using appropriate facts and relevant descriptive details to support main ideas or themes; speak clearly at an understandable pace.
SL.3.5 Create engaging audio recordings of stories or poems that demonstrate fluid reading at an understandable pace; add visual displays when appropriate to emphasize or enhance certain facts or details.	**SL.4.5** Add audio recordings and visual displays to presentations when appropriate to enhance the development of main ideas or themes.	**SL.5.5** Include multimedia components (e.g., graphics, sound) and visual displays in presentations when appropriate to enhance the development of main ideas or themes.

SL.3.6 Speak in complete sentences when appropriate to task and situation in order to provide requested detail or clarification. (See grade 3 Language standards 1 and 3 for specific expectations.)	**SL.4.6** Differentiate between contexts that call for formal English (e.g., presenting ideas) and situations where informal discourse is appropriate (e.g., small-group discussion); use formal English when appropriate to task and situation. (See grade 4 Language standards 1 for specific expectations.)	**SL.5.6** Adapt speech to a variety of contexts and tasks, using formal English when appropriate to task and situation. (See grade 5 Language standards 1 and 3 for specific expectations.)

College and Career Readiness Anchor Standards for Language

The K–5 standards on the following pages define what students should understand and be able to do by the end of each grade. They correspond to the College and Career Readiness (CCR) anchor standards below by number. The CCR and grade-specific standards are necessary complements—the former providing broad standards, the latter providing additional specificity—that together define the skills and understandings that all students must demonstrate.

<u>**Conventions of Standard English**</u>

CCRA.L.1 Demonstrate command of the conventions of standard English grammar and usage when writing or speaking.

CCRA.L.2 Demonstrate command of the conventions of standard English capitalization, punctuation, and spelling when writing.

<u>**Knowledge of Language**</u>

CCRA.L.3 Apply knowledge of language to understand how language functions in different contexts, to make effective choices for meaning or style, and to comprehend more fully when reading or listening.

<u>**Vocabulary acquisition and Use**</u>

CCRA.L.4 Determine or clarify the meaning of unknown and multiple-meaning words and phrases by using context clues, analyzing meaningful word parts, and consulting general and specialized reference materials, as appropriate.

CCRA.L.5 Demonstrate understanding of figurative language, word relationships, and nuances in word meanings.

CCRA.L.6 Acquire and use accurately a range of general academic and domain-specific words and phrases sufficient for reading, writing, speaking, and listening at the college and career readiness level; demonstrate independence in gathering vocabulary knowledge when encountering an unknown term important to comprehension or expression.

Note on range and content of student language use

To build a foundation for college and career readiness in language, students must gain control over many conventions of standard English grammar, usage, and mechanics as well as learn other ways to use language to convey meaning effectively. They must also be able to determine or clarify the meaning of grade-appropriate words encountered through listening, reading, and media use; come to appreciate that words have nonliteral meanings, shadings of meaning, and relationships to other words; and expand their vocabulary in the course of studying content. The inclusion of Language standards in their own strand should not be taken as an indication that skills related to conventions, effective language use, and vocabulary are unimportant to reading, writing, speaking, and listening; indeed, they are inseparable from such contexts.

Language Standards K–5 L

The following standards for grades K–5 offer a focus for instruction each year to help ensure that students gain adequate mastery of a range of skills and applications. *Students advancing through the grades are expected to meet each year's grade-specific standards and retain or further develop skills and understandings mastered in preceding grades.* Beginning in grade 3, skills and understandings that are particularly likely to require continued attention in higher grades as they are applied to increasingly sophisticated writing and speaking are marked with an asterisk (*). See the table on page 30 for a complete list and Appendix A for an example of how these skills develop in sophistication.

Kindergartners:	Grade 1 Students:	Grade 2 Students:
Conventions of Standard English		
L.K.1 Demonstrate command of the conventions of standard English grammar and usage when writing or speaking. a. Print many upper- and lowercase letters. b. Use frequently occurring nouns and verbs. c. Form regular plural nouns orally by adding /s/ or /es/ (e.g., dog, dogs; wish, wishes). d. Understand and use question words (interrogatives) (e.g., who, what, where, when, why, how). e. Use the most frequently occurring prepositions (e.g., to, from, in, out, on, off, for, of, by, with). f. Produce and expand complete sentences in shared language activities.	**L.1.1** Demonstrate command of the conventions of standard English grammar and usage when writing or speaking. a. Print all upper- and lowercase letters. b. Use common, proper, and possessive nouns. c. Use singular and plural nouns with matching verbs in basic sentences (e.g., He hops; We hop). d. Use personal, possessive, and indefinite pronouns (e.g., I, me, my; they, them, their; anyone, everything). e. Use verbs to convey a sense of past, present, and future (e.g., Yesterday I walked home; Today I walk home; Tomorrow I will walk home). f. Use frequently occurring adjectives. g. Use frequently occurring conjunctions (e.g., and, but, or, so, because). h. Use determiners (e.g., articles, demonstratives). i. Use frequently occurring prepositions (e.g., during, beyond, toward). j. Produce and expand complete simple and compound declarative, interrogative, imperative, and exclamatory sentences in response to prompts.	**L.2.1** Demonstrate command of the conventions of standard English grammar and usage when writing or speaking. a. Use collective nouns (e.g., group). b. Form and use frequently occurring irregular plural nouns (e.g., feet, children, teeth, mice, fish). c. Use reflexive pronouns (e.g., myself, ourselves). d. Form and use the past tense of frequently occurring irregular verbs (e.g., sat, hid, told). e. Use adjectives and adverbs, and choose between them depending on what is to be modified. f. Produce, expand, and rearrange complete simple and compound sentences (e.g., The boy watched the movie; The little boy watched the movie; The action movie was watched by the little boy).
L.K.2 Demonstrate command of the conventions of standard English capitalization, punctuation, and spelling when writing. a. Capitalize the first word in a sentence and the pronoun I. b. Recognize and name end punctuation. c. Write a letter or letters for most consonant and short-vowel sounds (phonemes). d. Spell simple words phonetically, drawing on knowledge of sound-letter relationships.	**L.1.2** Demonstrate command of the conventions of standard English capitalization, punctuation, and spelling when writing. a. Capitalize dates and names of people. b. Use end punctuation for sentences. c. Use commas in dates and to separate single words in a series. d. Use conventional spelling for words with common spelling patterns and for frequently occurring irregular words. e. Spell untaught words phonetically, drawing on phonemic awareness and spelling conventions.	**L.2.2** Demonstrate command of the conventions of standard English capitalization, punctuation, and spelling when writing. a. Capitalize holidays, product names, and geographic names. b. Use commas in greetings and closings of letters. c. Use an apostrophe to form contractions and frequently occurring possessives. d. Generalize learned spelling patterns when writing words (e.g., cage → badge; boy → boil). e. Consult reference materials, including beginning dictionaries, as needed to check and correct spellings.
Knowledge of Language		
L.K.3 (Begins in grade 2)	**L.1.3** (Begins in grade 2)	**L.2.3** Use knowledge of language and its conventions when writing, speaking, reading, or listening.

		a. Compare formal and informal uses of English.
Vocabulary Acquisition and Use		
L.K.4 Determine or clarify the meaning of unknown and multiple-meaning words and phrases based on kindergarten reading and content. a. Identify new meanings for familiar words and apply them accurately (e.g., knowing duck is a bird and learning the verb to duck). b. Use the most frequently occurring inflections and affixes (e.g., -ed, -s, re-, un-, pre-, -ful, -less) as a clue to the meaning of an unknown word.	**L.1.4** Determine or clarify the meaning of unknown and multiple-meaning words and phrases based on grade 1 reading and content, choosing flexibly from an array of strategies. a. Use sentence-level context as a clue to the meaning of a word or phrase. b. Use frequently occurring affixes as a clue to the meaning of a word. c. Identify frequently occurring root words (e.g., look) and their inflectional forms (e.g., looks, looked, looking).	**L.2.4** Determine or clarify the meaning of unknown and multiple-meaning words and phrases based on grade 2 reading and content, choosing flexibly from an array of strategies. a. Use sentence-level context as a clue to the meaning of a word or phrase. b. Determine the meaning of the new word formed when a known prefix is added to a known word (e.g., happy/unhappy, tell/retell). c. Use a known root word as a clue to the meaning of an unknown word with the same root (e.g., addition, additional). d. Use knowledge of the meaning of individual words to predict the meaning of compound words (e.g., birdhouse, lighthouse, housefly; bookshelf, notebook, bookmark). e. Use glossaries and beginning dictionaries, both print and digital, to determine or clarify the meaning of words and phrases.
L.K.5 With guidance and support from adults, explore word relationships and nuances in word meanings. a. Sort common objects into categories (e.g., shapes, foods) to gain a sense of the concepts the categories represent. b. Demonstrate understanding of frequently occurring verbs and adjectives by relating them to their opposites (antonyms). Identify real-life connections between words and their use (e.g., note places at school that are colorful). c. Distinguish shades of meaning among verbs describing the same general action (e.g., walk, march, strut, prance) by acting out the meanings.	**L.1.5** With guidance and support from adults, demonstrate understanding of word relationships and nuances in word meanings. a. Sort words into categories (e.g., colors, clothing) to gain a sense of the concepts the categories represent. b. Define words by category and by one or more key attributes (e.g., a duck is a bird that swims; a tiger is a large cat with stripes). Identify real-life connections between words and their use (e.g., note places at home that are cozy). c. Distinguish shades of meaning among verbs differing in manner (e.g., look, peek, glance, stare, glare, scowl) and adjectives differing in intensity (e.g., large, gigantic) by defining or choosing them or by acting out the meanings.	**L.2.5** Demonstrate understanding of word relationships and nuances in word meanings. a. Identify real-life connections between words and their use (e.g., describe foods that are spicy or juicy). b. Distinguish shades of meaning among closely related verbs (e.g., toss, throw, hurl) and closely related adjectives (e.g., thin, slender, skinny, scrawny).
L.K.6 Use words and phrases acquired through conversations, reading and being read to, and responding to texts.	**L.1.6** Use words and phrases acquired through conversations, reading and being read to, and responding to texts, including using frequently occurring conjunctions to signal simple relationships (e.g., because).	**L.2.6** Use words and phrases acquired through conversations, reading and being read to, and responding to texts, including using adjectives and adverbs to describe (e.g., When other kids are happy that makes me happy).

Language Standards K–5 L

Grade 3 Students:	Grade 4 Students:	Grade 5 Students:
Conventions of Standard English		
L.3.1 Demonstrate command of the conventions of standard English grammar and usage when writing or speaking. a. Explain the function of nouns, pronouns, verbs, adjectives, and adverbs in general and their functions in particular sentences. b. Form and use regular and irregular plural nouns. c. Use abstract nouns (e.g., childhood). d. Form and use regular and irregular verbs. e. Form and use the simple (e.g., I walked; I walk; I will walk) verb tenses. f. Ensure subject-verb and pronoun-antecedent agreement.* g. Form and use comparative and superlative adjectives and adverbs, and choose between them depending on what is to be modified. h. Use coordinating and subordinating conjunctions. i. Produce simple, compound, and complex sentences.	**L.4.1** Demonstrate command of the conventions of standard English grammar and usage when writing or speaking. a. Use relative pronouns (who, whose, whom, which, that) and relative adverbs (where, when, why). b. Form and use the progressive (e.g., I was walking; I am walking; I will be walking) verb tenses. c. Use modal auxiliaries (e.g., can, may, must) to convey various conditions. d. Order adjectives within sentences according to conventional patterns (e.g., a small red bag rather than a red small bag). e. Form and use prepositional phrases. f. Produce complete sentences, recognizing and correcting inappropriate fragments and run-ons.* g. Correctly use frequently confused words (e.g., to, too, two; there, their).*	**L.5.1** Demonstrate command of the conventions of standard English grammar and usage when writing or speaking. a. Explain the function of conjunctions, prepositions, and interjections in general and their function in particular sentences. b. Form and use the perfect (e.g., I had walked; I have walked; I will have walked) verb tenses. c. Use verb tense to convey various times, sequences, states, and conditions. d. Recognize and correct inappropriate shifts in verb tense.* e. Use correlative conjunctions (e.g., either/or, neither/nor).
L.3.2 Demonstrate command of the conventions of standard English capitalization, punctuation, and spelling when writing. a. Capitalize appropriate words in titles. b. Use commas in addresses. c. Use commas and quotation marks in dialogue. Form and use possessives. d. Use conventional spelling for high-frequency and other studied words and for adding suffixes to base words (e.g., sitting, smiled, cries, happiness). e. Use spelling patterns and generalizations (e.g., word families, position-based spellings, syllable patterns, ending rules, meaningful word parts) in writing words. f. Consult reference materials, including beginning dictionaries, as needed to check and correct spelling.	**L.4.2** Demonstrate command of the conventions of standard English capitalization, punctuation, and spelling when writing. a. Use correct capitalization. b. Use commas and quotation marks to mark direct speech and quotations from a text. c. Use a comma before a coordinating conjunction in a compound sentence. d. Spell grade-appropriate words correctly, consulting references as needed.	**L.5.2** Demonstrate command of the conventions of standard English capitalization, punctuation, and spelling when writing. a. Use punctuation to separate items in a series.* b. Use a comma to separate an introductory element from the rest of the sentence. c. Use a comma to set off the words yes and no (e.g., Yes, thank you), to set off a tag question from the rest of the sentence (e.g., It's true, isn't it?), and to indicate direct address (e.g., Is that you, Steve?). d. Use underlining, quotation marks, or italics to indicate titles of works. e. Spell grade-appropriate words correctly, consulting references as needed.
Knowledge of Language		
L.3.3 Use knowledge of language and its conventions when writing, speaking, reading, or listening. a. Choose words and phrases for effect.* b. Recognize and observe differences between the conventions of spoken and written standard English.	**L.4.3** Use knowledge of language and its conventions when writing, speaking, reading, or listening. a. Choose words and phrases to convey ideas precisely.* b. Choose punctuation for effect.* c. Differentiate between contexts that call for formal English (e.g., presenting ideas) and situations where informal discourse is appropriate (e.g., small-group	**L.5.3** Use knowledge of language and its conventions when writing, speaking, reading, or listening. a. Expand, combine, and reduce sentences for meaning, reader/listener interest, and style. b. Compare and contrast the varieties of English (e.g., dialects, registers) used in stories, dramas, or poems.

	discussion).	
Vocabulary Acquisition and Use		
L.3.4 Determine or clarify the meaning of unknown and multiple-meaning word and phrases based on grade 3 reading and content, choosing flexibly from a range of strategies. a. Use sentence-level context as a clue to the meaning of a word or phrase. b. Determine the meaning of the new word formed when a known affix is added to a known word (e.g., agreeable/disagreeable, comfortable/uncomfortable, care/careless, heat/preheat). c. Use a known root word as a clue to the meaning of an unknown word with the same root (e.g., company, companion). d. Use glossaries or beginning dictionaries, both print and digital, to determine or clarify the precise meaning of key words and phrases.	**L.4.4** Determine or clarify the meaning of unknown and multiple-meaning words and phrases based on grade 4 reading and content, choosing flexibly from a range of strategies. a. *Use* context (e.g., definitions, examples, or restatements in text) as a clue to the meaning of a word or phrase. b. Use common, grade-appropriate Greek and c. Latin affixes and roots as clues to the meaning of a word (e.g., telegraph, photograph, autograph). d. Consult reference materials (e.g., dictionaries, glossaries, thesauruses), both print and digital, to find the pronunciation and determine or clarify the precise meaning of key words and phrases.	**L.5.4** Determine or clarify the meaning of unknown and multiple-meaning words and phrases based on grade 5 reading and content, choosing flexibly from a range of strategies. a. Use context (e.g., cause/effect relationships and comparisons in text) as a clue to the meaning of a word or phrase. b. Use common, grade-appropriate Greek and Latin affixes and roots as clues to the meaning of a word (e.g., photograph, photosynthesis). c. Consult reference materials (e.g., dictionaries, glossaries, thesauruses), both print and digital, to find the pronunciation and determine or clarify the precise meaning of key words and phrases.
L.3.5 Demonstrate understanding of word relationships and nuances in word meanings. a. Distinguish the literal and nonliteral meanings of words and phrases in context (e.g., take steps). b. Identify real-life connections between words and their use (e.g., describe people who are friendly or helpful). c. Distinguish shades of meaning among related words that describe states of mind or degrees of certainty (e.g., knew, believed, suspected, heard, wondered).	**L.4.5** Demonstrate understanding of figurative language, word relationships, and nuances in word meanings. a. Explain the meaning of simple similes and metaphors (e.g., as pretty as a picture) in context. b. Recognize and explain the meaning of common idioms, adages, and proverbs. c. Demonstrate understanding of words by relating them to their opposites (antonyms) and to words with similar but not identical meanings (synonyms).	**L.5.5** Demonstrate understanding of figurative language, word relationships, and nuances in word meanings. a. Interpret figurative language, including similes and metaphors, in context. b. Recognize and explain the meaning of common idioms, adages, and proverbs. c. Use the relationship between particular words (e.g., synonyms, antonyms, homographs) to better understand each of the words.
L.3.6 Acquire and use accurately grade-appropriate conversational, general academic, and domain-specific words and phrases, including those that signal spatial and temporal relationships (e.g., After dinner that night we went looking for them).	**L.4.6** Acquire and use accurately grade-appropriate general academic and domain-specific words and phrases, including those that signal precise actions, emotions, or states of being (e.g., quizzed, whined, stammered) and that are basic to a particular topic (e.g., wildlife, conservation, and endangered when discussing animal preservation).	**L.5.6** Acquire and use accurately grade-appropriate general academic and domain-specific words and phrases, including those that signal contrast, addition, and other logical relationships (e.g., however, although, nevertheless, similarly, moreover, in addition).

Language Progressive Skills, by Grade

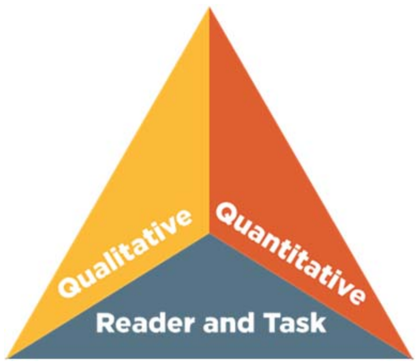
The following skills, marked with an asterisk (*) in Language standards 1–3, are particularly likely to require continued attention in higher grades as they are applied to increasingly sophisticated writing and speaking.

Standard	Grade(s)							
	3	4	5	6	7	8	9–10	11–12
L.3.1f. Ensure subject-verb and pronoun-antecedent agreement.								
L.3.3a. Choose words and phrases for effect.								
L.4.1f. Produce complete sentences, recognizing and correcting inappropriate fragments and run-ons.								
L.4.1g. Correctly use frequently confused words (e.g., *to/too/two; there/their*).								
L.4.3a. Choose words and phrases to convey ideas precisely.*								
L.4.3b. Choose punctuation for effect.								
L.5.1d. Recognize and correct inappropriate shifts in verb tense.								
L.5.2a. Use punctuation to separate items in a series.†								
L.6.1c. Recognize and correct inappropriate shifts in pronoun number and person.								
L.6.1d. Recognize and correct vague pronouns (i.e., ones with unclear or ambiguous antecedents).								
L.6.1e. Recognize variations from standard English in their own and others' writing and speaking, and identify and use strategies to improve expression in conventional language.								
L.6.2a. Use punctuation (commas, parentheses, dashes) to set off nonrestrictive/parenthetical elements.								
L.6.3a. Vary sentence patterns for meaning, reader/listener interest, and style.‡								
L.6.3b. Maintain consistency in style and tone.								
L.7.1c. Place phrases and clauses within a sentence, recognizing and correcting misplaced and dangling modifiers.								
L.7.3a. Choose language that expresses ideas precisely and concisely, recognizing and eliminating wordiness and redundancy.								
L.8.1d. Recognize and correct inappropriate shifts in verb voice and mood.								
L.9–10.1a. Use parallel structure.								

*Subsumed by L.7.3a
†Subsumed by L.9–10.1a
‡Subsumed by L.11–12.3a

Standard 10: Range, Quality, and Complexity of Student Reading K–5

Measuring Text Complexity: Three Factors



Qualitative evaluation of the text: Levels of meaning, structure, language conventionality and clarity, and knowledge demands

Quantitative evaluation of the text: Readability measures and other scores of text complexity

Matching reader to text and task: Reader variables (such as motivation, knowledge, and experiences) and task variables (such as purpose and the complexity generated by the task assigned and the questions posed)

Note: More detailed information on text complexity and how it is measured is contained in Appendix A.

Range of Text Types for K–5

Students in K–5 apply the Reading standards to the following range of text types, with texts selected from a broad range of cultures and periods.

Literature			Informational Text
Stories	**Dramas**	**Poetry**	**Literary nonfiction and Historical, Scientific, and technical texts**
Includes children's adventure stories, folktales, legends, fables, fantasy, realistic fiction, and myth	Includes staged dialogue and brief familiar scenes	Includes nursery rhymes and the subgenres of the narrative poem, limerick, and free verse poem	Includes biographies and autobiographies; books about history, social studies, science, and the arts; technical texts, including directions, forms, and information displayed in graphs, charts, or maps; and digital sources on a range of topics

Texts Illustrating the Complexity, Quality, and Range of Student Reading K–5

	Literature: Stories, drama, Poetry	Informational texts: Literary nonfiction and Historical, Scientific, and technical
K*	▪ *Over in the Meadow* by John Langstaff (traditional) (c1800)* ▪ *A Boy, a Dog, and a Frog* by Mercer Mayer (1967) ▪ *Pancakes for Breakfast* by Tomie DePaola (1978) ▪ *A Story, A Story* by Gail E. Haley (1970)* ▪ *Kitten's First Full Moon* by Kevin Henkes (2004)*	*My Five Senses* by Aliki (1962)** *Truck* by Donald Crews (1980) *I Read Signs* by Tana Hoban (1987) *What Do You Do With a Tail Like This?* by Steve Jenkins and Robin Page (2003)* *Amazing Whales!* by Sarah L. Thomson (2005)*
1*	▪ "Mix a Pancake" by Christina G. Rossetti (1893)** ▪ *Mr. Popper's Penguins* by Richard Atwater (1938)* ▪ *Little Bear* by Else Holmelund Minarik, illustrated by Maurice Sendak (1957)** ▪ *Frog and Toad Together* by Arnold Lobel (1971)** ▪ *Hi! Fly Guy* by Tedd Arnold (2006)	*A Tree Is a Plant* by Clyde Robert Bulla, illustrated by Stacey Schuett (1960)** *Starfish* by Edith Thacher Hurd (1962) *Follow the Water from Brook to Ocean* by Arthur Dorros (1991)** *From Seed to Pumpkin* by Wendy Pfeffer, illustrated by James Graham Hale *How People Learned to Fly* by Fran Hodgkins and True Kelley (2007)*
2–3	▪ "Who Has Seen the Wind?" by Christina G. Rossetti (1893) ▪ *Charlotte's Web* by E. B. White (1952)* ▪ *Sarah, Plain and Tall* by Patricia MacLachlan (1985) ▪ *Tops and Bottoms* by Janet Stevens (1995) ▪ *Poppleton in Winter* by Cynthia Rylant, illustrated by Mark Teague (2001)	*A Medieval Feast* by Aliki (1983) *From Seed to Plant* by Gail Gibbons (1991) *The Story of Ruby Bridges* by Robert Coles (1995)* *A Drop of Water: A Book of Science and Wonder* by Walter Wick (1997) *Moonshot: The Flight of Apollo 11* by Brian Floca (2009)
4–5	▪ *Alice's Adventures in Wonderland* by Lewis Carroll (1865) ▪ "Casey at the Bat" by Ernest Lawrence Thayer (1888) ▪ *The Black Stallion* by Walter Farley (1941) ▪ "Zlateh the Goat" by Isaac Bashevis Singer (1984) ▪ *Where the Mountain Meets the Moon* by Grace Lin (2009)	*Discovering Mars: The Amazing Story of the Red Planet* by Melvin Berger (1992) *Hurricanes: Earth's Mightiest Storms* by Patricia Lauber (1996) *A History of US* by Joy Hakim (2005) *Horses* by Seymour Simon (2006) *Quest for the Tree Kangaroo: An Expedition to the Cloud Forest of New Guinea* by Sy Montgomery (2006)

<u>Note:</u> Given space limitations, the illustrative texts listed above are meant only to show individual titles that are representative of a wide range of topics and genres. (See Appendix B for excerpts of these and other texts illustrative of K–5 text complexity, quality, and range.) At a curricular or instructional level, within and across grade levels, texts need to be selected around topics or themes that generate knowledge and allow students to study those topics or themes in depth. On the next page is an example of progressions of texts building knowledge across grade levels.

*Children at the kindergarten and grade 1 levels should be expected to read texts independently that have been specifically written to correlate to their reading level and their word knowl- edge. Many of the titles listed above are meant to supplement carefully structured independent reading with books to read along with a teacher or that are read aloud to students to build knowledge and cultivate a joy in reading.

Staying on Topic Within a Grade and Across Grades:

How to Build Knowledge Systematically in English Language Arts K–5

Building knowledge systematically in English language arts is like giving children various pieces of a puzzle in each grade that, over time, will form one big picture. At a curricular or instructional level, texts—within and across grade levels—need to be selected around topics or themes that systematically develop the knowledge base of students. Within a grade level, there should be an adequate number of titles on a single topic that would allow children to study that topic for a sustained period. The knowledge children have learned about particular topics in early grade levels should then be expanded and developed in subsequent grade levels to ensure an increasingly deeper understanding of these topics. Children in the upper elementary grades will generally be expected to read these texts independently and reflect on them in writing. However, children in the early grades (particularly K–2) should participate in rich, structured conversations with an adult in response to the written texts that are read aloud, orally comparing and contrasting as well as analyzing and synthesizing, in the manner called for by the Standards.

Preparation for reading complex informational texts should begin at the very earliest elementary school grades. What follows is one example that uses domain- specific nonfiction titles across grade levels to illustrate how curriculum designers and classroom teachers can infuse the English language arts block with rich, age-appropriate content knowledge and vocabulary in history/social studies, science, and the arts. Having students listen to informational read-alouds in the early grades helps lay the necessary foundation for students' reading and understanding of increasingly complex texts on their own in subsequent grades.

Exemplar Tests on a Topic

	Kindergarten	Grade 1	Grade 2-3	Grade 4-5
The Human Body Students can begin learning about the human body starting in kindergarten and then review and extend their learning during each subsequent grade.	**The Five Senses and Associated Body Parts** •*My Five Senses* by Aliki (1989) •*Hearing* by Maria Rius (1985) •*Sight* by Maria Rius (1985) •*Smell* by Maria Rius (1985) •*Taste* by Maria Rius (1985) •*Touch* by Maria Rius (1985) **Taking care of your body: overview (hygiene, diet, exercise, rest)** •*My Amazing Body: A First Look at Health & Fitness* by Pat Thomas (2001) •*Get Up and Go!* by Nancy Carlson (2008) •*Go Wash Up* by Doering Tourville (2008) •*Sleep* by Paul Showers (1997) •*Fuel the Body* by Doering Tourville (2008)	**Introduction to the systems of the human body and associated body parts** •*Under Your Skin: Your Amazing Body* by Mick Manning (2007) •*Me and My Amazing Body* by Joan Sweeney (1999) •T*he Human Bo*dy by Gallimard Jeunesse (2007) •*The Busy Body* Book by Lizzy Rockwell (2008) •*First Encyclopedia of the Human Body* by Fiona Chandler (2004) **Taking care of your body: Germs, diseases, and preventing illness** •*Germs Make Me Sick* by Marilyn Berger (1995) •*Tiny Life on Your Bod*y by Christine Taylor-Butler (2005) •*Germ Stories* by Arthur Kornberg (2007) •*All About Scabs* by GenichiroYagu (1998)	**Digestive and Excretory systems** •*What Happens to a Hamburger* by Paul Showers (1985) •*The Digestive System* by Christine Taylor-Butler (2008) •*The Digestive System* by Rebecca L. Johnson (2006) •*The Digestive System* by Kristin Petrie (2007) **Taking care of your body: Healthy eating and nutrition** •*Good Enough to Eat* by Lizzy Rockwell (1999) •*Showdown at the Food Pyramid* by Rex Barron (2004) **Muscular, skeletal, and nervous systems** •*The Mighty Muscular and Skeletal Systems* Crabtree Publishing (2009) •*Muscles* by Seymour Simon (1998) •*Bones* by Seymour Simon (1998) •*The Astounding Nervous System* Crabtree Publishing (2009) *The Nervous System* by Joelle Riley (2004)	**Circulatory system** •*The Heart* by Seymour Simon (2006) •*The Heart and Circulation* by Carol Ballard (2005) •*The Circulatory System* by Kristin Petrie (2007) •*The Amazing Circulatory System* by John Burstein (2009) **Respiratory System** •*The Lungs* by Seymour Simon (2007) •*The Respiratory System* by Susan Glass (2004) •*The Respiratory* System by Kristin Petrie (2007) •*The Remarkable Respiratory System* by John Burstein (2009) **Endocrine System** •*The Endocrine System* by Rebecca Olien (2006) •*The Exciting* Endocrine System by John Burstein (2009)

Idaho Content Standards

English Language Arts/Literacy
&
Literacy in History/Social Studies, Science, and Technical Subjects

6-12 Section

College and Career Readiness Anchor Standards for Reading

The grades 6–12 standards on the following pages define what students should understand and be able to do by the end of each grade. They correspond to the College and Career Readiness (CCR) anchor standards below by number. The CCR and grade-specific standards are necessary complements—the former providing broad standards, the latter providing additional specificity—that together define the skills and understandings that all students must demonstrate.

Key Ideas and details

CCRA.R.1 Read closely to determine what the text says explicitly and to make logical inferences from it; cite specific textual evidence when writing or speaking to support conclusions drawn from the text.

CCRA.R.2 Determine central ideas or themes of a text and analyze their development; summarize the key supporting details and ideas.

CCRA.R.3 Analyze how and why individuals, events, and ideas develop and interact over the course of a text.

Craft and Structure

CCRA.R.4 Interpret words and phrases as they are used in a text, including determining technical, connotative, and figurative meanings, and analyze how specific word choices shape meaning or tone.

CCRA.R.5 Analyze the structure of texts, including how specific sentences, paragraphs, and larger portions of the text (e.g., a section, chapter, scene, or stanza) relate to each other and the whole.

CCRA.R.6 Assess how point of view or purpose shapes the content and style of a text.

Integration of Knowledge and Ideas

CCRA.R.7 Integrate and evaluate content presented in diverse media and formats, including visually and quantitatively, as well as in words.*

CCRA.R.8 Delineate and evaluate the argument and specific claims in a text, including the validity of the reasoning as well as the relevance and sufficiency of the evidence.

CCRA.R.9 Analyze how two or more texts address similar themes or topics in order to build knowledge or to compare the approaches the authors take.

Range of Reading and Level of Text Complexity

CCRA.R.10 Read and comprehend complex literary and informational texts independently and proficiently.

**Please see "Research to Build and Present Knowledge" in Writing and "Comprehension and Collaboration" in Speaking and Listening for additional standards relevant to gathering, assessing, and applying information from print and digital sources.*

Note on range and content of student reading

To become college and career ready, students must grapple with works of exceptional craft and thought whose range extends across genres, cultures, and centuries. Such works offer profound insights into the human condition and serve as models for students' own thinking and writing. Along with high-quality contemporary works, these texts should be chosen from among seminal U.S. documents, the classics of American literature, and the timeless dramas of Shakespeare. Through wide and deep reading of literature and literary nonfiction of steadily increasing sophistication, students gain a reservoir of literary and cultural knowledge, references, and images; the ability to evaluate intricate arguments; and the capacity to surmount the challenges posed by complex texts.

Reading Standards for Literature (6-12) RL

The following standards offer a focus for instruction each year and help ensure that students gain adequate exposure to a range of texts and tasks. Rigor is also infused through the requirement that students read increasingly complex texts through the grades. Students advancing through the grades are expected to meet each year's grade-specific standards and retain or further develop skills and understandings mastered in preceding grades.

Grade 6 Students:	Grade 7 Students:	Grade 8 Students:
Key Ideas and Details		
RL.6.1 Cite textual evidence to support analysis of what the text says explicitly as well as inferences drawn from the text.	**RL.7.1** Cite several pieces of textual evidence to support analysis of what the text says explicitly as well as inferences drawn from the text.	**RL.8.1** Cite the textual evidence that most strongly supports an analysis of what the text says explicitly as well as inferences drawn from the text.
RL.6.2 Determine a theme or central idea of a text and how it is conveyed through particular details; provide a summary of the text distinct from personal opinions or judgments.	**RL.7.2** Determine a theme or central idea of a text and analyze its development over the course of the text; provide an objective summary of the text.	**RL.8.2** Determine a theme or central idea of a text and analyze its development over the course of the text, including its relationship to the characters, setting, and plot; provide an objective summary of the text.
RL.6.3 Describe how a particular story's or drama's plot unfolds in a series of episodes as well as how the characters respond or change as the plot moves toward a resolution.	**RL.7.3** Analyze how particular elements of a story or drama interact (e.g., how setting shapes the characters or plot).	**RL.8.3** Analyze how particular lines of dialogue or incidents in a story or drama propel the action, reveal aspects of a character, or provoke a decision.
Craft and Structure		
RL.6.4 Determine the meaning of words and phrases as they are used in a text, including figurative and connotative meanings; analyze the impact of a specific word choice on meaning and tone.	**RL.7.4** Determine the meaning of words and phrases as they are used in a text, including figurative and connotative meanings; analyze the impact of rhymes and other repetitions of sounds (e.g., alliteration) on a specific verse or stanza of a poem or section of a story or drama.	**RL.8.4** Determine the meaning of words and phrases as they are used in a text, including figurative and connotative meanings; analyze the impact of specific word choices on meaning and tone, including analogies or allusions to other texts.
RL.6.5 Analyze how a particular sentence, chapter, scene, or stanza fits into the overall structure of a text and contributes to the development of the theme, setting, or plot.	**RL.7.5** Analyze how a drama's or poem's form or structure (e.g., soliloquy, sonnet) contributes to its meaning.	**RL.8.5** Compare and contrast the structure of two or more texts and analyze how the differing structure of each text contributes to its meaning and style.
RL.6.6 Explain how an author develops the point of view of the narrator or speaker in a text.	**RL.7.6** Analyze how an author develops and contrasts the points of view of different characters or narrators in a text.	**RL.8.6** Analyze how differences in the points of view of the characters and the audience or reader (e.g., created through the use of dramatic irony) create such effects as suspense or humor.
Integration of Knowledge and Ideas		
RL.6.7 Compare and contrast the experience of reading a story, drama, or poem to listening to or viewing an audio, video, or live version of the text, including contrasting what they "see" and "hear" when reading the text to what they perceive when they listen or watch.	**RL.7.7** Compare and contrast a written story, drama, or poem to its audio, filmed, staged, or multimedia version, analyzing the effects of techniques unique to each medium (e.g., lighting, sound, color, or camera focus and angles in a film).	**RL.8.7** Analyze the extent to which a filmed or live production of a story or drama stays faithful to or departs from the text or script, evaluating the choices made by the director or actors
RL.6.8 (Not applicable to literature)	**RL.7.8** (Not applicable to literature)	**RL.8.8** (Not applicable to literature)
RL.6.9 Compare and contrast texts in different forms or genres (e.g., stories and poems; historical novels and fantasy stories) in terms of their approaches to similar themes and topics.	**RL.7.9** Compare and contrast a fictional portrayal of a time, place, or character and a historical account of the same period as a means of understanding how authors of fiction use or alter history.	**RL.8.9** Analyze how a modern work of fiction draws on themes, patterns of events, or character types from myths, traditional stories, or religious works (e.g., the Bible), ~~such as the Bible,~~ including describing how the material is rendered new.
Range of Reading and Level of Text Complexity		

RL.6.10 By the end of the year, read and comprehend literature, including stories, dramas, and poems, in the grades 6–8 text complexity band proficiently, with scaffolding as needed at the high end of the range.	**RL.7.10** By the end of the year, read and comprehend literature, including stories, dramas, and poems, in the grades 6–8 text complexity band proficiently, with scaffolding as needed at the high end of the range.	**RL.8.10** By the end of the year, read and comprehend literature, including stories, dramas, and poems, at the high end of grades 6–8 text complexity band independently and proficiently.

Reading Standards for Literature (6-12) RL

The CCR anchor standards and high school grade-specific standards work in tandem to define college and career readiness expectations—the former providing broad standards, the latter providing additional specificity.

Grades 9-10 Students:	Grade 11-12 Students:
Key Ideas and Details	
RL.9-10.1 Cite strong and thorough textual evidence to support analysis of what the text says explicitly as well as inferences drawn from the text.	**RL.11-12.1** Cite strong and thorough textual evidence to support analysis of what the text says explicitly as well as inferences drawn from the text, including determining where the text leaves matters uncertain.
RL.9-10.2 Determine a theme or central idea of a text and analyze in detail its development over the course of the text, including how it emerges and is shaped and refined by specific details; provide an objective summary of the text.	**RL.11-12.2** Determine two or more themes or central ideas of a text and analyze their development over the course of the text, including how they interact and build on one another to produce a complex account; provide an objective summary of the text.
RL.9-10.3 Analyze how complex characters (e.g., those with multiple or conflicting motivations) develop over the course of a text, interact with other characters, and advance the plot or develop the theme.	**RL.11-12.3** Analyze the impact of the author's choices regarding how to develop and relate elements of a story or drama (e.g., where a story is set, how the action is ordered, how the characters are introduced and developed).
Craft and Structure	
RL.9-10.4 Determine the meaning of words and phrases as they are used in the text, including figurative and connotative meanings; analyze the cumulative impact of specific word choices on meaning and tone (e.g., how the language evokes a sense of time and place; how it sets a formal or informal tone).	**RL.11-12.4** Determine the meaning of words and phrases as they are used in the text, including figurative and connotative meanings; analyze the impact of specific word choices on meaning and tone, including words with multiple meanings or powerful language that is particularly fresh, engaging, or beautiful. (Include Shakespeare as well as other authors.)
RL.9-10.5 Analyze how an author's choices concerning how to structure a text, order events within it (e.g., parallel plots), and manipulate time (e.g., pacing, flashbacks) create such effects as mystery, tension, or surprise.	**RL.11-12.5** Analyze how an author's choices concerning how to structure specific parts of a text (e.g., the choice of where to begin or end a story, the choice to provide a comedic or tragic resolution) contribute to its overall structure and meaning as well as its aesthetic impact.
RL.9-10.6 Analyze a particular point of view or cultural experience reflected in a work of literature from outside the United States, drawing on a wide reading of world literature.	**RL.11-12.6** Analyze a case in which grasping point of view requires distinguishing what is directly stated in a text from what is really meant (e.g., satire, sarcasm, irony, or understatement).
Integration of Knowledge and Ideas	
RL.9-10.7 Analyze the representation of a subject or a key scene in two different artistic mediums, including what is emphasized or absent in each treatment (e.g., Auden's "Musée des Beaux Arts" and Breughel's Landscape with the Fall of Icarus).	**RL.11-12.7** Analyze multiple interpretations of a story, drama, or poem (e.g., recorded or live production of a play or recorded novel or poetry), evaluating how each version interprets the source text. (Include at least one play by Shakespeare and one play by an American dramatist.)
RL.9-10.8 (Not applicable to literature)	**RL.11-12.8** (Not applicable to literature)
RL.9-10.9 Analyze how an author draws on and transforms source material in a specific work (e.g., how Shakespeare treats a theme or topic from Ovid or the Bible or how a later author draws on a play by Shakespeare)	**RL.11-12.9** Demonstrate knowledge of eighteenth-, nineteenth- and early-twentieth-century foundational works of American literature, and other literary canons, including how two or more texts from the same period treat similar themes or topics.
Range of Reading and Level of Text Complexity	
RL.9-10.10 By the end of grade 9, read and comprehend literature, including stories, dramas, and poems, in the grades 9–10 text complexity band proficiently, with scaffolding as needed at the high end of the range. By the end of grade 10, read and comprehend literature, including stories, dramas, and poems, at the high end of the grades 9–10 text complexity band independently and proficiently.	**RL.11-12.10** By the end of grade 11, read and comprehend literature, including stories, dramas, and poems, in the grades 11–CCR text complexity band proficiently, with scaffolding as needed at the high end of the range. By the end of grade 12, read and comprehend literature, including stories, dramas, and poems, at the high end of the grades 11–CCR text complexity band independently and proficiently.

Reading Standards for Informational Text (6-12) RI

Grade 6 Students:	Grade 7 Students:	Grade 8 Students:
Key Ideas and Details		
RI.6.1 Cite textual evidence to support analysis of what the text says explicitly as well as inferences drawn from the text.	**RI.7.1** Cite several pieces of textual evidence to support analysis of what the text says explicitly as well as inferences drawn from the text.	**RI.8.1** Cite the textual evidence that most strongly supports an analysis of what the text says explicitly as well as inferences drawn from the text.
RI.6.2 Determine a central idea of a text and how it is conveyed through particular details; provide a summary of the text distinct from personal opinions or judgments.	**RI.7.2** Determine two or more central ideas in a text and analyze their development over the course of the text; provide an objective summary of the text.	**RI.8.2** Determine a central idea of a text and analyze its development over the course of the text, including its relationship to supporting ideas; provide an objective summary of the text.
RI.6.3 Analyze in detail how a key individual, event, or idea is introduced, illustrated, and elaborated in a text (e.g., through examples or anecdotes).	**RI.7.3** Analyze the interactions between individuals, events, and ideas in a text (e.g., how ideas influence individuals or events, or how individuals influence ideas or events).	**RI.8.3** Analyze how a text makes connections among and distinctions between individuals, ideas, or events (e.g., through comparisons, analogies, or categories).
Craft and Structure		
RI.6.4 Determine the meaning of words and phrases as they are used in a text, including figurative, connotative, and technical meanings.	**RI.7.4** Determine the meaning of words and phrases as they are used in a text, including figurative, connotative, and technical meanings; analyze the impact of a specific word choice on meaning and tone.	**RI.8.4** Determine the meaning of words and phrases as they are used in a text, including figurative, connotative, and technical meanings; analyze the impact of specific word choices on meaning and tone, including analogies or allusions to other texts.
RI.6.5 Analyze how a particular sentence, paragraph, chapter, or section fits into the overall structure of a text and contributes to the development of the ideas.	**RI.7.5** Analyze the structure an author uses to organize a text, including how the major sections contribute to the whole and to the development of the ideas.	**RI.8.5** Analyze in detail the structure of a specific paragraph in a text, including the role of particular sentences in developing and refining a key concept.
RI.6.6 Determine an author's point of view or purpose in a text and explain how it is conveyed in the text.	**RI.7.6** Determine an author's point of view or purpose in a text and analyze how the author distinguishes his or her position from that of others.	**RI.8.6** Determine an author's point of view or purpose in a text and analyze how the author acknowledges and responds to conflicting evidence or viewpoints.
Integration of Knowledge and Ideas		
RI.6.7 Integrate information presented in different media or formats (e.g., visually, quantitatively) as well as in words to develop a coherent understanding of a topic or issue.	**RI.7.7** Compare and contrast a text to an audio, video, or multimedia version of the text, analyzing each medium's portrayal of the subject (e.g., how the delivery of a speech affects the impact of the words).	**RI.8.7** Evaluate the advantages and disadvantages of using different mediums (e.g., print or digital text, video, multimedia) to present a particular topic or idea.
RI.6.8 Trace and evaluate the argument and specific claims in a text, distinguishing claims that are supported by reasons and evidence from claims that are not.	**RI.7.8** Trace and evaluate the argument and specific claims in a text, assessing whether the reasoning is sound and the evidence is relevant and sufficient to support the claims.	**RI.8.8** Delineate and evaluate the argument and specific claims in a text, assessing whether the reasoning is sound and the evidence is relevant and sufficient; recognize when irrelevant evidence is introduced.
RI.6.9 Compare and contrast one author's presentation of events with that of another (e.g., a memoir written by and a biography on the same person).	**RI.7.9** Analyze how two or more authors writing about the same topic shape their presentations of key information by emphasizing different evidence or advancing different interpretations of facts.	**RI.8.9** Analyze a case in which two or more texts provide conflicting information on the same topic and identify where the texts disagree on matters of fact or interpretation.
Range of Reading and Level of Text Complexity		

RI.6.10 By the end of the year, read and comprehend literary nonfiction in the grades 6–8 text complexity band proficiently, with scaffolding as needed at the high end of the range.	**RI.7.10** By the end of the year, read and comprehend literary nonfiction in the grades 6–8 text complexity band proficiently, with scaffolding as needed at the high end of the range.	**RI.8.10** By the end of the year, read and comprehend literary nonfiction at the high end of the grades 6–8 text complexity band independently and proficiently.

Reading Standards for Informational Text (6-12) RL

The CCR anchor standards and high school grade-specific standards work in tandem to define college and career readiness expectations—the former providing broad standards, the latter providing additional specificity.

Grades 9-10 Students:	Grade 11-12 Students:
Key Ideas and Details	
RI.9-10.1 Cite strong and thorough textual evidence to support analysis of what the text says explicitly as well as inferences drawn from the text.	**RI.11-12.1** Cite strong and thorough textual evidence to support analysis of what the text says explicitly as well as inferences drawn from the text, including determining where the text leaves matters uncertain.
RI.9-10.2 Determine a central idea of a text and analyze its development over the course of the text, including how it emerges and is shaped and refined by specific details; provide an objective summary of the text.	**RI.11-12.2** Determine two or more central ideas of a text and analyze their development over the course of the text, including how they interact and build on one another to provide a complex analysis; provide an objective summary of the text.
RI.9-10.3 Analyze how the author unfolds an analysis or series of ideas or events, including the order in which the points are made, how they are introduced and developed, and the connections that are drawn between them.	**RI.11-12.3** Analyze a complex set of ideas or sequence of events and explain how specific individuals, ideas, or events interact and develop over the course of the text.
Craft and Structure	
RI.9-10.4 Determine the meaning of words and phrases as they are used in a text, including figurative, connotative, and technical meanings; analyze the cumulative impact of specific word choices on meaning and tone (e.g., how the language of a court opinion differs from that of a newspaper).	**RI.11-12.4** Determine the meaning of words and phrases as they are used in a text, including figurative, connotative, and technical meanings; analyze how an author uses and refines the meaning of a key term or terms over the course of a text (e.g., how Madison defines faction in Federalist No. 10).
RI.9-10.5 Analyze in detail how an author's ideas or claims are developed and refined by particular sentences, paragraphs, or larger portions of a text (e.g., a section or chapter).	**RI.11-12.5** Analyze and evaluate the effectiveness of the structure an author uses in his or her exposition or argument, including whether the structure makes points clear, convincing, and engaging.
RI.9-10.6 Determine an author's point of view or purpose in a text and analyze how an author uses rhetoric to advance that point of view or purpose.	**RI.11-12.6** Determine an author's point of view or purpose in a text in which the rhetoric is particularly effective, analyzing how style and content contribute to the power, persuasiveness, or beauty of the text.
Integration of Knowledge and Ideas	
RI.9-10.7 Analyze various accounts of a subject told in different mediums (e.g., a person's life story in both print and multimedia), determining which details are emphasized in each account.	**RI.11-12.7** Integrate and evaluate multiple sources of information presented in different media or formats (e.g., visually, quantitatively) as well as in words in order to address a question or solve a problem.
RI.9-10.8 Delineate and evaluate the argument and specific claims in a text, assessing whether the reasoning is valid and the evidence is relevant and sufficient; identify false statements and fallacious reasoning.	**RI.11-12.8** Delineate and evaluate the reasoning in seminal U.S. and other texts, including the application of constitutional principles and use of legal reasoning (e.g., in U.S. Supreme Court majority opinions and dissents) and the premises, purposes, and arguments in works of public advocacy (e.g., The Federalist, presidential addresses).
RI.9-10.9 Analyze seminal U.S. documents of historical and literary significance (e.g., Washington's Farewell Address, the Gettysburg Address, Roosevelt's Four Freedoms speech, King's "Letter from Birmingham Jail"), including how they address related themes and concepts.	**RI.11-12.9** Analyze seventeenth-, eighteenth-, and nineteenth-century foundational U.S. documents of historical and literary significance (including The Declaration of Independence, the Preamble to the Constitution, the Bill of Rights, and Lincoln's Second Inaugural Address) and other documents of similar significance for their themes, purposes, and rhetorical features.
Range of Reading and Level of Text Complexity	

RI.9-10.10 By the end of grade 9, read and comprehend literary nonfiction in the grades 9–10 text complexity band proficiently, with scaffolding as needed at the high end of the range. By the end of grade 10, read and comprehend literary nonfiction at the high end of the grades 9–10 text complexity band independently and proficiently.	**RI.11-12.10** By the end of grade 11, read and comprehend literary nonfiction in the grades 11–CCR text complexity band proficiently, with scaffolding as needed at the high end of the range. By the end of grade 12, read and comprehend literary nonfiction at the high end of the grades 11–CCR text complexity band independently and proficiently.

College and Career Readiness Anchor Standards for Writing

The grades 6–12 standards on the following pages define what students should understand and be able to do by the end of each grade. They correspond to the College and Career Readiness (CCR) anchor standards below by number. The CCR and grade-specific standards are necessary complements—the former providing broad standards, the latter providing additional specificity—that together define the skills and understandings that all students must demonstrate.

Text Types and Purposes*

CCRA.W.1 Write arguments to support claims in an analysis of substantive topics or texts, using valid reasoning and relevant and sufficient evidence.

CCRA.W.2 Write informative/explanatory texts to examine and convey complex ideas and information clearly and accurately through the effective selection, organization, and analysis of content.

CCRA.W.3 Write narratives to develop real or imagined experiences or events using effective technique, well-chosen details, and well-structured event sequences.

Production and Distribution of Writing

CCRA.W.4 Produce clear and coherent writing in which the development, organization, and style are appropriate to task, purpose, and audience.

CCRA.W.5 Write informative/explanatory texts to examine and convey complex ideas and information clearly and accurately through the effective selection, organization, and analysis of content.

CCRA.W.6 Use technology, including the Internet, to produce and publish writing and to interact and collaborate with others.

Research to Build and Present Knowledge

CCRA.W.7 Conduct short as well as more sustained research projects based on focused questions, demonstrating understanding of the subject under investigation.

CCRA.W.8 Gather relevant information from multiple print and digital sources, assess the credibility and accuracy of each source, and integrate the information while avoiding plagiarism.

CCRA.W.9 Draw evidence from literary or informational texts to support analysis, reflection, and research.

Range of Writing

CCRA.W.10 Write routinely over extended time frames (time for research, reflection, and revision) and shorter time frames (a single sitting or a day or two) for a range of tasks, purposes, and audiences

***These broad types of writing include many subgenres. See Appendix A for definitions of key writing types.*

Note on range and content of student writing

For students, writing is a key means of asserting and defending claims, showing what they know about a subject, and conveying what they have experienced, imagined, thought, and felt. To be college- and career- ready writers, students must take task, purpose, and audience into careful consideration, choosing words, information, structures, and formats deliberately. They need to know how to combine elements of different kinds of writing—for example, to use narrative strategies within argument and explanation within narrative— to produce complex and nuanced writing. They need to be able to use technology strategically when creating, refining, and collaborating on writing. They have to become adept at gathering information, evaluating sources, and citing material accurately, reporting findings from their research and analysis of sources in a clear and cogent manner. They must have the flexibility, concentration, and fluency to produce high-quality first- draft text under a tight deadline as well as the capacity to revisit and make improvements to a piece of writing over multiple drafts when circumstances encourage or require it.

Writing Standards 6-12 W

The following standards for grades 6–12 offer a focus for instruction each year to help ensure that students gain adequate mastery of a range of skills and applications. Each year in their writing, students should demonstrate increasing sophistication in all aspects of language use, from vocabulary and syntax to the development and organization of ideas, and they should address increasingly demanding content and sources. *Students advancing through the grades are expected to meet each year's grade-specific standards and retain or further develop skills and understandings mastered in preceding grades.* The expected growth in student writing ability is reflected both in the standards themselves and in the collection of annotated student writing samples in Appendix C.

Grade 6 Students:	Grade 7 Students:	Grade 8 Students:
Text Types and Purposes		
W.6.1 Write arguments to support claims with clear reasons and relevant evidence. a. Introduce claim(s) and organize the reasons and evidence clearly. b. Support claim(s) with clear reasons and relevant evidence, using credible sources and demonstrating an understanding of the topic or text. c. Use words, phrases, and clauses to clarify the relationships among claim(s) and reasons. d. Use precise language and domain-specific vocabulary to support the argument. ~~d.~~e. Establish and maintain a formal style. ~~e.~~f. Provide a concluding statement or section that follows from the argument presented.	**W.7.1** Write arguments to support claims with clear reasons and relevant evidence. a. Introduce claim(s), acknowledge alternate or opposing claims, and organize the reasons and evidence logically. b. Support claim(s) with logical reasoning and relevant evidence, using accurate, credible sources and demonstrating an understanding of the topic or text. c. Use words, phrases, and clauses to create cohesion and clarify the relationships among claim(s), reasons, and evidence. d. Use precise language and domain-specific vocabulary to support the argument. ~~d.~~e. Establish and maintain a formal style. ~~e.~~f. Provide a concluding statement or section that follows from and supports the argument presented.	**W.8.1** Write arguments to support claims with clear reasons and relevant evidence. a. Introduce claim(s), acknowledge and distinguish the claim(s) from alternate or opposing claims, and organize the reasons and evidence logically. b. Support claim(s) with logical reasoning and relevant evidence, using accurate, credible sources and demonstrating an understanding of the topic or text. c. Use words, phrases, and clauses to create cohesion and clarify the relationships among claim(s), counterclaims, reasons, and evidence. d. Use precise language and domain-specific vocabulary to support the argument. ~~d.~~e. Establish and maintain a formal style. ~~e.~~f. Provide a concluding statement or section that follows from and supports the argument presented.
W.6.2 Write informative/explanatory texts to examine a topic and convey ideas, concepts, and information through the selection, organization, and analysis of relevant content. a. Introduce a topic; organize ideas, concepts, and information, using strategies such as definition, classification, comparison/contrast, and cause/effect; include formatting (e.g., headings), graphics (e.g., charts, tables), and multimedia when useful to aiding comprehension. b. Develop the topic with relevant facts, definitions, concrete details, quotations, or other information and examples. c. Use appropriate transitions to clarify the relationships among ideas and concepts. d. Use precise language and domain-specific vocabulary to inform about or explain the topic. e. Establish and maintain a formal style. f. Provide a concluding statement or section that follows from the information or explanation presented.	**W.7.2** Write informative/explanatory texts to examine a topic and convey ideas, concepts, and information through the selection, organization, and analysis of relevant content. a. Introduce a topic clearly, previewing what is to follow; organize ideas, concepts, and information, using strategies such as definition, classification, comparison/contrast, and cause/ effect; include formatting (e.g., headings), graphics (e.g., charts, tables), and multimedia when useful to aiding comprehension. b. Develop the topic with relevant facts, definitions, concrete details, quotations, or other information and examples. c. Use appropriate transitions to create cohesion and clarify the relationships among ideas and concepts. d. Use precise language and domain-specific vocabulary to inform about or explain the topic. e. Establish and maintain a formal style. f. Provide a concluding statement or section that follows from and supports the information or explanation presented.	**W.8.2** Write informative/explanatory texts to examine a topic and convey ideas, concepts, and information through the selection, organization, and analysis of relevant content. a. Introduce a topic clearly, previewing what is to follow; organize ideas, concepts, and information into broader categories; include formatting (e.g., headings), graphics (e.g., charts, tables), and multimedia when useful to aiding comprehension. b. Develop the topic with relevant, well-chosen facts, definitions, concrete details, quotations, or other information and examples. c. Use appropriate and varied transitions to create cohesion and clarify the relationships among ideas and concepts. d. Use precise language and domain-specific vocabulary to inform about or explain the topic. e. Establish and maintain a formal style. f. Provide a concluding statement or section that follows from and supports the information or explanation presented.

W.6.3 Write narratives to develop real or imagined experiences or events using effective technique, relevant descriptive details, and well-structured event sequences. a. Engage and orient the reader by establishing a context and introducing a narrator and/or characters; organize an event sequence that unfolds naturally and logically. b. Use narrative techniques, such as dialogue, pacing, and description, to develop experiences, events, and/or characters. c. Use a variety of transition words, phrases, and clauses to convey sequence and signal shifts from one time frame or setting to another. d. Use precise words and phrases, relevant descriptive details, and sensory language to convey experiences and events. e. Provide a conclusion that follows from the narrated experiences or events.	**W.7.3** Write narratives to develop real or imagined experiences or events using effective technique, relevant descriptive details, and well-structured event sequences. a. Engage and orient the reader by establishing a context and point of view and introducing a narrator and/or characters; organize an event sequence that unfolds naturally and logically. b. Use narrative techniques, such as dialogue, pacing, and description, to develop experiences, events, and/or characters. c. Use a variety of transition words, phrases, and clauses to convey sequence and signal shifts from one time frame or setting to another. d. Use precise words and phrases, relevant descriptive details, and sensory language to capture the action and convey experiences and events. e. Provide a conclusion that follows from and reflects on the narrated experiences or events.	**W.8.3** Write narratives to develop real or imagined experiences or events using effective technique, relevant descriptive details, and well-structured event sequences. a. Engage and orient the reader by establishing a context and point of view and introducing a narrator and/or characters; organize an event sequence that unfolds naturally and logically. b. Use narrative techniques, such as dialogue, pacing, description, and reflection, to develop experiences, events, and/or characters. c. Use a variety of transition words, phrases, and clauses to convey sequence, signal shifts from one time frame or setting to another, and show the relationships among experiences and events. d. Use precise words and phrases, relevant descriptive details, and sensory language to capture the action and convey experiences and events. e. Provide a conclusion that follows from and reflects on the narrated experiences or events.
Production and Distribution of Writing		
W.6.4 Produce clear and coherent writing in which the development, organization, and style are appropriate to task, purpose, and audience. (Grade-specific expectations for writing types are defined in standards 1–3 above.)	**W.7.4** Produce clear and coherent writing in which the development, organization, and style are appropriate to task, purpose, and audience. (Grade-specific expectations for writing types are defined in standards 1–3 above.)	**W.8.4** Produce clear and coherent writing in which the development, organization, and style are appropriate to task, purpose, and audience. (Grade-specific expectations for writing types are defined in standards 1–3 above.)
W.6.5 With some guidance and support from peers and adults, develop and strengthen writing as needed by planning, revising, editing, rewriting, or trying a new approach. (Editing for conventions should demonstrate command of Language standards 1–3 up to and including grade 6.)	**W.7.5** With some guidance and support from peers and adults, develop and strengthen writing as needed by planning, revising, editing, rewriting, or trying a new approach, focusing on how well purpose and audience have been addressed. (Editing for conventions should demonstrate command of Language standards 1–3 up to and including grade 7.)	**W.8.5** With some guidance and support from peers and adults, develop and strengthen writing as needed by planning, revising, editing, rewriting, or trying a new approach, focusing on how well purpose and audience have been addressed. (Editing for conventions should demonstrate command of Language standards 1–3 up to and including grade 8.)
RI.6.6 Use technology, including the Internet, to produce and publish writing as well as to interact and collaborate with others; demonstrate sufficient command of keyboarding skills to type a minimum of three pages in a single sitting.	**W.7.6** Use technology, including the Internet, to produce and publish writing and link to and cite sources as well as to interact and collaborate with others, including linking to and citing sources.	**W.8.6** Use technology, including the Internet, to produce and publish writing and present the relationships between information and ideas efficiently as well as to interact and collaborate with others.
Research to Build and Present Knowledge		
W.6.7 Conduct short research projects to answer a question, drawing on several sources and refocusing the inquiry when appropriate.	**W.7.7** Compare and contrast a text to an audio, video, or multimedia version of the text, analyzing each medium's portrayal of the subject (e.g., how the delivery of a speech affects the impact of the words).	**W.8.7** Evaluate the advantages and disadvantages of using different mediums (e.g., print or digital text, video, multimedia) to present a particular topic or idea.
W.6.8 Gather relevant information from multiple print and digital sources; assess the credibility of each source; and quote or paraphrase the data and conclusions of others while avoiding plagiarism and providing basic bibliographic information for	**W.7.8** Trace and evaluate the argument and specific claims in a text, assessing whether the reasoning is sound and the evidence is relevant and sufficient to support the claims.	**W.8.8** Delineate and evaluate the argument and specific claims in a text, assessing whether the reasoning is sound and the evidence is relevant and sufficient; recognize when irrelevant evidence is introduced.

sources.		
W.6.9 Draw evidence from literary or informational texts to support analysis, reflection, and research. a. Apply grade 6 Reading standards to literature (e.g., "Compare and contrast texts in different forms or genres [e.g., stories and poems; historical novels and fantasy stories] in terms of their approaches to similar themes and topics"). b. Apply grade 6 Reading standards to literary nonfiction (e.g., "Trace and evaluate the argument and specific claims in a text, distinguishing claims that are supported by reasons and evidence from claims that are not").	**W.7.9** Draw evidence from literary or informational texts to support analysis, reflection, and research. a. Apply grade 7 Reading standards to literature (e.g., "Compare and contrast a fictional portrayal of a time, place, or character and a historical account of the same period as a means of understanding how authors of fiction use or alter history"). b. Apply grade 7 Reading standards to literary nonfiction (e.g. "Trace and evaluate the argument and specific claims in a text, assessing whether the reasoning is sound and the evidence is relevant and sufficient to support the claims").	**W.8.9** Draw evidence from literary or informational texts to support analysis, reflection, and research. a. Apply grade 8 Reading standards to literature (e.g., "Analyze how a modern work of fiction draws on themes, patterns of events, or character types from myths, traditional stories, or religious works such as the Bible, including describing how the material is rendered new"). b. Apply grade 8 Reading standards to literary nonfiction (e.g., "Delineate and evaluate the argument and specific claims in a text, assessing whether the reasoning is sound and the evidence is relevant and sufficient; recognize when irrelevant evidence is introduced").
Range of Writing		
W.6.10 Write routinely over extended time frames (time for research, reflection, and revision) and shorter time frames (a single sitting or a day or two) for a range of discipline-specific tasks, purposes, and audiences.	**W.7.10** Write routinely over extended time frames (time for research, reflection, and revision) and shorter time frames (a single sitting or a day or two) for a range of discipline-specific tasks, purposes, and audiences.	**W.6.10** Write routinely over extended time frames (time for research, reflection, and revision) and shorter time frames (a single sitting or a day or two) for a range of discipline-specific tasks, purposes, and audiences.

Writing Standards 6-12 W

The CCR anchor standards and high school grade-specific standards work in tandem to define college and career readiness expectations—the former providing broad standards, the latter providing additional specificity.

Grades 9-10 Students:	Grade 11-12 Students:
Text Types and Purposes	
W.9-10.1 Write arguments to support claims in an analysis of substantive topics or texts, using valid reasoning and relevant and sufficient evidence. a. Introduce precise claim(s), distinguish the claim(s) from alternate or opposing claims, and create an organization that establishes clear relationships among claim(s), counterclaims, reasons, and evidence. b. Develop claim(s) and counterclaims fairly, supplying evidence for each while pointing out the strengths and limitations of both in a manner that anticipates the audience's knowledge level and concerns. c. Use words, phrases, and clauses to link the major sections of the text, create cohesion, and clarify the relationships between claim(s) and reasons, between reasons and evidence, and between claim(s) and counterclaims. d. Use precise language and domain-specific vocabulary to manage the complexity of the argument. ~~d.~~e. Establish and maintain a formal style and objective tone while attending to the norms and conventions of the discipline in which they are writing. ~~e.~~f. Provide a concluding statement or section that follows from and supports the argument presented.	**W.11-12.1** Write arguments to support claims in an analysis of substantive topics or texts, using valid reasoning and relevant and sufficient evidence. a. Introduce precise, knowledgeable claim(s), establish the significance of the claim(s), distinguish the claim(s) from alternate or opposing claims, and create an organization that logically sequences claim(s), counterclaims, reasons, and evidence. b. Develop claim(s) and counterclaims fairly and thoroughly, supplying the most relevant evidence for each while pointing out the strengths and limitations of both in a manner that anticipates the audience's knowledge level, concerns, values, and possible biases. c. Use words, phrases, and clauses as well as varied syntax to link the major sections of the text, create cohesion, and clarify the relationships between claim(s) and reasons, between reasons and evidence, and between claim(s) and counterclaims. d. Use precise language, domain-specific vocabulary, and techniques such as metaphor, simile and analogy to manage the complexity of the argument. ~~d.~~e. Establish and maintain a formal style and objective tone while attending to the norms and conventions of the discipline in which they are writing. ~~e.~~f. Provide a concluding statement or section that follows from and supports the argument presented.
W.9-10.2 Write informative/explanatory texts to examine and convey complex ideas, concepts, and information clearly and accurately through the effective selection, organization, and analysis of content. a. Introduce a topic; organize complex ideas, concepts, and information to make important connections and distinctions; include formatting (e.g., headings), graphics (e.g., figures, tables), and multimedia when useful to aiding comprehension. b. Develop the topic with well-chosen, relevant, and sufficient facts, extended definitions, concrete details, quotations, or other information and examples appropriate to the audience's knowledge of the topic. c. Use appropriate and varied transitions to link the major sections of the text, create cohesion, and clarify the relationships among complex ideas and concepts. d. Use precise language and domain-specific vocabulary to manage the complexity of the topic. e. Establish and maintain a formal style and objective tone while attending to the norms and conventions of the discipline in which they are writing. f. Provide a concluding statement or section that follows from and supports the information or explanation presented (e.g., articulating implications or the significance of the topic).	**W.11-12.2** Write informative/explanatory texts to examine and convey complex ideas, concepts, and information clearly and accurately through the effective selection, organization, and analysis of content. a. Introduce a topic; organize complex ideas, concepts, and information so that each new element builds on that which precedes it to create a unified whole; include formatting (e.g., headings), graphics (e.g., figures, tables), and multimedia when useful to aiding comprehension. b. Develop the topic thoroughly by selecting the most significant and relevant facts, extended definitions, concrete details, quotations, or other information and examples appropriate to the audience's knowledge of the topic. c. Use appropriate and varied transitions and syntax to link the major sections of the text, create cohesion, and clarify the relationships among complex ideas and concepts. d. Use precise language, domain-specific vocabulary, and techniques such as metaphor, simile, and analogy to manage the complexity of the topic. e. Establish and maintain a formal style and objective tone while attending to the norms and conventions of the discipline in which they are writing. f. Provide a concluding statement or section that follows from and supports the information or explanation presented (e.g., articulating implications or the significance of the topic).
W.9-10.3 Write narratives to develop real or imagined experiences or events using effective technique, well-chosen details, and well-structured event sequences. a. Engage and orient the reader by setting out a problem, situation, or observation,	W.11-12.3 Write narratives to develop real or imagined experiences or events using effective technique, well-chosen details, and well-structured event sequences. a. Engage and orient the reader by setting out a problem, situation, or observation and its

establishing one or multiple point(s) of view, and introducing a narrator and/or characters; create a smooth progression of experiences or events. b. Use narrative techniques, such as dialogue, pacing, description, reflection, and multiple plot lines, to develop experiences, events, and/or characters. c. Use a variety of techniques to sequence events so that they build on one another to create a coherent whole. d. Use precise words and phrases, telling details, and sensory language to convey a vivid picture of the experiences, events, setting, and/or characters. e. Provide a conclusion that follows from and reflects on what is experienced, observed, or resolved over the course of the narrative.	significance, establishing one or multiple point(s) of view, and introducing a narrator and/or characters; create a smooth progression of experiences or events. b. Use narrative techniques, such as dialogue, pacing, description, reflection, and multiple plot lines, to develop experiences, events, and/or characters. c. Use a variety of techniques to sequence events so that they build on one another to create a coherent whole and build toward a particular tone and outcome (e.g., a sense of mystery, suspense, growth, or resolution). d. Use precise words and phrases, telling details, and sensory language to convey a vivid picture of the experiences, events, setting, and/or characters. e. Provide a conclusion that follows from and reflects on what is experienced, observed, or resolved over the course of the narrative.
Production and Distribution of Writing	
W.9-10.4 Produce clear and coherent writing in which the development, organization, and style are appropriate to task, purpose, and audience. (Grade-specific expectations for writing types are defined in standards 1–3 above.)	**W.11-12.4** Produce clear and coherent writing in which the development, organization, and style are appropriate to task, purpose, and audience. (Grade-specific expectations for writing types are defined in standards 1–3 above.)
W.9-10.5 Develop and strengthen writing as needed by planning, revising, editing, rewriting, or trying a new approach, focusing on addressing what is most significant for a specific purpose and audience. (Editing for conventions should demonstrate command of Language standards 1–3 up to and including grades 9–10.)	**W.11-12.5** Develop and strengthen writing as needed by planning, revising, editing, rewriting, or trying a new approach, focusing on addressing what is most significant for a specific purpose and audience. (Editing for conventions should demonstrate command of Language standards 1–3 up to and including grades 11–12.)
W.9-10.6 Use technology, including the Internet, to produce, publish, and update individual or shared writing products, taking advantage of technology's capacity to link to other information and to display information flexibly and dynamically.	**W.11-12.6** Use technology, including the Internet, to produce, publish, and update individual or shared writing products in response to ongoing feedback, including new arguments or information.
Research to Build and Present Knowledge	
W.9-10.7 Conduct short as well as more sustained research projects to answer a question (including a self-generated question) or solve a problem; narrow or broaden the inquiry when appropriate; synthesize multiple sources on the subject, demonstrating understanding of the subject under investigation.	**W.11-12.7** Conduct short as well as more sustained research projects to answer a question (including a self-generated question) or solve a problem; narrow or broaden the inquiry when appropriate; synthesize multiple sources on the subject, demonstrating understanding of the subject under investigation.
W.9-10.8 Gather relevant information from multiple authoritative print and digital sources, using advanced searches effectively; assess the usefulness of each source in answering the research question; integrate information into the text selectively to maintain the flow of ideas, avoiding plagiarism and following a standard format for citation.	**W.11-12.8** Gather relevant information from multiple authoritative print and digital sources, using advanced searches effectively; assess the strengths and limitations of each source in terms of the task, purpose, and audience; integrate information into the text selectively to maintain the flow of ideas, avoiding plagiarism and overreliance on any one source and following a standard format for citation.
W.9-10.9 Draw evidence from literary or informational texts to support analysis, reflection, and research. a. Apply grades 9–10 Reading standards to literature (e.g., "Analyze how an author draws on and transforms source material in a specific work [e.g., how Shakespeare treats a theme or topic from Ovid or the Bible or how a later author draws on a play by Shakespeare]"). b. Apply grades 9–10 Reading standards to literary nonfiction (e.g., "Delineate and evaluate the argument and specific claims in a text, assessing whether the reasoning is valid and the evidence is relevant and sufficient; identify false statements and fallacious reasoning").	**W.11-12.9** Draw evidence from literary or informational texts to support analysis, reflection, and research. a. Apply grades 11–12 Reading standards to literature (e.g., "Demonstrate knowledge of eighteenth-, nineteenth- and early-twentieth-century foundational works of American literature, including how two or more texts from the same period treat similar themes or topics"). b. Apply grades 11–12 Reading standards to literary nonfiction (e.g., "Delineate and evaluate the reasoning in seminal U.S. texts, including the application of constitutional principles and use of legal reasoning [e.g., in U.S. Supreme c. Court Case majority opinions and dissents] and the premises, purposes, and arguments in works of public advocacy [e.g., The Federalist, presidential addresses]").
Range of Writing	

W.9-10.10 Write routinely over extended time frames (time for research, reflection, and revision) and shorter time frames (a single sitting or a day or two) for a range of tasks, purposes, and audiences.	**W.11-12.10** Write routinely over extended time frames (time for research, reflection, and revision) and shorter time frames (a single sitting or a day or two) for a range of tasks, purposes, and audiences.

College and Career Readiness Anchor Standards for Speaking and Listening

The grades 6–12 standards on the following pages define what students should understand and be able to do by the end of each grade. They correspond to the College and Career Readiness (CCR) anchor standards below by number. The CCR and grade-specific standards are necessary complements—the former providing broad standards, the latter providing additional specificity—that together define the skills and understandings that all students must demonstrate.

Comprehension and Collaboration

CCRA.SL.1 Prepare for and participate effectively in a range of conversations and collaborations with diverse partners, building on others' ideas and expressing their own clearly and persuasively.

CCRA.SL.2 Integrate and evaluate information presented in diverse media and formats, including visually, quantitatively, and orally.

CCRA.SL.3 Evaluate a speaker's point of view, reasoning, and use of evidence and rhetoric.

Presentation of Knowledge and Ideas

CCRA.SL.4 Present information, findings, and supporting evidence such that listeners can follow the line of reasoning and the organization, development, and style are appropriate to task, purpose, and audience.

CCRA.SL.5 Make strategic use of digital media and visual displays of data to express information and enhance understanding of presentations.

CCRA.SL.6 Adapt speech to a variety of contexts and communicative tasks, demonstrating command of formal English when indicated or appropriate.

***These broad types of writing include many subgenres. See Appendix A for definitions of key writing types.*

Note on range and content of student speaking and listening

To become college and career ready, students must have ample opportunities to take part in a variety of rich, structured conversations—as part of a whole class, in small groups, and with a partner—built around important content in various domains. They must be able to contribute appropriately to these conversations, to make comparisons and contrasts, and to analyze and synthesize a multitude of ideas in accordance with the standards of evidence appropriate to a particular discipline. Whatever their intended major or profession, high school graduates will depend heavily on their ability to listen attentively to others so that they are able to build on others' meritorious ideas while expressing their own clearly and persuasively. New technologies have broadened and expanded the role that speaking and listening play in acquiring and sharing knowledge and have tightened their link to other forms of communication. The Internet has accelerated the speed at which connections between speaking, listening, reading, and writing can be made, requiring that students be ready to use these modalities nearly simultaneously. Technology itself is changing quickly, creating a new urgency for students to be adaptable in response to change.

Speaking and Listening Standards 6-12 SL

The following standards for grades 6–12 offer a focus for instruction in each year to help ensure that students gain adequate mastery of a range of skills and applications. Students advancing through the grades are expected to meet each year's grade-specific standards and retain or further develop skills and understandings mastered in preceding grades.

Grade 6 Students:	Grade 7 Students:	Grade 8 Students:
Comprehension and Collaboration		
SL.6.1 Engage effectively in a range of collaborative discussions (one-on-one, in groups, and teacher-led) with diverse partners on grade 6 topics, texts, and issues, building on others' ideas and expressing their own clearly. a. Come to discussions prepared, having read or studied required material; explicitly draw on that preparation by referring to evidence on the topic, text, or issue to probe and reflect on ideas under discussion. b. Follow rules for collegial discussions, set specific goals and deadlines, and define individual roles as needed. c. Pose and respond to specific questions with elaboration and detail by making comments that contribute to the topic, text, or issue under discussion. d. Review the key ideas expressed and demonstrate understanding of multiple perspectives through reflection and paraphrasing.	**SL.7.1** Engage effectively in a range of collaborative discussions (one-on-one, in groups, and teacher-led) with diverse partners on grade 7 topics, texts, and issues, building on others' ideas and expressing their own clearly. a) Come to discussions prepared, having read or researched material under study; explicitly draw on that preparation by referring to evidence on the topic, text, or issue to probe and reflect on ideas under discussion. b) Follow rules for collegial discussions, track progress toward specific goals and deadlines, and define individual roles as needed. c) Pose questions that elicit elaboration and respond to others' questions and comments with relevant observations and ideas that bring the discussion back on topic as needed. d) Acknowledge new information expressed by others and, when warranted, modify their own views.	**SL.8.1** Engage effectively in a range of collaborative discussions (one-on-one, in groups, and teacher-led) with diverse partners on grade 8 topics, texts, and issues, building on others' ideas and expressing their own clearly. a. Come to discussions prepared, having read or researched material under study; explicitly draw on that preparation by referring to evidence on the topic, text, or issue to probe and reflect on ideas under discussion. b. Follow rules for collegial discussions and decision-making, track progress toward specific goals and deadlines, and define individual roles as needed. c. Pose questions that connect the ideas of several speakers and respond to others' questions and comments with relevant evidence, observations, and ideas. d. Acknowledge new information expressed by others, and, when warranted, qualify or justify their own views in light of the evidence presented.
SL.6.2 Interpret information presented in diverse media and formats (e.g., visually, quantitatively, orally) and explain how it contributes to a topic, text, or issue under study.	**SL.7.2** Analyze the main ideas and supporting details presented in diverse media and formats (e.g., visually, quantitatively, orally) and explain how the ideas clarify a topic, text, or issue under study.	**SL.8.2** Delineate a speaker's argument and specific claims, evaluating the soundness of the reasoning and the relevance and sufficiency of the evidence.
SL.6.3 Delineate a speaker's argument and specific claims, distinguishing claims that are supported by reasons and evidence from claims that are not.	**SL.7.3** Delineate a speaker's argument and specific claims, evaluating the soundness of the reasoning and the relevance and sufficiency of the evidence.	**SL.8.3** Delineate a speaker's argument and specific claims, evaluating the soundness of the reasoning and relevance and sufficiency of the evidence and identifying when irrelevant evidence is introduced.
Presentation of Knowledge and Ideas		
SL.6.4 Present claims and findings, sequencing ideas logically and using pertinent descriptions, facts, and details to accentuate main ideas or themes; use appropriate eye contact, adequate volume, and clear pronunciation.	**SL.7.4** Present claims and findings, emphasizing salient points in a focused, coherent manner with pertinent descriptions, facts, details, and examples; use appropriate eye contact, adequate volume, and clear pronunciation.	**SL.7.4** Present claims and findings, emphasizing salient points in a focused, coherent manner with relevant evidence, sound valid reasoning, and well-chosen details; use appropriate eye contact, adequate volume, and clear pronunciation.

SL.6.5 Include multimedia components (e.g., graphics, images, music, sound) and visual displays in presentations to clarify information.	**SL.7.5** Include multimedia components and visual displays in presentations to clarify claims and findings and emphasize salient points.	**SL.8.5** Integrate multimedia and visual displays into presentations to clarify information, strengthen claims and evidence, and add interest.
SL.6.6 Adapt speech to a variety of contexts and tasks, demonstrating command of formal English when indicated or appropriate. (See grade 6 Language standards 1 and 3 for specific expectations.)	**SL.7.6** Adapt speech to a variety of contexts and tasks, demonstrating command of formal English when indicated or appropriate. (See grade 7 Language standards 1 and 3 for specific expectations.)	**SL.8.6** Adapt speech to a variety of contexts and tasks, demonstrating command of formal English when indicated or appropriate. (See grade 8 Language standards 1 and 3 for specific expectations.)

Speaking and Listening Standards 6-12 SL

The CCR anchor standards and high school grade-specific standards work in tandem to define college and career readiness expectations—the former providing broad standards, the latter providing additional specificity.

Grades 9-10 Students:	Grade 11-12 Students:
Comprehension and Collaboration	
SL.9-10.1 Initiate and participate effectively in a range of collaborative discussions (one-on-one, in groups, and teacher-led) with diverse partners on grades 9–10 topics, texts, and issues, building on others' ideas and expressing their own clearly and persuasively. a. Come to discussions prepared, having read and researched material under study; explicitly draw on that preparation by referring to evidence from texts and other research on the topic or issue to stimulate a thoughtful, well-reasoned exchange of ideas. b. Work with peers to set rules for collegial discussions and decision-making (e.g., informal consensus, taking votes on key issues, presentation of alternate views), clear goals and deadlines, and individual roles as needed. c. Propel conversations by posing and responding to questions that relate the current discussion to broader themes or larger ideas; actively incorporate others into the discussion; and clarify, verify, or challenge ideas and conclusions. d. Respond thoughtfully to diverse perspectives, summarize points of agreement and disagreement, and, when warranted, qualify or justify their own views and understanding and make new connections in light of the evidence and reasoning presented	**SL.11-12.1** Initiate and participate effectively in a range of collaborative discussions (one- on-one, in groups, and teacher-led) with diverse partners on grades 11–12 topics, texts, and issues, building on others' ideas and expressing their own clearly and persuasively. a. Come to discussions prepared, having read and researched material under study; explicitly draw on that preparation by referring to evidence from texts and other research on the topic or issue to stimulate a thoughtful, well- reasoned exchange of ideas. b. Work with peers to promote civil, democratic discussions and decision- making, set clear goals and deadlines, and establish individual roles as needed. c. Propel conversations by posing and responding to questions that probe reasoning and evidence; ensure a hearing for a full range of positions on a topic or issue; clarify, verify, or challenge ideas and conclusions; and promote divergent and creative perspectives. d. Respond thoughtfully to diverse perspectives; synthesize comments, claims, and evidence made on all sides of an issue; resolve contradictions when possible; and determine what additional information or research is required to deepen the investigation or complete the task.
SL.9-10.2 Integrate multiple sources of information presented in diverse media or formats (e.g., visually, quantitatively, orally) evaluating the credibility and accuracy of each source.	**SL.11-12.2** Integrate multiple sources of information presented in diverse formats and media (e.g., visually, quantitatively, orally) in order to make informed decisions and solve problems, evaluating the credibility and accuracy of each source and noting any discrepancies among the data.
SL.9-10.3 Evaluate a speaker's point of view, reasoning, and use of evidence and rhetoric, identifying any fallacious reasoning or exaggerated or distorted evidence.	**SL.11-12.3** Evaluate a speaker's point of view, reasoning, and use of evidence and rhetoric, assessing the stance, premises, links among ideas, word choice, points of emphasis, and tone used.
Presentation of Knowledge and Ideas	
SL.9-10.4 Present information, findings, and supporting evidence clearly, concisely, and logically such that listeners can follow the line of reasoning and the organization, development, substance, and style are appropriate to purpose, audience, and task.	**SL.11-12.4** Produce clear and coherent writing in which the development, organization, and style are appropriate to task, purpose, and audience. (Grade-specific expectations for writing types are defined in standards 1–3 above.)
SL.9-10.5 Make strategic use of digital media (e.g., textual, graphical, audio, visual, and interactive elements) in presentations to enhance understanding of findings, reasoning, and evidence and to add interest.	**SL.11-12.5** Make strategic use of digital media (e.g., textual, graphical, audio, visual, and interactive elements) in presentations to enhance understanding of findings, reasoning, and evidence and to add interest.
SL.9-10.6 Adapt speech to a variety of contexts and tasks, demonstrating command of formal English when indicated or appropriate. (See grades 9–10 Language standards 1 and 3 for specific expectations.)	**SL.11-12.6** Adapt speech to a variety of contexts and tasks, demonstrating a command of formal English when indicated or appropriate. (See grades 11–12 Language standards 1 and 3 for specific expectations.)

College and Career Readiness Anchor Standards for Language

The grades 6–12 standards on the following pages define what students should understand and be able to do by the end of each grade. They correspond to the College and Career Readiness (CCR) anchor standards below by number. The CCR and grade-specific standards are necessary complements—the former providing broad standards, the latter providing additional specificity—that together define the skills and understandings that all students must demonstrate.

<u>**Conventions of Standard English**</u>

CCRA.L.1 Demonstrate command of the conventions of standard English grammar and usage when writing or speaking.

CCRA.L.2 Demonstrate command of the conventions of standard English capitalization, punctuation, and spelling when writing.

<u>**Knowledge of Language**</u>

CCRA.L.3 Apply knowledge of language to understand how language functions in different contexts, to make effective choices for meaning or style, and to comprehend more fully when reading or listening.

<u>**Vocabulary acquisition and Use**</u>

CCRA.L.4 Determine or clarify the meaning of unknown and multiple-meaning words and phrases by using context clues, analyzing meaningful word parts, and consulting general and specialized reference materials, as appropriate.

CCRA.L.5 Demonstrate understanding of figurative language, word relationships, and nuances in word meanings.

CCRA.L.6 Acquire and use accurately a range of general academic and domain-specific words and phrases sufficient for reading, writing, speaking, and listening at the college and career readiness level; demonstrate independence in gathering vocabulary knowledge when encountering an unknown term important to comprehension or expression.

Note on range and content of student language use

To be college and career ready in language, students must have firm control over the conventions of standard English. At the same time, they must come to appreciate that language is as at least as much a matter of craft as of rules and be able to choose words, syntax, and punctuation to express themselves and achieve particular functions and rhetorical effects. They must also have extensive vocabularies, built through reading and study, enabling them to comprehend complex texts and engage in purposeful writing about and conversations around content. They need to become skilled in determining or clarifying the meaning of words and phrases they encounter, choosing flexibly from an array of strategies to aid them. They must learn to see an individual word as part of a network of other words—words, for example, that have similar denotations but different connotations. The inclusion of Language standards in their own strand should not be taken as an indication that skills related to conventions, effective language use, and vocabulary are unimportant to reading, writing, speaking, and listening; indeed, they are inseparable from such contexts.

Language Standards 6-12 L

The following standards for grades 6–12 offer a focus for instruction each year to help ensure that students gain adequate mastery of a range of skills and applications. Students advancing through the grades are expected to meet each year's grade-specific standards and retain or further develop skills and understandings mastered in preceding grades. Beginning in grade 3, skills and understandings that are particularly likely to require continued attention in higher grades as they are applied to increasingly sophisticated writing and speaking are marked with an asterisk (*). See the table on page 56 for a complete listing and Appendix A for an example of how these skills develop in sophistication.

Grade 6 Students:	Grade 7 Students:	Grade 8 Students:
Conventions of Standard English		
L.6.1 Demonstrate command of the conventions of standard English grammar and usage when writing or speaking. a. Ensure that pronouns are in the proper case (subjective, objective, possessive). b. Use intensive pronouns (e.g., myself, ourselves). c. Recognize and correct inappropriate shifts in pronoun number and person.* d. Recognize and correct vague pronouns (i.e., ones with unclear or ambiguous antecedents).* e. Recognize variations from standard English in their own and others' writing and speaking, and identify and use strategies to improve expression in conventional language.*	**L.7.1** Demonstrate command of the conventions of standard English grammar and usage when writing or speaking. a. Explain the function of phrases and clauses in general and their function in specific sentences. a. Choose among simple, compound, complex, and compound-complex sentences to signal differing relationships among ideas. b. Place phrases and clauses within a sentence, recognizing and correcting misplaced and dangling modifiers.*	**L.8.1** Demonstrate command of the conventions of standard English grammar and usage when writing or speaking. a. Explain the function of verbals (gerunds, participles, infinitives) in general and their function in particular sentences. b. Form and use verbs in the active and passive voice. c. Form and use verbs in the indicative, imperative, interrogative, conditional, and subjunctive mood. d. Recognize and correct inappropriate shifts in verb voice and mood.*
L.6.2 Demonstrate command of the conventions of standard English capitalization, punctuation, and spelling when writing. a. Use punctuation (commas, parentheses, dashes) to set off nonrestrictive/parenthetical elements.* b. Spell correctly.	**L.7.2** Demonstrate command of the conventions of standard English capitalization, punctuation, and spelling when writing. a. Use a comma to separate coordinate adjectives (e.g., It was a fascinating, enjoyable movie but not He wore an old[,] green shirt) b. Spell correctly.	**L.8.2** Demonstrate command of the conventions of standard English capitalization, punctuation, and spelling when writing. a. Use punctuation (comma, ellipsis, dash) to indicate a pause or break. b. Use an ellipsis to indicate an omission. c. Spell correctly.
Knowledge of Language		
L.6.3 Use knowledge of language and its conventions when writing, speaking, reading, or listening. a. Vary sentence patterns for meaning, reader/ listener interest, and style.* b. Maintain consistency in style and tone.*	**L.7.3** Use knowledge of language and its conventions when writing, speaking, reading, or listening. a. Choose language that expresses ideas precisely and concisely, recognizing and eliminating wordiness and redundancy.*	**L.8.3** Use knowledge of language and its conventions when writing, speaking, reading, or listening. a. Use verbs in the active and passive voice and in the conditional and subjunctive mood to achieve particular effects (e.g., emphasizing the actor or the action; expressing uncertainty or describing a state contrary to fact).
Vocabulary Acquisition and Use		
L.6.4 Determine or clarify the meaning of unknown and multiple-meaning words and phrases based on grade 6 reading and content, choosing flexibly from a range of strategies. a. Use context (e.g., the overall meaning of a sentence or paragraph; a word's position or function in a	**L.7.4** Determine or clarify the meaning of unknown and multiple-meaning words and phrases based on grade 7 reading and content, choosing flexibly from a range of strategies. a. Use context (e.g., the overall meaning of a sentence or paragraph; a word's position or function in a	**L.8.4** Determine or clarify the meaning of unknown and multiple-meaning words or phrases based on grade 8 reading and content, choosing flexibly from a range of strategies. a. Use context (e.g., the overall meaning of a sentence or paragraph; a word's position or function in a

sentence) as a clue to the meaning of a word or phrase. b. Use common, grade-appropriate Greek or Latin affixes and roots as clues to the meaning of a word (e.g., audience, auditory, audible). c. Consult reference materials (e.g., dictionaries, glossaries, thesauruses), both print and digital, to find the pronunciation of a word or determine or clarify its precise meaning or its part of speech. d. Verify the preliminary determination of the meaning of a word or phrase (e.g., by checking the inferred meaning in context or in a dictionary).	sentence) as a clue to the meaning of a word or phrase. b. Use common, grade-appropriate Greek or Latin affixes and roots as clues to the meaning of a word (e.g., belligerent, bellicose, rebel). c. Consult general and specialized reference materials (e.g., dictionaries, glossaries, thesauruses), both print and digital, to find the pronunciation of a word or determine or clarify its precise meaning or its part of speech. d. Verify the preliminary determination of the meaning of a word or phrase (e.g., by checking the inferred meaning in context or in a dictionary).	sentence) as a clue to the meaning of a word or phrase. b. Use common, grade-appropriate Greek or Latin affixes and roots as clues to the meaning of a word (e.g., precede, recede, secede). c. Consult general and specialized reference materials (e.g., dictionaries, glossaries, thesauruses), both print and digital, to find the pronunciation of a word or determine or clarify its precise meaning or its part of speech. d. Verify the preliminary determination of the meaning of a word or phrase (e.g., by checking the inferred meaning in context or in a dictionary).
L.6.5 Demonstrate understanding of figurative language, word relationships, and nuances in word meanings. a. Interpret figures of speech (e.g., personification) in context. b. Use the relationship between particular words (e.g., cause/effect, part/whole, item/category) to better understand each of the words. c. Distinguish among the connotations (associations) of words with similar denotations (definitions) (e.g., stingy, scrimping, economical, unwasteful, thrifty).	**L.7.5** Demonstrate understanding of figurative language, word relationships, and nuances in word meanings. a. Interpret figures of speech (e.g., literary, biblical, and mythological allusions) in context. b. Use the relationship between particular words (e.g., synonym/antonym, analogy) to better understand each of the words. c. Distinguish among the connotations (associations) of words with similar denotations (definitions) (e.g., refined, respectful, polite, diplomatic, condescending).	**L.8.5** Demonstrate understanding of figurative language, word relationships, and nuances in word meanings. a. Interpret figures of speech (e.g. verbal irony, puns) in context. b. Use the relationship between particular words to better understand each of the words. c. Distinguish among the connotations (associations) of words with similar denotations (definitions) (e.g., bullheaded, willful, firm, persistent, resolute).
L.6.6 Acquire and use accurately grade-appropriate general academic and domain-specific words and phrases; gather vocabulary knowledge when considering a word or phrase important to comprehension or expression.	**L.7.6** Acquire and use accurately grade-appropriate general academic and domain-specific words and phrases; gather vocabulary knowledge when considering a word or phrase important to comprehension or expression.	**L.8.6** Acquire and use accurately grade-appropriate general academic and domain-specific words and phrases; gather vocabulary knowledge when considering a word or phrase important to comprehension or expression.

Language Standards 6-12 L

The CCR anchor standards and high school grade-specific standards work in tandem to define college and career readiness expectations—the former providing broad standards, the latter providing additional specificity.

Grades 9-10 Students:	Grade 11-12 Students:
Conventions of Standard English	
L.9-10.1 Demonstrate command of the conventions of standard English grammar and usage when writing or speaking. a. Use parallel structure.* b. Use various types of phrases (noun, verb, adjectival, adverbial, participial, prepositional, absolute) and clauses (independent, dependent; noun, relative, adverbial) to convey specific meanings and add variety and interest to writing or presentations.	**L.11-12.1** Demonstrate command of the conventions of standard English grammar and usage when writing or speaking. a. Apply the understanding that usage is a matter of convention, can change over time, and is sometimes contested. b. Resolve issues of complex or contested usage, consulting references (e.g., Merriam-Webster's Dictionary of English Usage, Garner's Modern American Usage) as needed.
L.9-10.2 Demonstrate command of the conventions of standard English capitalization, punctuation, and spelling when writing. a. Use a semicolon (and perhaps a conjunctive adverb) to link two or more closely related independent clauses. b. Use a colon to introduce a list or quotation c. Spell Correctly	**L.11-12.2** Demonstrate command of the conventions of standard English capitalization, punctuation, and spelling when writing. a. ~~Observe hyphenation conventions~~. Use hyphenation conventions. b. Spell correctly.
Knowledge of Language	
L.9-10.3 Apply knowledge of language to understand how language functions in different contexts, to make effective choices for meaning or style, and to comprehend more fully when reading or listening. a. Write and edit work so that it conforms to the guidelines in a style manual (e.g., MLA Handbook, Turabian's Manual for Writers) appropriate for the discipline and writing type.	L.11-12.3 Apply knowledge of language to understand how language functions in different contexts, to make effective choices for meaning or style, and to comprehend more fully when reading or listening. a. Vary syntax for effect, consulting references (e.g., Tufte's Artful Sentences) for guidance as needed; apply an understanding of syntax to the study of complex texts when reading.
Vocabulary Acquisition and Use	
L.9-10.4 Determine or clarify the meaning of unknown and multiple-meaning words and phrases based on grades 9–10 reading and content, choosing flexibly from a range of strategies. b. Use context (e.g., the overall meaning of a sentence, paragraph, or text; a word's position or function in a sentence) as a clue to the meaning of a word or phrase. c. Identify and correctly use patterns of word changes that indicate different meanings or parts of speech (e.g., analyze, analysis, analytical; advocate, advocacy). d. Consult general and specialized reference materials (e.g., dictionaries, glossaries, thesauruses), both print and digital, to find the pronunciation of a word or determine or clarify its precise meaning, its part of speech, or its etymology. e. Verify the preliminary determination of the meaning of a word or phrase (e.g., by checking the inferred meaning in context or in a dictionary).	**L.11-12.4** Determine or clarify the meaning of unknown and multiple-meaning words and phrases based on grades 11–12 reading and content, choosing flexibly from a range of strategies. a. Use context (e.g., the overall meaning of a sentence, paragraph, or text; a word's position or function in a sentence) as a clue to the meaning of a word or phrase. b. Identify and correctly use patterns of word changes that indicate different meanings or parts of speech (e.g., conceive, conception, conceivable). c. Consult general and specialized reference materials (e.g., dictionaries, glossaries, thesauruses), both print and digital, to find the pronunciation of a word or determine or clarify its precise meaning, its part of speech, its etymology, or its standard usage. d. Verify the preliminary determination of the meaning of a word or phrase (e.g., by checking the inferred meaning in context or in a dictionary).
L.9-10.5 Make strategic use of digital media (e.g., textual, graphical, audio, visual, and interactive elements) in presentations to enhance understanding of findings, reasoning, and evidence and to add interest.	**L.11-12.5** Make strategic use of digital media (e.g., textual, graphical, audio, visual, and interactive elements) in presentations to enhance understanding of findings, reasoning, and evidence and to add interest.

L.9-10.6 Acquire and use accurately general academic and domain-specific words and phrases, sufficient for reading, writing, speaking, and listening at the college and career readiness level; demonstrate independence in gathering vocabulary knowledge when considering a word or phrase important to comprehension or expression.	**L.11-12.6** Acquire and use accurately general academic and domain-specific words and phrases, sufficient for reading, writing, speaking, and listening at the college and career readiness level; demonstrate independence in gathering vocabulary knowledge when considering a word or phrase important to comprehension or expression.

Language Progressive Skills, by Grade

The following skills, marked with an asterisk (*) in Language standards 1–3, are particularly likely to require continued attention in higher grades as they are applied to increasingly sophisticated writing and speaking.

Standard	Grade(s)							
	3	4	5	6	7	8	9–10	11–12
L.3.1f. Ensure subject-verb and pronoun-antecedent agreement.								
L.3.3a. Choose words and phrases for effect.								
L.4.1f. Produce complete sentences, recognizing and correcting inappropriate fragments and run-ons.								
L.4.1g. Correctly use frequently confused words (e.g., *to/too/two; there/their*).								
L.4.3a. Choose words and phrases to convey ideas precisely.*								
L.4.3b. Choose punctuation for effect.								
L.5.1d. Recognize and correct inappropriate shifts in verb tense.								
L.5.2a. Use punctuation to separate items in a series.†								
L.6.1c. Recognize and correct inappropriate shifts in pronoun number and person.								
L.6.1d. Recognize and correct vague pronouns (i.e., ones with unclear or ambiguous antecedents).								
L.6.1e. Recognize variations from standard English in their own and others' writing and speaking, and identify and use strategies to improve expression in conventional language.								
L.6.2a. Use punctuation (commas, parentheses, dashes) to set off nonrestrictive/parenthetical elements.								
L.6.3a. Vary sentence patterns for meaning, reader/listener interest, and style.‡								
L.6.3b. Maintain consistency in style and tone.								
L.7.1c. Place phrases and clauses within a sentence, recognizing and correcting misplaced and dangling modifiers.								
L.7.3a. Choose language that expresses ideas precisely and concisely, recognizing and eliminating wordiness and redundancy.								
L.8.1d. Recognize and correct inappropriate shifts in verb voice and mood.								
L.9–10.1a. Use parallel structure.								

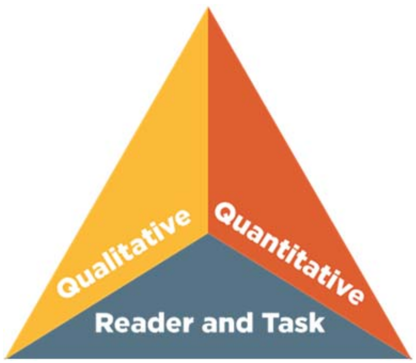
* Subsumed by L.7.3a

† Subsumed by L.9–10.1a

‡ Subsumed by L.11–12.3a

Standard 10: Range, Quality, and Complexity of Student Reading 6-12

Measuring Text Complexity: Three Factors



Qualitative evaluation of the text: Levels of meaning, structure, language conventionality and clarity, and knowledge demands

Quantitative evaluation of the text: Readability measures and other scores of text complexity

Matching reader to text and task: Reader variables (such as motivation, knowledge, and experiences) and task variables (such as purpose and the complexity generated by the task assigned and the questions posed)

Note: More detailed information on text complexity and how it is measured is contained in Appendix A.

Range of Text Types for 6-12

Students in K–5 apply the Reading standards to the following range of text types, with texts selected from a broad range of cultures and periods.

Literature			Informational Text
Stories	**Dramas**	**Poetry**	**Literary nonfiction and Historical, Scientific, and technical texts**
Includes the subgenres of adventure stories, historical fiction, mysteries, myths, science fiction, realistic fiction, allegories, parodies, satire, and graphic novels	Includes one-act and multi-act plays, both in written form and on film	Includes the subgenres of narrative poems, lyrical poems, free verse poems, sonnets, odes, ballads, and epics	Includes the subgenres of exposition, argument, and functional text in the form of personal essays, speeches, opinion pieces, essays about art or literature, biographies, memoirs, journalism, and historical, scientific, technical, or economic accounts (including digital sources) written for a broad audience

Texts Illustrating the Complexity, Quality, and Range of Student Reading 6-12

	Literature: Stories, Dramas, Poetry	Informational Texts: Literary Nonfiction
6–8	▪ *Little Women* by Louisa May Alcott (1869) ▪ *The Adventures of Tom Sawyer* by Mark Twain (1876) ▪ "The Road Not Taken" by Robert Frost (1915) ▪ *The Dark Is Rising* by Susan Cooper (1973) ▪ *Dragonwings* by Laurence Yep (1975) ▪ *Roll of Thunder, Hear My Cry* by Mildred Taylor (1976)	▪ "Letter on Thomas Jefferson" by John Adams (1776) ▪ *Narrative of the Life of Frederick Douglass, an American Slave* by Frederick Douglass (1845) ▪ "Blood, Toil, Tears and Sweat: Address to Parliament on May 13th, 1940" by Winston Churchill (1940) ▪ *Harriet Tubman: Conductor on the Underground Railroad* by Ann Petry (1955) ▪ *Travels with Charley: In Search of America* by John Steinbeck (1962)
9–10	▪ *The Tragedy of Macbeth* by William Shakespeare (1592) ▪ "Ozymandias" by Percy Bysshe Shelley (1817) ▪ "The Raven" by Edgar Allan Poe (1845) ▪ "The Gift of the Magi" by O. Henry (1906) ▪ *The Grapes of Wrath* by John Steinbeck (1939) ▪ *Fahrenheit 451* by Ray Bradbury (1953) ▪ *The Killer Angels* by Michael Shaara (1975)	▪ "Speech to the Second Virginia Convention" by Patrick Henry (1775) ▪ "Farewell Address" by George Washington (1796) ▪ "Gettysburg Address" by Abraham Lincoln (1863) ▪ "State of the Union Address" by Franklin Delano Roosevelt (1941) ▪ "Letter from Birmingham Jail" by Martin Luther King, Jr. (1964) ▪ "Hope, Despair and Memory" by Elie Wiesel (1997)
11–CCR	▪ "Ode on a Grecian Urn" by John Keats (1820) ▪ *Jane Eyre* by Charlotte Brontë (1848) ▪ "Because I Could Not Stop for Death" by Emily Dickinson (1890) ▪ *The Great Gatsby* by F. Scott Fitzgerald (1925) ▪ *Their Eyes Were Watching God* by Zora Neale Hurston (1937) ▪ *A Raisin in the Sun* by Lorraine Hansberry (1959) ▪ *The Namesake* by Jhumpa Lahiri (2003)	▪ *Common Sense* by Thomas Paine (1776) ▪ *Walden* by Henry David Thoreau (1854) ▪ "Society and Solitude" by Ralph Waldo Emerson (1857) ▪ "The Fallacy of Success" by G. K. Chesterton (1909) ▪ *Black Boy* by Richard Wright (1945) ▪ "Politics and the English Language" by George Orwell (1946) ▪ "Take the Tortillas Out of Your Poetry" by Rudolfo Anaya (1995)

Note: Given space limitations, the illustrative texts listed above are meant only to show individual titles that are representative of a range of topics and genres. (See Appendix B for excerpts of these and other texts illustrative of grades 6–12 text complexity, quality, and range.) At a curricular or instructional level, within and across grade levels, texts need to be selected around topics or themes that generate knowledge and allow students to study those topics or themes in depth.

Idaho Content Standards

Literacy in History/Social Studies, Science, and Technical Subjects

6-12 Section

College and Career Readiness Anchor Standards for Reading

The grades 6–12 standards on the following pages define what students should understand and be able to do by the end of each grade span. They correspond to the College and Career Readiness (CCR) anchor standards below by number. The CCR and grade-specific standards are necessary complements—the former providing broad standards, the latter providing additional specificity—that together define the skills and understandings that all students must demonstrate.

Key Ideas and details

CCRA.R.1 Read closely to determine what the text says explicitly and to make logical inferences from it; cite specific textual evidence when writing or speaking to support conclusions drawn from the text.

CCRA.R.2 Determine central ideas or themes of a text and analyze their development; summarize the key supporting details and ideas.

CCRA.R.3 Analyze how and why individuals, events, and ideas develop and interact over the course of a text.

Craft and Structure

CCRA.R.4 Interpret words and phrases as they are used in a text, including determining technical, connotative, and figurative meanings, and analyze how specific word choices shape meaning or tone.

CCRA.R.5 Analyze the structure of texts, including how specific sentences, paragraphs, and larger portions of the text (e.g., a section, chapter, scene, or stanza) relate to each other and the whole.

CCRA.R.6 Assess how point of view or purpose shapes the content and style of a text.

Integration of Knowledge and Ideas

CCRA.R.7 Integrate and evaluate content presented in diverse media and formats, including visually and quantitatively, as well as in words.*

CCRA.R.8 Delineate and evaluate the argument and specific claims in a text, including the validity of the reasoning as well as the relevance and sufficiency of the evidence.

CCRA.R.9 Analyze how two or more texts address similar themes or topics in order to build knowledge or to compare the approaches the authors take.

Range of Reading and Level of Text Complexity

CCRA.R.10 Read and comprehend complex literary and informational texts independently and proficiently.

**Please see "Research to Build and Present Knowledge" in Writing and "Comprehension and Collaboration" in Speaking and Listening for additional standards relevant to gathering, assessing, and applying information from print and digital sources.*

Note on range and content of student reading

Reading is critical to building knowledge in history/social studies as well as in science and technical subjects. College and career ready reading in these fields requires an appreciation of the norms and conventions of each discipline, such as the kinds of evidence used in history and science; an understanding of domain-specific words and phrases; an attention to precise details; and the capacity to evaluate intricate arguments, synthesize complex information, and follow detailed descriptions of events and concepts. In history/social studies, for example, students need to be able to analyze, evaluate, and differentiate primary and secondary sources. When reading scientific and technical texts, students need to be able to gain knowledge from challenging texts that often make extensive use of elaborate diagrams and data to convey information and illustrate concepts. Students must be able to read complex informational texts in these fields with independence and confidence because the vast majority of reading in college and workforce training programs will be sophisticated nonfiction. It is important to note that these Reading standards are meant to complement the specific content demands of the disciplines, not replace them.

Reading Standards for Literacy in History/Social Studies (6-12) RH

The standards below begin at grade 6; standards for K–5 reading in history/social studies, science, and technical subjects are integrated into the K–5 Reading standards. The CCR anchor standards and high school standards in literacy work in tandem to define college and career readiness expectations—the former providing broad standards, the latter providing additional specificity.

Grade 6-8 Students:	Grade 9-10 Students:	Grade 11-12 Students:
Key Ideas and Details		
RH.6-8.1 Cite specific textual evidence to support analysis of primary and secondary sources.	**RH.9-10.1** Cite specific textual evidence to support analysis of primary and secondary sources, attending to such features as the date and origin of the information.	**RH.11-12.1** Cite specific textual evidence to support analysis of primary and secondary sources, connecting insights gained from specific details to an understanding of the text as a whole.
RH. 6-8.2 Determine the central ideas or information of a primary or secondary source; provide an accurate summary of the source distinct from prior knowledge or opinions.	**RH.9-10.2** Determine the central ideas or information of a primary or secondary source; provide an accurate summary of how key events or ideas develop over the course of the text.	**RH.11-12.2** Determine the central ideas or information of a primary or secondary source; provide an accurate summary that makes clear the relationships among the key details and ideas.
RH. 6-8.3 Identify key steps in a text's description of a process related to history/social studies (e.g., how a bill becomes law, how interest rates are raised or lowered).	**RH.9-10.3** Analyze in detail a series of events described in a text; determine whether earlier events caused later ones or simply preceded them.	**RH.11-12.3** Evaluate various explanations for actions or events and determine which explanation best accords with textual evidence, acknowledging where the text leaves matters uncertain.
Craft and Structure		
RH. 6-8.4 Determine the meaning of words and phrases as they are used in a text, including vocabulary specific to domains related to history/social studies.	**RH.9-10.4** Determine the meaning of words and phrases as they are used in a text, including vocabulary describing political, social, or economic aspects of history/social studies.	**RH.11-12.4** Determine the meaning of words and phrases as they are used in a text, including analyzing how an author uses and refines the meaning of a key term over the course of a text (e.g., how Madison defines faction in Federalist No. 10).
RH. 6-8.5 Describe how a text presents information (e.g., sequentially, comparatively, causally).	**RH.9-10.5** Analyze how a text uses structure to emphasize key points or advance an explanation or analysis.	**RH.11-12.5** Analyze in detail how a complex primary source is structured, including how key sentences, paragraphs, and larger portions of the text contribute to the whole.
RH. 6-8.6 Identify aspects of a text that reveal an author's point of view or purpose (e.g., loaded language, inclusion or avoidance of particular facts).	**RH.9-10.6** Compare the point of view of two or more authors for how they treat the same or similar topics, including which details they include and emphasize in their respective accounts.	**RH.11-12.6** Evaluate authors' differing points of view on the same historical event or issue by assessing the authors' claims, reasoning, and evidence.
Integration of Knowledge and Ideas		
RH. 6-8.7 Integrate visual information (e.g., in charts, graphs, photographs, videos, or maps) with other information in print and digital texts.	**RH.9-10.7** Integrate quantitative or technical analysis (e.g., charts, research data) with qualitative analysis in print or digital text.	**RH.11-12.7** Integrate and evaluate multiple sources of information presented in diverse formats and media (e.g., visually, quantitatively, as well as in words) in order to address a question or solve a problem.
RH. 6-8.8 Distinguish among fact, opinion, and reasoned judgment in a text.	**RH.9-10.8** Assess the extent to which the reasoning and evidence in a text support the author's claims.	**RH.11-12.8** Evaluate an author's premises, claims, and evidence by corroborating or challenging them with other information.
RH. 6-8.9 Analyze the relationship between a primary and secondary source on the same topic.	**RH.9-10.9** Compare and contrast treatments of the same topic in several primary and secondary sources.	**RH.11-12.9** Integrate information from diverse sources, both primary and secondary, into a coherent understanding of an idea or event, noting discrepancies among sources.
Range of Reading and Level of Text Complexity		

RH.6-8.10 By the end of grade 8, read and comprehend history/social studies texts in the grades 6–8 text complexity band independently and proficiently.	**RH.9-10.10** By the end of grade 10, read and comprehend history/social studies texts in the grades 9–10 text complexity band independently and proficiently.	**RH.11-12.10** By the end of grade 12, read and comprehend history/social studies texts in the grades 11–CCR text complexity band independently and proficiently.

Reading Standards for Literacy in Science and Technical Subjects (6-12) RST

Grade 6-8 Students:	Grade 9-10 Students:	Grade 11-12 Students:
Key Ideas and Details		
RST.6-8.1 Cite specific textual evidence to support analysis of science and technical texts.	**RST.9-10.1** Cite specific textual evidence to support analysis of science and technical texts, attending to the precise details of explanations or descriptions.	**RST.11-12.1** Cite specific textual evidence to support analysis of science and technical texts, attending to important distinctions the author makes and to any gaps or inconsistencies in the account.
RST.6-8.2 Determine the central ideas or conclusions of a text; provide an accurate summary of the text distinct from prior knowledge or opinions.	**RST.9-10.2** Determine the central ideas or conclusions of a text; trace the text's explanation or depiction of a complex process, phenomenon, or concept; provide an accurate summary of the text.	**RST.11-12.2** Determine the central ideas or conclusions of a text; summarize complex concepts, processes, or information presented in a text by paraphrasing them in simpler but still accurate terms.
RST.6-8.3 Follow precisely a multistep procedure when carrying out experiments, taking measurements, or performing technical tasks.	**RST.9-10.3** Follow precisely a complex multistep procedure when carrying out experiments, taking measurements, or performing technical tasks, attending to special cases or exceptions defined in the text.	**RST.11-12.3** Follow precisely a complex multistep procedure when carrying out experiments, taking measurements, or performing technical tasks; analyze the specific results based on explanations in the text.
Craft and Structure		
RST.6-8.4 Determine the meaning of symbols, key terms, and other domain-specific words and phrases as they are used in a specific scientific or technical context relevant to grades 6–8 texts and topics.	**RST.9-10.4** Determine the meaning of symbols, key terms, and other domain-specific words and phrases as they are used in a specific scientific or technical context relevant to grades 9–10 texts and topics.	**RST.11-12.4** Determine the meaning of symbols, key terms, and other domain-specific words and phrases as they are used in a specific scientific or technical context relevant to grades 11–12 texts and topics.
RST.6-8.5 Analyze the structure an author uses to organize a text, including how the major sections contribute to the whole and to an understanding of the topic.	**RST.9-10.5** Analyze the structure of the relationships among concepts in a text, including relationships among key terms (e.g., force, friction, reaction force, energy).	**RST.11-12.5** Analyze how the text structures information or ideas into categories or hierarchies, demonstrating understanding of the information or ideas.
RST.6-8.6 Analyze the author's purpose in providing an explanation, describing a procedure, or discussing an experiment in a text.	**RST.9-10.6** Analyze the author's purpose in providing an explanation, describing a procedure, or discussing an experiment in a text, defining the question the author seeks to address.	**RST.11-12.6** Analyze the author's purpose in providing an explanation, describing a procedure, or discussing an experiment in a text, identifying important issues that remain unresolved.
Integration of Knowledge and Ideas		
RST.6-8.7 Integrate quantitative or technical information expressed in words in a text with a version of that information expressed visually (e.g., in a flowchart, diagram, model, graph, or table).	**RST.9-10.7** Translate quantitative or technical information expressed in words in a text into visual form (e.g., a table or chart) and translate information expressed visually or mathematically (e.g., in an equation) into words.	**RST.11-12.8.7** Integrate and evaluate multiple sources of information presented in diverse formats and media (e.g., quantitative data, video, multimedia) in order to address a question or solve a problem.
RST.6-8.8 Distinguish among facts, reasoned judgment based on research findings, and speculation in a text.	**RST.9-10.8** Assess the extent to which the reasoning and evidence in a text support the author's claim or a recommendation for solving a scientific or technical problem.	**RST.11-12.8** Evaluate the hypotheses, data, analysis, and conclusions in a science or technical text, verifying the data when possible and corroborating or challenging conclusions with other sources of information.
RST.6-8.9 Compare and contrast the information gained from experiments, simulations, video, or multimedia sources with that gained from reading a text on the same topic.	**RST.9-10.9** Compare and contrast findings presented in a text to those from other sources (including their own experiments), noting when the findings support or contradict previous explanations or accounts.	**RST.11-12.9** Synthesize information from a range of sources (e.g., texts, experiments, simulations) into a coherent understanding of a process, phenomenon, or concept, resolving conflicting information when possible.
Range of Reading and Level of Text Complexity		

RST.6-8.10 By the end of grade 8, read and comprehend science/technical texts in the grades 6–8 text complexity band independently and proficiently.	**RST.9-10.10** By the end of grade 10, read and comprehend science/technical texts in the grades 9–10 text complexity band independently and proficiently.	**RST.11-12.10** By the end of grade 12, read and comprehend science/technical texts in the grades 11–CCR text complexity band independently and proficiently.

College and Career Readiness Anchor Standards for Writing

The grades 6–12 standards on the following pages define what students should understand and be able to do by the end of each grade span. They correspond to the College and Career Readiness (CCR) anchor standards below by number. The CCR and grade-specific standards are necessary complements—the former providing broad standards, the latter providing additional specificity—that together define the skills and understandings that all students must demonstrate.

Text Types and Purposes*

CCRA.W.1 Write arguments to support claims in an analysis of substantive topics or texts, using valid reasoning and relevant and sufficient evidence.

CCRA.W.2 Write informative/explanatory texts to examine and convey complex ideas and information clearly and accurately through the effective selection, organization, and analysis of content.

CCRA.W.3 Write narratives to develop real or imagined experiences or events using effective technique, well-chosen details, and well-structured event sequences.

Production and Distribution of Writing

CCRA.W.4 Produce clear and coherent writing in which the development, organization, and style are appropriate to task, purpose, and audience.

CCRA.W.5 Write informative/explanatory texts to examine and convey complex ideas and information clearly and accurately through the effective selection, organization, and analysis of content.

CCRA.W.6 Use technology, including the Internet, to produce and publish writing and to interact and collaborate with others.

Research to Build and Present Knowledge

CCRA.W.7 Conduct short as well as more sustained research projects based on focused questions, demonstrating understanding of the subject under investigation.

CCRA.W.8 Gather relevant information from multiple print and digital sources, assess the credibility and accuracy of each source, and integrate the information while avoiding plagiarism.

CCRA.W.9 Draw evidence from literary or informational texts to support analysis, reflection, and research.

Range of Writing

CCRA.W.10 Write routinely over extended time frames (time for research, reflection, and revision) and shorter time frames (a single sitting or a day or two) for a range of tasks, purposes, and audiences

***These broad types of writing include many subgenres. See Appendix A for definitions of key writing types.*

Note on range and content of student writing

For students, writing is a key means of asserting and defending claims, showing what they know about a subject, and conveying what they have experienced, imagined, thought, and felt. To be college and career ready writers, students must take task, purpose, and audience into careful consideration, choosing words, information, structures, and formats deliberately. They need to be able to use technology strategically when creating, refining, and collaborating on writing. They have to become adept at gathering information, evaluating sources, and citing material accurately, reporting findings from their research and analysis of sources in a clear and cogent manner. They must have the flexibility, concentration, and fluency to produce high-quality first- draft text under a tight deadline and the capacity to revisit and make improvements to a piece of writing over multiple drafts when circumstances encourage or require it. To meet these goals, students must devote significant time and effort to writing, producing numerous pieces over short and long time frames throughout the year.

Writing Standards for Literacy in History/Social Studies, Science, and Technical Subjects 6-12 WHST

The standards below begin at grade 6; standards for K–5 writing in history/social studies, science, and technical subjects are integrated into the K–5 Writing standards. The CCR anchor standards and high school standards in literacy work in tandem to define college and career readiness expectations—the former providing broad standards, the latter providing additional specificity.

Grade 6-8 Students:	Grade 9-10 Students:	Grade 11-12 Students:
Text Types and Purposes		
WHST.6-8.1 Write arguments focused on discipline-specific content. a. Introduce claim(s) about a topic or issue, acknowledge and distinguish the claim(s) from alternate or opposing claims, and organize the reasons and evidence logically. b. Support claim(s) with logical reasoning and relevant, accurate data and evidence that demonstrate an understanding of the topic or text, using credible sources. c. Use words, phrases, and clauses to create cohesion and clarify the relationships among claim(s), counterclaims, reasons, and evidence. d. Use precise language and domain-specific vocabulary to inform about or explain the argument. ~~d.~~e. Establish and maintain a formal style. ~~e.~~f. Provide a concluding statement or section that follows from and supports the argument presented.	**WHST.9-10.1** Write arguments focused on discipline-specific content. a. Introduce precise claim(s), distinguish the claim(s) from alternate or opposing claims, and create an organization that establishes clear relationships among the claim(s), counterclaims, reasons, and evidence. b. Develop claim(s) and counterclaims fairly, supplying data and evidence for each while pointing out the strengths and limitations of both claim(s) and counterclaims in a discipline-appropriate form and in a manner that anticipates the audience's knowledge level and concerns. c. Use words, phrases, and clauses to link the major sections of the text, create cohesion, and clarify the relationships between claim(s) and reasons, between reasons and evidence, and between claim(s) and counterclaims. d. Use precise language and domain-specific vocabulary to manage the complexity of the argument and convey a style appropriate to the discipline and context as well as to the expertise of likely readers. ~~d.~~e. Establish and maintain a formal style and objective tone while attending to the norms and conventions of the discipline in which they are writing. ~~e.~~f. Provide a concluding statement or section that follows from or supports the argument presented.	**WHST.11-12.1** Write arguments focused on discipline-specific content. a. Introduce precise, knowledgeable claim(s), establish the significance of the claim(s), distinguish the claim(s) from alternate or opposing claims, and create an organization that logically sequences the claim(s), counterclaims, reasons, and evidence. b. Develop claim(s) and counterclaims fairly and thoroughly, supplying the most relevant data and evidence for each while pointing out the strengths and limitations of both claim(s) and counterclaims in a discipline-appropriate form that anticipates the audience's knowledge level, concerns, values, and possible biases. c. Use words, phrases, and clauses as well as varied syntax to link the major sections of the text, create cohesion, and clarify the relationships between claim(s) and reasons, between reasons and evidence, and between claim(s) and counterclaims. d. Use precise language, domain-specific vocabulary and techniques such as metaphor, simile, and analogy to manage the complexity of the argument; convey a knowledgeable stance in a style that responds to the discipline and context as well as to the expertise of likely readers. ~~d.~~e. Establish and maintain a formal style and objective tone while attending to the norms and conventions of the discipline in which they are writing. ~~e.~~f. Provide a concluding statement or section that follows from or supports the argument presented.
WHST.6-8.2 Write informative/explanatory texts, including the narration of historical events, scientific procedures/ experiments, or technical processes. a. Introduce a topic clearly, previewing what b. is to follow; organize ideas, concepts, and information into broader categories as appropriate to achieving purpose; include formatting (e.g., headings), graphics (e.g., charts, tables), and multimedia when useful to aiding comprehension. c. Develop the topic with relevant, well-chosen facts,	**WHST.9-10.2** Write informative/explanatory texts, including the narration of historical events, scientific procedures/ experiments, or technical processes. a. Introduce a topic and organize ideas, concepts, and information to make important connections and distinctions; include formatting (e.g., headings), graphics (e.g., figures, tables), and multimedia when useful to aiding comprehension. b. Develop the topic with well-chosen, relevant, and sufficient facts, extended definitions, concrete details,	**WHST.11-12.2** Write informative/explanatory texts, including the narration of historical events, scientific procedures/ experiments, or technical processes. a. Introduce a topic and organize complex ideas, concepts, and information so that each new element builds on that which precedes it to create a unified whole; include formatting (e.g., headings), graphics (e.g., figures, tables), and multimedia when useful to aiding comprehension. a. Develop the topic thoroughly by selecting the most

definitions, concrete details, quotations, or other information and examples. d. Use appropriate and varied transitions to create cohesion and clarify the relationships among ideas and concepts. e. Use precise language and domain-specific vocabulary to inform about or explain the topic. f. Establish and maintain a formal style and objective tone. g. Provide a concluding statement or section that follows from and supports the information or explanation presented.	quotations, or other information and examples appropriate to the audience's knowledge of the topic. c. Use varied transitions and sentence structures to link the major sections of the text, create cohesion, and clarify the relationships among ideas and concepts. d. Use precise language and domain-specific vocabulary to manage the complexity of the topic and convey a style appropriate to the discipline and context as well as to the expertise of likely readers. e. Establish and maintain a formal style and objective tone while attending to the norms and conventions of the discipline in which they are writing. f. Provide a concluding statement or section that follows from and supports the information or explanation presented (e.g., articulating implications or the significance of the topic).	significant and relevant facts, extended definitions, concrete details, quotations, or other information and examples appropriate to the audience's knowledge of the topic. b. Use varied transitions and sentence structures to link the major sections of the text, create cohesion, and clarify the relationships among complex ideas and concepts. c. Use precise language, domain-specific vocabulary and techniques such as metaphor, simile, and analogy to manage the complexity of the topic; convey a knowledgeable stance in a style that responds to the discipline and context as well as to the expertise of likely readers. d. Provide a concluding statement or section that follows from and supports the information or explanation provided (e.g., articulating implications or the significance of the topic).
WHST.6-8.3 (See note; not applicable as a separate requirement)	**WHST. 9-10.3** (See note; not applicable as a separate requirement)	**WHST.11-12.3** (See note; not applicable as a separate requirement)
Note: Students' narrative skills continue to grow in these grades. The Standards require that students be able to incorporate narrative elements effectively into arguments and informative/explanatory texts. In history/social studies, students must be able to incorporate narrative accounts into their analyses of individuals or events of historical import. In science and technical subjects, students must be able to write precise enough descriptions of the step-by-step procedures they use in their investigations or technical work that others can replicate them and (possibly) reach the same results.		
Production and Distribution of Writing		
WHST. 6-8.4 Produce clear and coherent writing in which the development, organization, and style are appropriate to task, purpose, and audience.	**WHST.9-10.4** Produce clear and coherent writing in which the development, organization, and style are appropriate to task, purpose, and audience.	**WHST.11-12.4** Produce clear and coherent writing in which the development, organization, and style are appropriate to task, purpose, and audience.
WHST.6.5 With some guidance and support from peers and adults, develop and strengthen writing as needed by planning, revising, editing, rewriting, or trying a new approach, focusing on how well purpose and audience have been addressed.	**WHST. 9-10.5** Develop and strengthen writing as needed by planning, revising, editing, rewriting, or trying a new approach, focusing on addressing what is most significant for a specific purpose and audience.	**WHST.11-12.5** Develop and strengthen writing as needed by planning, revising, editing, rewriting, or trying a new approach, focusing on addressing what is most significant for a specific purpose and audience.
WHST.6-8.6 Use technology, including the Internet, to produce and publish writing and present the relationships between information and ideas clearly and efficiently.	**WHST.9-107.6** Use technology, including the Internet, to produce, publish, and update individual or shared writing products, taking advantage of technology's capacity to link to other information and to display information flexibly and dynamically.	**WHST.11-12.6** Use technology, including the Internet, to produce, publish, and update individual or shared writing products in response to ongoing feedback, including new arguments or information.
Research to Build and Present Knowledge		
WHST.6-8.7 Conduct short research projects to answer a question (including a self-generated question), drawing on several sources and generating additional related, focused questions that allow for multiple avenues of exploration.	**WHST.9-10.7** Conduct short as well as more sustained research projects to answer a question (including a self-generated question) or solve a problem; narrow or broaden the inquiry when appropriate; synthesize multiple sources on the subject, demonstrating understanding of the subject under investigation.	**WHST.11-12.7** Conduct short as well as more sustained research projects to answer a question (including a self-generated question) or solve a problem; narrow or broaden the inquiry when appropriate; synthesize multiple sources on the subject, demonstrating understanding of the subject under investigation.
WHST.6-8.8 Gather relevant information from multiple print and digital sources, using search terms effectively; assess the	**WHST.9-10.8** Gather relevant information from multiple authoritative print and digital sources, using advanced searches	**WHST.8.8** Gather relevant information from multiple authoritative print and digital sources, using advanced searches

credibility and accuracy of each source; and quote or paraphrase the data and conclusions of others while avoiding plagiarism and following a standard format for citation.	effectively; assess the usefulness of each source in answering the research question; integrate information into the text selectively to maintain the flow of ideas, avoiding plagiarism and following a standard format for citation.	effectively; assess the strengths and limitations of each source in terms of the specific task, purpose, and audience; integrate information into the text selectively to maintain the flow of ideas, avoiding plagiarism and overreliance on any one source and following a standard format for citation.
WHST.6-8.9 Draw evidence from informational texts to support analysis, reflection, and research.	**WHST.9-10.9** Draw evidence from informational texts to support analysis, reflection, and research.	**WHST.11-12.9** Draw evidence from informational texts to support analysis, reflection, and research.
Range of Writing		
WHST.6-8.10 Write routinely over extended time frames (time for reflection and revision) and shorter time frames (a single sitting or a day or two) for a range of discipline-specific tasks, purposes, and audiences.	**WHST.9-10.10** Write routinely over extended time frames (time for reflection and revision) and shorter time frames (a single sitting or a day or two) for a range of discipline-specific tasks, purposes, and audiences.	**WHST.11-12.10** Write routinely over extended time frames (time for reflection and revision) and shorter time frames (a single sitting or a day or two) for a range of discipline-specific tasks, purposes, and audiences.

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Idaho Content Standards
MATHEMATICS

Approved by the Idaho State Board of Education, August 11, 2016

~~Common Core State Standards~~

Idaho Content Standards for Mathematics

Revised and Adapted from the Common Core State Standards for Mathematics

Table of Contents

Introduction

Toward greater focus and coherence

> *Mathematics experiences in early childhood settings should concentrate on (1) number (which includes whole number, operations, and relations) and (2) geometry, spatial relations, and measurement, with more mathematics learning time devoted to number than to other topics. Mathematical process goals should be integrated in these content areas.*
>
> — Mathematics Learning in Early Childhood, National Research Council, 2009

> *The composite standards [of Hong Kong, Korea and Singapore] have a number of features that can inform an international benchmarking process for the development of K–6 mathematics standards in the U.S. First, the composite standards concentrate the early learning of mathematics on the number, measurement, and geometry strands with less emphasis on data analysis and little exposure to algebra. The Hong Kong standards for grades 1–3 devote approximately half the targeted time to numbers and almost all the time remaining to geometry and measurement.*
>
> — Ginsburg, Leinwand and Decker, 2009

> *Because the mathematics concepts in [U.S.] textbooks are often weak, the presentation becomes more mechanical than is ideal. We looked at both traditional and non-traditional textbooks used in the US and found this conceptual weakness in both.*
>
> — Ginsburg et al., 2005

> *There are many ways to organize curricula. The challenge, now rarely met, is to avoid those that distort mathematics and turn off students.*
>
> — Steen, 2007

For over a decade, research studies of mathematics education in high-performing countries have pointed to the conclusion that the mathematics curriculum in the United States must become substantially more focused and coherent in order to improve mathematics achievement in this country. To deliver on the promise of common standards, the standards must address the problem of a curriculum that is “a mile wide and an inch deep.” These Standards are a substantial answer to that challenge.

It is important to recognize that “fewer standards” are no substitute for focused standards. Achieving “fewer standards” would be easy to do by resorting to broad, general statements. Instead, these Standards aim for clarity and specificity.

Assessing the coherence of a set of standards is more difficult than assessing their focus. William Schmidt and Richard Houang (2002) have said that content standards and curricula are coherent if they are:

> *articulated over time as a sequence of topics and performances that are logical and reflect, where appropriate, the sequential or hierarchical nature of the disciplinary content from which the subject matter derives. That is, what and how students are taught should reflect not only the topics that fall within a certain academic discipline, but also the key ideas that determine how knowledge is organized and generated within that discipline. This implies*

> *that to be coherent, a set of content standards must evolve from particulars (e.g., the meaning and operations of whole numbers, including simple math facts and routine computational procedures associated with whole numbers and fractions) to deeper structures inherent in the discipline. These deeper structures then serve as a means for connecting the particulars (such as an understanding of the rational number system and its properties).* (emphasis added)

These Standards endeavor to follow such a design, not only by stressing conceptual understanding of key ideas, but also by continually returning to organizing principles such as place value or the properties of operations to structure those ideas.

In addition, the "sequence of topics and performances" that is outlined in a body of mathematics standards must also respect what is known about how students learn.
As Confrey (2007) points out, developing "sequenced obstacles and challenges for students…absent the insights about meaning that derive from careful study of learning, would be unfortunate and unwise." In recognition of this, the development of these Standards began with research-based learning progressions detailing what is known today about how students' mathematical knowledge, skill, and understanding develop over time.

Understanding mathematics

These Standards define what students should understand and be able to do in their study of mathematics. Asking a student to understand something means asking a teacher to assess whether the student has understood it. But what does mathematical understanding look like? One hallmark of mathematical understanding is the ability to justify, in a way appropriate to the student's mathematical maturity, *why* a particular mathematical statement is true or where a mathematical rule comes from. There is a world of difference between a student who can summon a mnemonic device to expand a product such as $(a + b)(x + y)$ and a student who can explain where the mnemonic comes from. The student who can explain the rule understands the mathematics, and may have a better chance to succeed at a less familiar task such as expanding $(a + b + c)(x + y)$. Mathematical understanding and procedural skill are equally important, and both are assessable using mathematical tasks of sufficient richness.

The Standards set grade-specific standards but do not define the intervention methods or materials necessary to support students who are well below or well above grade-level expectations. It is also beyond the scope of the Standards to define the full range of supports appropriate for English language learners and for students with special needs. At the same time, all students must have the opportunity to learn and meet the same high standards if they are to access the knowledge and skills necessary in their post-school lives. The Standards should be read as allowing for the widest possible range of students to participate fully from the outset, along with appropriate accommodations to ensure maximum participation of students with special education needs. For example, for students with disabilities reading should allow for use of Braille, screen reader technology, or other assistive devices, while writing should include the use of a scribe, computer, or speech-to-text technology. In a similar vein, speaking and listening should be interpreted broadly to include sign language. No set of grade-specific standards can fully reflect the great variety in abilities, needs, learning rates, and achievement levels of students in any given classroom. However, the Standards do provide clear signposts along the way to the goal of college and career readiness for all students.

The Standards begin on page 6 with eight Standards for Mathematical Practice.

How to read the grade level standards

Standards define what students should understand and be able to do.

Clusters are groups of related standards. Note that standards from different clusters may sometimes be closely related, because mathematics
is a connected subject.

Domains are larger groups of related standards. Standards from different domains may sometimes be closely related.

domain

Number and operations in Base ten

3.nBt

Use place value understanding and properties of operations to perform multi-digit arithmetic.

Standard

1. Use place value understanding to round whole numbers to the nearest 10 or 100.
2. Fluently add and subtract within 1000 using strategies and algorithms based on place value, properties of operations, and/or the relationship between addition and subtraction.
3. Multiply one-digit whole numbers by multiples of 10 in the range 10-90 (e.g., 9 × 80, 5 × 60) using strategies based on place value and properties of operations.

Cluster

These Standards do not dictate curriculum or teaching methods. For example, just because topic A appears before topic B in the standards for a given grade, it does not necessarily mean that topic A must be taught before topic B. A teacher might prefer to teach topic B before topic A, or might choose to highlight connections by teaching topic A and topic B at the same time. Or, a teacher might prefer to teach a topic of his or her own choosing that leads, as a byproduct, to students reaching the standards for topics A and B.

What students can learn at any particular grade level depends upon what they have learned before. Ideally then, each standard in this document might have been phrased in the form, "Students who already know ... should next come to learn ...." But at present this approach is unrealistic—not least because existing education research cannot specify all such learning pathways. Of necessity therefore, grade placements for specific topics have been made on the basis of state and international comparisons and the collective experience and collective professional judgment of educators, researchers and mathematicians. One promise of common state standards is that over time they will allow research on learning progressions to inform and improve the design of standards to a much greater extent than is possible today. Learning opportunities will continue to vary across schools and school systems, and educators should make every effort to meet the needs of individual students based on their current understanding.

These Standards are not intended to be new names for old ways of doing business. They are a call to take the next step. It is time for states to work together to build on lessons learned from two decades of standards based reforms. It is time to recognize that standards are not just promises to our children, but promises we intend to keep.

Mathematics | Standards for Mathematical Practice

The Standards for Mathematical Practice describe varieties of expertise that mathematics educators at all levels should seek to develop in their students. These practices rest on important "processes and proficiencies" with longstanding importance in mathematics education. The first of these are the NCTM process standards of problem solving, reasoning and proof, communication, representation, and connections. The second are the strands of mathematical proficiency specified in the National Research Council's report *Adding It Up*: adaptive reasoning, strategic competence, conceptual understanding (comprehension of mathematical concepts, operations and relations), procedural fluency (skill in carrying out procedures flexibly, accurately, efficiently and appropriately), and productive disposition (habitual inclination to see mathematics as sensible, useful, and worthwhile, coupled with a belief in diligence and one's own efficacy).

1 Make sense of problems and persevere in solving them.

Mathematically proficient students start by explaining to themselves the meaning of a problem and looking for entry points to its solution. They analyze givens, constraints, relationships, and goals. They make conjectures about the form and meaning of the solution and plan a solution pathway rather than simply jumping into a solution attempt. They consider analogous problems, and try special cases and simpler forms of the original problem in order to gain insight into its solution. They monitor and evaluate their progress and change course if necessary. Older students might, depending on the context of the problem, transform algebraic expressions or change the viewing window on their graphing calculator to get the information they need. Mathematically proficient students can explain correspondences between equations, verbal descriptions, tables, and graphs or draw diagrams of important features and relationships, graph data, and search for regularity or trends. Younger students might rely on using concrete objects or pictures to help conceptualize
and solve a problem. Mathematically proficient students check their answers to problems using a different method, and they continually ask themselves, "Does this make sense?" They can understand the approaches of others to solving complex problems and identify correspondences between different approaches.

2 Reason abstractly and quantitatively.

Mathematically proficient students make sense of quantities and their relationships in problem situations. They bring two complementary abilities to bear on problems involving quantitative relationships: the ability to decontextualize—to abstract a given situation and represent it symbolically and manipulate the representing symbols as if they have a life of their own, without necessarily attending to their referents—and the ability to contextualize, to pause as needed during the manipulation process in order to probe into the referents for the symbols involved. Quantitative reasoning entails habits of creating a coherent representation of the problem at hand; considering the units involved; attending to the meaning of quantities, not just how to compute them; and knowing and flexibly using different properties of operations and objects.

3 Construct viable arguments and critique the reasoning of others.

Mathematically proficient students understand and use stated assumptions, definitions, and previously established results in constructing arguments. They make conjectures and build a logical progression of statements to explore the truth of their conjectures. They are able to analyze situations by breaking them into cases, and can recognize and use counterexamples. They justify their conclusions, communicate them to others, and respond to the arguments of others. They reason inductively about data, making plausible arguments that take into account the context from which the data arose. Mathematically proficient students are also able to compare the effectiveness of two plausible arguments, distinguish correct logic or reasoning from that which is flawed, and—if there is a flaw in an argument—explain what it is. Elementary students can construct arguments using concrete referents such as objects, drawings, diagrams, and actions. Such arguments can make sense and be correct, even though they are not generalized or made formal until later grades. Later, students learn to determine domains to which an argument applies. Students at all grades can listen or read the arguments of others, decide whether they make sense, and ask useful questions to clarify or improve the arguments.

4 Model with mathematics.

Mathematically proficient students can apply the mathematics they know to solve problems arising in everyday life, society, and the workplace. In early grades, this might be as simple as writing an addition equation to describe a situation. In middle grades, a student might apply proportional reasoning to plan a school event or analyze a problem in the community. By high school, a student might use geometry to solve a design problem or use a function to describe how one quantity of interest depends on another. Mathematically proficient students who can apply what they know are comfortable making assumptions and approximations to simplify a complicated situation, realizing that these may need revision later. They are able to identify important quantities in a practical situation and map their relationships using such tools as diagrams, two-way tables, graphs, flowcharts and formulas. They can analyze those relationships mathematically to draw conclusions. They routinely interpret their mathematical results in the context of the situation and reflect on whether the results make sense, possibly improving the model if it has not served its purpose.

5 Use appropriate tools strategically.

Mathematically proficient students consider the available tools when solving a mathematical problem. These tools might include pencil and paper, concrete models, a ruler, a protractor, a calculator, a spreadsheet, a computer algebra system, a statistical package, or dynamic geometry software. Proficient students are sufficiently familiar with tools appropriate for their grade or course to make sound decisions about when each of these tools might be helpful, recognizing both the insight to be gained and their limitations. For example, mathematically proficient high school students analyze graphs of functions and solutions generated using a graphing calculator. They detect possible errors by strategically using estimation and other mathematical knowledge. When making mathematical models, they know that technology can enable them to visualize the results of varying assumptions, explore consequences, and compare predictions with data. Mathematically proficient students at various grade levels are able to identify relevant external mathematical resources, such as digital content located on a website, and use them to pose or solve problems. They are able to use technological tools to explore and deepen their understanding of concepts.

6 Attend to precision.

Mathematically proficient students try to communicate precisely to others. They try to use clear definitions in discussion with others and in their own reasoning. They state the meaning of the symbols they choose, including using the equal sign consistently and appropriately. They are careful about specifying units of measure, and labeling axes to clarify the correspondence with quantities in a problem. They calculate accurately and efficiently, express numerical answers with a degree of precision appropriate for the problem context. In the elementary grades, students give carefully formulated explanations to each other. By the time they reach high school they have learned to examine claims and make explicit use of definitions.

7 Look for and make use of structure.

Mathematically proficient students look closely to discern a pattern or structure. Young students, for example, might notice that three and seven more is the same amount as seven and three more, or they may sort a collection of shapes according to how many sides the shapes have. Later, students will see 7 × 8 equals the well remembered 7 × 5 + 7 × 3, in preparation for learning about the distributive property. In the expression $x^2 + 9x + 14$, older students can see the 14 as 2 × 7 and the 9 as 2 + 7. They recognize the significance of an existing line in a geometric figure and can use the strategy of drawing an auxiliary line for solving problems. They also can step back for an overview and shift perspective. They can see complicated things, such as some algebraic expressions, as single objects or as being composed of several objects. For example, they can see $5 - 3(x - y)^2$ as 5 minus a positive number times a square and use that to realize that its value cannot be more than 5 for any real numbers x and y.

8 Look for and express regularity in repeated reasoning.

Mathematically proficient students notice if calculations are repeated, and look both for general methods and for shortcuts. Upper elementary students might notice when dividing 25 by 11 that they are repeating the same calculations over and over again, and conclude they have a repeating decimal. By paying attention to the calculation of slope as they repeatedly check whether points are on the line through (1, 2) with slope 3, middle school students might abstract the equation $(y - 2)/(x - 1) = 3$. Noticing the regularity in the way terms cancel when expanding $(x - 1)(x + 1)$, $(x - 1)(x_2 + x + 1)$, and $(x - 1)(x_3 + x_2 + x + 1)$ might lead them to the general formula for the sum of a geometric series. As they work to solve a problem, mathematically proficient students maintain oversight of the process, while attending to the details. They continually evaluate the reasonableness of their intermediate results.

Connecting the Standards for Mathematical Practice to the Standards for Mathematical Content

The Standards for Mathematical Practice describe ways in which developing student practitioners of the discipline of mathematics increasingly ought to engage with the subject matter as they grow in mathematical maturity and expertise throughout the elementary, middle and high school years. Designers of curricula, assessments, and professional development should all attend to the need to connect the mathematical practices to mathematical content in mathematics instruction.

The Standards for Mathematical Content are a balanced combination of procedure and understanding. Expectations that begin with the word "understand" are often especially good opportunities to connect the practices to the content. Students who lack understanding of a topic may rely on procedures too heavily. Without a flexible base from which to work, they may be less likely to consider analogous problems, represent problems coherently, justify conclusions, apply the mathematics to practical situations, use technology mindfully to work with the mathematics, explain the mathematics accurately to other students, step back for an overview, or deviate from a known procedure to find a shortcut. In short, a lack of understanding effectively prevents a student from engaging in the mathematical practices.

In this respect, those content standards which set an expectation of understanding are potential "points of intersection" between the Standards for Mathematical Content and the Standards for Mathematical Practice. These points of intersection are intended to be weighted toward central and generative concepts in the school mathematics curriculum that most merit the time, resources, innovative energies, and focus necessary to qualitatively improve the curriculum, instruction, assessment, professional development, and student achievement in mathematics.

Mathematics | Kindergarten

In Kindergarten, instructional time should focus on two critical areas: (1) representing, relating, and operating on whole numbers, initially with sets of objects; (2) describing shapes and space. More learning time in Kindergarten should be devoted to number than to other topics.

(1) Students use numbers, including written numerals, to represent quantities and to solve quantitative problems, such as counting objects in a set; counting out a given number of objects; comparing sets or numerals; and modeling simple joining and separating situations with sets of objects, or eventually with equations such as 5 + 2 = 7 and 7 – 2 = 5. (Kindergarten students should see addition and subtraction equations, and student writing of equations in kindergarten is encouraged, but it is not required.) Students choose, combine, and apply effective strategies for answering quantitative questions, including quickly recognizing the cardinalities of small sets of objects, counting and producing sets of given sizes, counting the number of objects in combined sets, or counting the number of objects that remain in a set after some are taken away.

(2) Students describe their physical world using geometric ideas (e.g., shape, orientation, spatial relations) and vocabulary. They identify, name, and describe basic two-dimensional shapes, such as squares, triangles, circles, rectangles, and hexagons, presented in a variety of ways (e.g., with different sizes and orientations), as well as three-dimensional shapes such as cubes, cones, cylinders, and spheres. They use basic shapes and spatial reasoning to model objects in their environment and to construct more complex shapes.

Grade K Overview

Counting and Cardinality

- Know number names and the count sequence.
- Count to tell the number of objects.
- Compare numbers.

Operations and Algebraic Thinking

- Understand addition as putting together and adding to, and understand subtraction as taking apart and taking from.

Number and Operations in Base Ten

- Work with numbers 11–19 to gain foundations for place value.

Measurement and Data

- Describe and compare measurable attributes.
- Classify objects and count the number of objects in categories.

Geometry

- Identify and describe shapes.
- Analyze, compare, create, and compose shapes.

Mathematical Practices

1. Make sense of problems and persevere in solving them.
2. Reason abstractly and quantitatively.
3. Construct viable arguments and critique the reasoning of others.
4. Model with mathematics.
5. Use appropriate tools strategically.
6. Attend to precision.
7. Look for and make use of structure.
8. Look for and express regularity in repeated reasoning.

Counting and Cardinality K.CC

Know number names and the count sequence.

1. Count to 100 by ones and by tens.
2. Count forward beginning from a given number within the known sequence (instead of having to begin at 1).
3. Write numbers from 0 to 20. Represent a number of objects with a written numeral 0-20 (with 0 representing a count of no objects).

Count to tell the number of objects.

4. Understand the relationship between numbers and quantities; connect counting to cardinality.
   a. When counting objects, say the number names in the standard order, pairing each object with one and only one number name and each number name with one and only one object.
   b. Understand that the last number name said tells the number of objects counted. The number of objects is the same regardless of their arrangement or the order in which they were counted.
   c. Understand that each successive number name refers to a quantity that is one larger.
5. Count to answer "how many?" questions about as many as 20 things arranged in a line, a rectangular array, or a circle, or as many as 10 things in a scattered configuration; given a number from 1–20, count out that many objects.

Compare numbers.

6. Identify whether the number of objects in one group is greater than, less than, or equal to the number of objects in another group, e.g., by using matching and counting strategies.[1]
7. Compare two numbers between 1 and 10 presented as written numerals.

Operations and Algebraic Thinking K.OA

Understand addition as putting together and adding to, and under- stand subtraction as taking apart and taking from.

1. Represent addition and subtraction with objects, fingers, mental images, drawings[2], sounds (e.g., claps), acting out situations, verbal explanations, expressions, or equations.
2. Solve addition and subtraction word problems, and add and subtract within 10, e.g., by using objects or drawings to represent the problem.
3. Decompose numbers less than or equal to 10 into pairs in more than one way, e.g., by using objects or drawings, and record each decomposition by a drawing or equation (e.g., 5 = 2 + 3 and 5 = 4 + 1).
4. For any number from 1 to 9, find the number that makes 10 when added to the given number, e.g., by using objects or drawings, and record the answer with a drawing or equation.
5. Fluently add and subtract within 5.

[1]Include groups with up to ten objects.
[2]Drawings need not show details, but should show the mathematics in the problem. (This applies wherever drawings are mentioned in the Standards.)

Number and Operations in Base Ten — K.NBT

Work with numbers 11–19 to gain foundations for place value.

1. Compose and decompose numbers from 11 to 19 into ten ones and some further ones, e.g., by using objects or drawings, and record each composition or decomposition by a drawing or equation (e.g., 18 = 10 + 8); understand that these numbers are composed of ten ones and one, two, three, four, five, six, seven, eight, or nine ones.

Measurement and Data — K.MD

Describe and compare measurable attributes.

1. Describe measurable attributes of objects, such as length or weight. Describe several measurable attributes of a single object.
2. Directly compare two objects with a measurable attribute in common, to see which object has “more of”/“less of” the attribute, and describe the difference. *For example, directly compare the heights of two children and describe one child as taller/shorter.*

Classify objects and count the number of objects in each category.

3. Classify objects into given categories; count the numbers of objects in each category and sort the categories by count.[3]

Geometry — K.G

Identify and describe shapes (squares, circles, triangles, rectangles, hexagons, cubes, cones, cylinders, and spheres).

1. Describe objects in the environment using names of shapes, and describe the relative positions of these objects using terms such as *above*, *below*, *beside*, *in front of*, *behind*, and *next to*.
2. Correctly name shapes regardless of their orientations or overall size.
3. Identify shapes as two-dimensional (lying in a plane, “flat”) or three- dimensional (“solid”).

Analyze, compare, create, and compose shapes.

4. Analyze and compare two- and three-dimensional shapes, in different sizes and orientations, using informal language to describe their similarities, differences, parts (e.g., number of sides and vertices/“corners”) and other attributes (e.g., having sides of equal length).
5. Model shapes in the world by building shapes from components (e.g., sticks and clay balls) and drawing shapes.
6. Compose simple shapes to form larger shapes. *For example, “Can you join these two triangles with full sides touching to make a rectangle?”*

[3]Limit category counts to be less than or equal to 10.

Mathematics | Grade 1

In Grade 1, instructional time should focus on four critical areas: (1) developing understanding of addition, subtraction, and strategies for addition and subtraction within 20; (2) developing understanding of whole number relationships and place value, including grouping in tens and ones; (3) developing understanding of linear measurement and measuring lengths as iterating length units; and (4) reasoning about attributes of, and composing and decomposing geometric shapes.

(1) Students develop strategies for adding and subtracting whole numbers based on their prior work with small numbers. They use a variety of models, including discrete objects and length-based models (e.g., cubes connected to form lengths), to model add-to, take-from, put-together, take-apart, and compare situations to develop meaning for the operations of addition and subtraction, and to develop strategies to solve arithmetic problems with these operations. Students understand connections between counting and addition and subtraction (e.g., adding two is the same as counting on two). They use properties of addition to add whole numbers and to create and use increasingly sophisticated strategies based on these properties (e.g., "making tens") to solve addition and subtraction problems within 20. By comparing a variety of solution strategies, children build their understanding of the relationship between addition and subtraction.

(2) Students develop, discuss, and use efficient, accurate, and generalizable methods to add within 100 and subtract multiples of 10. They compare whole numbers (at least to 100) to develop understanding of and solve problems involving their relative sizes. They think of whole numbers between 10 and 100 in terms of tens and ones (especially recognizing the numbers 11 to 19 as composed of a ten and some ones). Through activities that build number sense, they understand the order of the counting numbers and their relative magnitudes.

(3) Students develop an understanding of the meaning and processes of measurement, including underlying concepts such as iterating (the mental activity of building up the length of an object with equal-sized units) and the transitivity principle for indirect measurement.[1]

(4) Students compose and decompose plane or solid figures (e.g., put two triangles together to make a quadrilateral) and build understanding of part-whole relationships as well as the properties of the original and composite shapes. As they combine shapes, they recognize them from different perspectives and orientation, describe their geometric attributes, and determine how they are alike and different , to develop the background for measurement and for initial understandings of properties such as congruence and symmetry.

[1]Students should apply the principle of transitivity of measurement to make indirect comparisons, but they need not use this technical term.

Grade 1 Overview

Operations and Algebraic Thinking

- Represent and solve problems involving addition and subtraction.
- Understand and apply properties of operations and the relationship between addition and subtraction.
- Add and subtract within 20.
- Work with addition and subtraction equations.

Number and Operations in Base Ten

- Extend the counting sequence.
- Understand place value.
- Use place value understanding and properties of operations to add and subtract.

Measurement and Data

- Measure lengths indirectly and by iterating length units.
- Tell and write time.
- Represent and interpret data.

Geometry

- Reason with shapes and their attributes.

Mathematical Practices

1. Make sense of problems and persevere in solving them.
2. Reason abstractly and quantitatively.
3. Construct viable arguments and critique the reasoning of others.
4. Model with mathematics.
5. Use appropriate tools strategically.
6. Attend to precision.
7. Look for and make use of structure.
8. Look for and express regularity in repeated reasoning.

Operations and Algebraic Thinking 1.OA

Represent and solve problems involving addition and subtraction.

1. Use addition and subtraction within 20 to solve word problems involving situations of adding to, taking from, putting together, taking apart, and comparing, with unknowns in all positions, e.g., by using objects, drawings, and equations with a symbol for the unknown number to represent the problem.[2]

2. Solve word problems that call for addition of three whole numbers whose sum is less than or equal to 20, e.g., by using objects, drawings, and equations with a symbol for the unknown number to represent the problem.

Understand and apply properties of operations and the relationship between addition and subtraction.

3. Apply properties of operations as strategies to add and subtract.[3] *Examples: If 8 + 3 = 11 is known, then 3 + 8 = 11 is also known. (Commutative property of addition.) To add 2 + 6 + 4, the second two numbers can be added to make a ten, so 2 + 6 + 4 = 2 + 10 = 12. (Associative property of addition.)*

4. Understand subtraction as an unknown-addend problem. *For example, subtract 10 – 8 by finding the number that makes 10 when added to 8.*

Add and subtract within 20.

5. Relate counting to addition and subtraction (e.g., by counting on 2 to add 2).

6. Add and subtract within 20, demonstrating fluency for addition and subtraction within 10. Use strategies such as counting on; making ten (e.g., 8 + 6 = 8 + 2 + 4 = 10 + 4 = 14); decomposing a number leading to a ten (e.g., 13 – 4 = 13 – 3 – 1 = 10 – 1 = 9); using the relationship between addition and subtraction (e.g., knowing that 8 + 4 = 12, one knows 12 – 8 = 4); and creating equivalent but easier or known sums (e.g., adding 6 + 7 by creating the known equivalent 6 + 6 + 1 = 12 + 1 = 13).

Work with addition and subtraction equations.

7. Understand the meaning of the equal sign, and determine if equations involving addition and subtraction are true or false. *For example, which of the following equations are true and which are false? 6 = 6, 7 = 8 – 1, 5 + 2 = 2 + 5, 4 + 1 = 5 + 2.*

8. Determine the unknown whole number in an addition or subtraction equation relating three whole numbers. *For example, determine the unknown number that makes the equation true in each of the equations 8 + ? = 11, 5 = � – 3, 6 + 6 = �.*

Number and Operations in Base Ten 1.NBT

Extend the counting sequence.

1. Count to 120, starting at any number less than 120. In this range, read and write numerals and represent a number of objects with a written numeral.

Understand place value.

2. Understand that the two digits of a two-digit number represent amounts of tens and ones. Understand the following as special cases:
   a. 10 can be thought of as a bundle of ten ones — called a "ten."
   b. The numbers from 11 to 19 are composed of a ten and one, two, three, four, five, six, seven, eight, or nine ones.
   c. The numbers 10, 20, 30, 40, 50, 60, 70, 80, 90 refer to one, two, three, four, five, six, seven, eight, or nine tens (and 0 ones).

[2]See Glossary, Table 1.
[3]Students need not use formal terms for these properties.

3. Compare two two-digit numbers based on meanings of the tens and ones digits, recording the results of comparisons with the symbols >, =, and <.

Use place value understanding and properties of operations to add and subtract.

4. Add within 100, including adding a two-digit number and a one-digit number, and adding a two-digit number and a multiple of 10, using concrete models or drawings and strategies based on place value, properties of operations, and/or the relationship between addition and subtraction; relate the strategy to a written method and explain the reasoning used. Understand that in adding two-digit numbers, one adds tens and tens, ones and ones; and sometimes it is necessary to compose a ten.
5. Given a two-digit number, mentally find 10 more or 10 less than the number, without having to count; explain the reasoning used.
6. Subtract multiples of 10 in the range 10-90 from multiples of 10 in the range 10-90 (positive or zero differences), using concrete models or drawings and strategies based on place value, properties of operations, and/or the relationship between addition and subtraction; relate the strategy to a written method and explain the reasoning used.

Measurement and Data 1.MD

Measure lengths indirectly and by iterating length units.

1. Order three objects by length; compare the lengths of two objects indirectly by using a third object.
2. Express the length of an object as a whole number of length units, by laying multiple copies of a shorter object (the length unit) end to end; understand that the length measurement of an object is the number of same-size length units that span it with no gaps or overlaps. *Limit to contexts where the object being measured is spanned by a whole number of length units with no gaps or overlaps.*

Tell and write time.

3. Tell and write time in hours and half-hours using analog and digital clocks.

Represent and interpret data.

4. Organize, represent, and interpret data with up to three categories; ask and answer questions about the total number of data points, how many in each category, and how many more or less are in one category than in another.

Geometry 1.G

Reason with shapes and their attributes.

1. Distinguish between defining attributes (e.g., triangles are closed and three-sided) versus non-defining attributes (e.g., color, orientation, overall size); build and draw shapes to possess defining attributes.
2. Compose two-dimensional shapes (rectangles, squares, trapezoids, triangles, half-circles, and quarter-circles) or three-dimensional shapes (cubes, right rectangular prisms, right circular cones, and right circular cylinders) to create a composite shape, and compose new shapes from the composite shape.[4]
3. Partition circles and rectangles into two and four equal shares, describe the shares using the words *halves*, *fourths*, and *quarters*, and use the phrases *half of*, *fourth of*, and *quarter of*. Describe the whole as two of, or four of the shares. Understand for these examples that decomposing into more equal shares creates smaller shares.

[4]Students do not need to learn formal names such as “right rectangular prism.”

Mathematics | Grade 2

In Grade 2, instructional time should focus on four critical areas: (1) extending understanding of base-ten notation; (2) building fluency with addition and subtraction; (3) using standard units of measure; and (4) describing and analyzing shapes.

(1) Students extend their understanding of the base-ten system. This includes ideas of counting in fives, tens, and multiples of hundreds, tens, and ones, as well as number relationships involving these units, including comparing. Students understand multi-digit numbers (up to 1000) written in base-ten notation, recognizing that the digits in each place represent amounts of thousands, hundreds, tens, or ones (e.g., 853 is 8 hundreds + 5 tens + 3 ones).

Students use their understanding of addition to develop fluency with addition and subtraction within 100. They solve problems within 1000 by applying their understanding of models for addition and subtraction, and they develop, discuss, and use efficient, accurate, and generalizable methods to compute sums and differences of whole numbers in base-ten notation, using their understanding of place value and the properties of operations. They select and accurately apply methods that are appropriate for the context and the numbers involved to mentally calculate sums and differences for numbers with only tens or only hundreds.

(2) Students recognize the need for standard units of measure (centimeter and inch) and they use rulers and other measurement tools with the understanding that linear measure involves an iteration of units. They recognize that the smaller the unit, the more iterations they need to cover a given length.

(3) Students describe and analyze shapes by examining their sides and angles. Students investigate, describe, and reason about decomposing and combining shapes to make other shapes. Through building, drawing, and analyzing two- and three-dimensional shapes, students develop a foundation for understanding area, volume, congruence, similarity, and symmetry in later grades.

Grade 2 Overview

Operations and Algebraic Thinking

- Represent and solve problems involving addition and subtraction.
- Add and subtract within 20.
- Work with equal groups of objects to gain foundations for multiplication.

Number and Operations in Base Ten

- Understand place value.
- Use place value understanding and properties of operations to add and subtract.

Measurement and Data

- Measure and estimate lengths in standard units.
- Relate addition and subtraction to length.
- Work with time and money.
- Represent and interpret data.

Geometry

- Reason with shapes and their attributes.

Mathematical Practices

1. Make sense of problems and persevere in solving them.
2. Reason abstractly and quantitatively.
3. Construct viable arguments and critique the reasoning of others.
4. Model with mathematics.
5. Use appropriate tools strategically.
6. Attend to precision.
7. Look for and make use of structure.
8. Look for and express regularity in repeated reasoning.

Operations and Algebraic Thinking 2.OA

Represent and solve problems involving addition and subtraction.

1. Use addition and subtraction within 100 to solve one- and two-step word problems involving situations of adding to, taking from, putting together, taking apart, and comparing, with unknowns in all positions, e.g., by using drawings and equations with a symbol for the unknown number to represent the problem.[1]

Add and subtract within 20.

2. Fluently add and subtract within 20 using mental strategies.[2] By end of Grade 2, know from memory all sums of two one-digit numbers.

Work with equal groups of objects to gain foundations for multiplication.

3. Determine whether a group of objects (up to 20) has an odd or even number of members, e.g., by pairing objects or counting them by 2s; write an equation to express an even number as a sum of two equal addends.
4. Use addition to find the total number of objects arranged in rectangular arrays with up to 5 rows and up to 5 columns; write an equation to express the total as a sum of equal addends.

Number and Operations in Base Ten 2.NBT

Understand place value.

1. Understand that the three digits of a three-digit number represent amounts of hundreds, tens, and ones; e.g., 706 equals 7 hundreds, 0 tens, and 6 ones. Understand the following as special cases:
   a. 100 can be thought of as a bundle of ten tens — called a “hundred.”
   b. The numbers 100, 200, 300, 400, 500, 600, 700, 800, 900 refer to one, two, three, four, five, six, seven, eight, or nine hundreds (and 0 tens and 0 ones).
2. Count within 1000; skip-count by 5s, 10s, and 100s.
3. Read and write numbers to 1000 using base-ten numerals, number names, and expanded form.
4. Compare two three-digit numbers based on meanings of the hundreds, tens, and ones digits, using >, =, and < symbols to record the results of comparisons.

Use place value understanding and properties of operations to add and subtract.

5. Fluently add and subtract within 100 using strategies based on place value, properties of operations, and/or the relationship between addition and subtraction.
6. Add up to four two-digit numbers using strategies based on place value and properties of operations.
7. Add and subtract within 1000, using concrete models or drawings and strategies based on place value, properties of operations, and/or the relationship between addition and subtraction; relate the strategy to a written method. Understand that in adding or subtracting three- digit numbers, one adds or subtracts hundreds and hundreds, tens and tens, ones and ones; and sometimes it is necessary to compose or decompose tens or hundreds.
8. Mentally add 10 or 100 to a given number 100–900, and mentally subtract 10 or 100 from a given number 100–900.
9. Explain why addition and subtraction strategies work, using place value and the properties of operations.[3]

[1]See Glossary, Table 1.
[2]See standard 1.OA.6 for a list of mental strategies.
[3]Explanations may be supported by drawings or objects.

Measurement and Data 2.MD

Measure and estimate lengths in standard units.

1. Measure the length of an object by selecting and using appropriate tools such as rulers, yardsticks, meter sticks, and measuring tapes.
2. Measure the length of an object twice, using length units of different lengths for the two measurements; describe how the two measurements relate to the size of the unit chosen.
3. Estimate lengths using units of inches, feet, centimeters, and meters.
4. Measure to determine how much longer one object is than another, expressing the length difference in terms of a standard length unit.

Relate addition and subtraction to length.

5. Use addition and subtraction within 100 to solve word problems involving lengths that are given in the same units, e.g., by using drawings (such as drawings of rulers) and equations with a symbol for the unknown number to represent the problem.
6. Represent whole numbers as lengths from 0 on a number line diagram with equally spaced points corresponding to the numbers 0, 1, 2, ..., and represent whole-number sums and differences within 100 on a number line diagram.

Work with time and money.

7. Tell and write time from analog and digital clocks to the nearest five minutes, using a.m. and p.m.
8. Solve word problems involving dollar bills, quarters, dimes, nickels, and pennies, using $ and ¢ symbols appropriately. *Example: If you have 2 dimes and 3 pennies, how many cents do you have?*

Represent and interpret data.

9. Generate measurement data by measuring lengths of several objects to the nearest whole unit, or by making repeated measurements of the same object. Show the measurements by making a line plot, where the horizontal scale is marked off in whole-number units.
10. Draw a picture graph and a bar graph (with single-unit scale) to represent a data set with up to four categories. Solve simple put- together, take-apart, and compare problems[4] using information presented in a bar graph.

Geometry 2.G

Reason with shapes and their attributes.

1. Recognize and draw shapes having specified attributes, such as a given number of angles or a given number of equal faces.[5] Identify triangles, quadrilaterals, pentagons, hexagons, and cubes.
2. Partition a rectangle into rows and columns of same-size squares and count to find the total number of them.
3. Partition circles and rectangles into two, three, or four equal shares, describe the shares using the words *halves*, *thirds*, *half of*, *a third of*, etc., and describe the whole as two halves, three thirds, four fourths. Recognize that equal shares of identical wholes need not have the same shape.

[4]See Glossary, Table 1.
[5]Sizes are compared directly or visually, not compared by measuring.

Mathematics | Grade 3

In Grade 3, instructional time should focus on four critical areas: (1) developing understanding of multiplication and division and strategies for multiplication and division within 100; (2) developing understanding of fractions, especially unit fractions (fractions with numerator 1); (3) developing understanding of the structure of rectangular arrays and of area; and (4) describing and analyzing two-dimensional shapes.

(1) Students develop an understanding of the meanings of multiplication and division of whole numbers through activities and problems involving equal-sized groups, arrays, and area models; multiplication is finding an unknown product, and division is finding an unknown factor in these situations. For equal-sized group situations, division can require finding the unknown number of groups or the unknown group size. Students use properties of operations to calculate products of whole numbers, using increasingly sophisticated strategies based on these properties to solve multiplication and division problems involving single-digit factors. By comparing a variety of solution strategies, students learn the relationship between multiplication and division.

(2) Students develop an understanding of fractions, beginning with unit fractions. Students view fractions in general as being built out of unit fractions, and they use fractions along with visual fraction models to represent parts of a whole. Students understand that the size of a fractional part is relative to the size of the whole. For example, 1/2 of the paint in a small bucket could be less paint than 1/3 of the paint in a larger bucket, but 1/3 of a ribbon is longer than 1/5 of the same ribbon because when the ribbon is divided into 3 equal parts, the parts are longer than when the ribbon is divided into 5 equal parts. Students are able to use fractions to represent numbers equal to, less than, and greater than one. They solve problems that involve comparing fractions by using visual fraction models and strategies based on noticing equal numerators or denominators.

(3) Students recognize area as an attribute of two-dimensional regions. They measure the area of a shape by finding the total number of same- size units of area required to cover the shape without gaps or overlaps, a square with sides of unit length being the standard unit for measuring area. Students understand that rectangular arrays can be decomposed into identical rows or into identical columns. By decomposing rectangles into rectangular arrays of squares, students connect area to multiplication, and justify using multiplication to determine the area of a rectangle.

(4) Students describe, analyze, and compare properties of two- dimensional shapes. They compare and classify shapes by their sides and angles, and connect these with definitions of shapes. Students also relate their fraction work to geometry by expressing the area of part of a shape as a unit fraction of the whole.

Grade 3 Overview

Operations and Algebraic Thinking

- Represent and solve problems involving multiplication and division.
- Understand properties of multiplication and the relationship between multiplication and division.
- Multiply and Divide Within 100.
- Solve problems involving the four operations, and identify and explain patterns in arithmetic.

Number and Operations in Base Ten

- Use place value understanding and properties of operations to perform multi-digit arithmetic.

Number and Operations—Fractions

- Develop understanding of fractions as numbers.

Measurement and Data

- Solve problems involving measurement and estimation of intervals of time, liquid volumes, and masses of objects.
- Represent and Interpret Data.
- Geometric measurement: understand concepts of area and relate area to multiplication and to addition.
- Geometric measurement: recognize perimeter as an attribute of plane figures and distinguish between linear and area measures.

Geometry

- Reason with shapes and their attributes.

Mathematical Practices

1. Make sense of problems and persevere in solving them.
2. Reason abstractly and quantitatively.
3. Construct viable arguments and critique the reasoning of others.
4. Model with mathematics.
5. Use appropriate tools strategically.
6. Attend to precision.
7. Look for and make use of structure.
8. Look for and express regularity in repeated reasoning.

Operations and Algebraic Thinking 3.OA

Represent and solve problems involving multiplication and division.

1. Interpret products of whole numbers, e.g., interpret 5 × 7 as the total number of objects in 5 groups of 7 objects each. *For example, describe a context in which a total number of objects can be expressed as 5 × 7.*
2. Interpret whole-number quotients of whole numbers, e.g., interpret 56 ÷ 8 as the number of objects in each share when 56 objects are partitioned equally into 8 shares, or as a number of shares when 56 objects are partitioned into equal shares of 8 objects each. *For example, describe a context in which a number of shares or a number of groups can be expressed as 56 ÷ 8.*
3. Use multiplication and division within 100 to solve word problems in situations involving equal groups, arrays, and measurement quantities, e.g., by using drawings and equations with a symbol for the unknown number to represent the problem.[1]
4. Determine the unknown whole number in a multiplication or division equation relating three whole numbers. *For example, determine the unknown number that makes the equation true in each of the equations 8 × ? = 48, 5 = � ÷ 3, 6 × 6 = ?.*

Understand properties of multiplication and the relationship between multiplication and division.

5. Apply properties of operations as strategies to multiply and divide.[2] *Examples: If 6 × 4 = 24 is known, then 4 × 6 = 24 is also known. (Commutative property of multiplication.) 3 × 5 × 2 can be found by 3 × 5 = 15, then 15 × 2 = 30, or by 5 × 2 = 10, then 3 × 10 = 30. (Associative property of multiplication.) Knowing that 8 × 5 = 40 and 8 × 2 = 16, one can find 8 × 7 as 8 × (5 + 2) = (8 × 5) + (8 × 2) = 40 + 16 = 56. (Distributive property.)*
6. Understand division as an unknown-factor problem. *For example, find 32 ÷ 8 by finding the number that makes 32 when multiplied by 8.*

Multiply and divide within 100.

7. Fluently multiply and divide within 100, using strategies such as the relationship between multiplication and division (e.g., knowing that 8 × 5 = 40, one knows 40 ÷ 5 = 8) or properties of operations. By the end of Grade 3, know from memory all products of two one-digit numbers.

Solve problems involving the four operations, and identify and explain patterns in arithmetic.

8. Solve two-step word problems using the four operations. Represent these problems using equations with a letter standing for the unknown quantity. Assess the reasonableness of answers using mental computation and estimation strategies including rounding.[3]
9. Identify arithmetic patterns (including patterns in the addition table or multiplication table), and explain them using properties of operations. *For example, observe that 4 times a number is always even, and explain why 4 times a number can be decomposed into two equal addends.*

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[1]See Glossary, Table 2.
[2]Students need not use formal terms for these properties.
[3]This standard is limited to problems posed with whole numbers and having whole- number answers; students should know how to perform operations in the conven- tional order when there are no parentheses to specify a particular order (Order of Operations).

Number and Operations in Base Ten 3.NBT

Use place value understanding and properties of operations to perform multi-digit arithmetic.[4]

1. Use place value understanding to round whole numbers to the nearest 10 or 100.
2. Fluently add and subtract within 1000 using strategies and algorithms based on place value, properties of operations, and/or the relationship between addition and subtraction.
3. Multiply one-digit whole numbers by multiples of 10 in the range 10–90 (e.g., 9 × 80, 5 × 60) using strategies based on place value and properties of operations.

Number and Operations—Fractions[5] 3.NF

Develop understanding of fractions as numbers.

1. Understand a fraction 1/*b* as the quantity formed by 1 part when a whole is partitioned into *b* equal parts; understand a fraction *a*/*b* as the quantity formed by *a* parts of size 1/*b*.
2. Understand a fraction as a number on the number line; represent fractions on a number line diagram.
   a. Represent a fraction 1/*b* on a number line diagram by defining the interval from 0 to 1 as the whole and partitioning it into *b* equal parts. Recognize that each part has size 1/*b* and that the endpoint of the part based at 0 locates the number 1/*b* on the number line.
   b. Represent a fraction *a*/*b* on a number line diagram by marking off *a* lengths 1/*b* from 0. Recognize that the resulting interval has size *a*/*b* and that its endpoint locates the number *a*/*b* on the number line.
3. Explain equivalence of fractions in special cases, and compare fractions by reasoning about their size.
   a. Understand two fractions as equivalent (equal) if they are the same size, or the same point on a number line.
   b. Recognize and generate simple equivalent fractions, e.g., 1/2 = 2/4, 4/6 = 2/3. Explain why the fractions are equivalent, e.g., by using a visual fraction model.
   c. Express whole numbers as fractions, and recognize fractions that are equivalent to whole numbers. *Examples: Express 3 in the form 3 = 3/1; recognize that 6/1 = 6; locate 4/4 and 1 at the same point of a number line diagram.*
   d. Compare two fractions with the same numerator or the same denominator by reasoning about their size. Recognize that comparisons are valid only when the two fractions refer to the same whole. Record the results of comparisons with the symbols >, =, or <, and justify the conclusions, e.g., by using a visual fraction model.

Measurement and Data 3.MD

Solve problems involving measurement and estimation of intervals of time, liquid volumes, and masses of objects.

1. Tell and write time to the nearest minute and measure time intervals in minutes. Solve word problems involving addition and subtraction of time intervals in minutes, e.g., by representing the problem on a number line diagram.

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[4] A range of algorithms may be used.
[5] Grade 3 expectations in this domain are limited to fractions with denominators 2, 3, 4, 6, and 8.

2. Measure and estimate liquid volumes and masses of objects using standard units of grams (g), kilograms (kg), and liters (l).[6] Add, subtract, multiply, or divide to solve one-step word problems involving masses or volumes that are given in the same units, e.g., by using drawings (such as a beaker with a measurement scale) to represent the problem.[7]

Represent and interpret data.

3. Draw a scaled picture graph and a scaled bar graph to represent a data set with several categories. Solve one- and two-step "how many more" and "how many less" problems using information presented in scaled bar graphs. *For example, draw a bar graph in which each square in the bar graph might represent 5 pets.*
4. Generate measurement data by measuring lengths using rulers marked with halves and fourths of an inch. Show the data by making a line plot, where the horizontal scale is marked off in appropriate units— whole numbers, halves, or quarters.

Geometric measurement: understand concepts of area and relate area to multiplication and to addition.

5. Recognize area as an attribute of plane figures and understand concepts of area measurement.
   a. A square with side length 1 unit, called "a unit square," is said to have "one square unit" of area, and can be used to measure area.
   b. A plane figure which can be covered without gaps or overlaps by *n* unit squares is said to have an area of *n* square units.
6. Measure areas by counting unit squares (square cm, square m, square in, square ft, and improvised units).
7. Relate area to the operations of multiplication and addition.
   a. Find the area of a rectangle with whole-number side lengths by tiling it, and show that the area is the same as would be found by multiplying the side lengths.
   b. Multiply side lengths to find areas of rectangles with whole- number side lengths in the context of solving real world and mathematical problems, and represent whole-number products as rectangular areas in mathematical reasoning.
   c. Use tiling to show in a concrete case that the area of a rectangle with whole-number side lengths a and $b + c$ is the sum of $a \times b$ and $a \times c$. Use area models to represent the distributive property in mathematical reasoning.
   d. Recognize area as additive. Find areas of rectilinear figures by decomposing them into non-overlapping rectangles and adding the areas of the non-overlapping parts, applying this technique to solve real world problems.

Geometric measurement: recognize perimeter as an attribute of plane figures and distinguish between linear and area measures.

8. Solve real world and mathematical problems involving perimeters of polygons, including finding the perimeter given the side lengths, finding an unknown side length, and exhibiting rectangles with thesame perimeter and different areas or with the same area and different perimeters.

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[6] Excludes compound units such as cm^3 and finding the geometric volume of a container.

[7] Excludes multiplicative comparison problems (problems involving notions of "times as much"; see Glossary, Table 2).

Geometry	3.G

Reason with shapes and their attributes.

1. Understand that shapes in different categories (e.g., rhombuses, rectangles, and others) may share attributes (e.g., having four sides), and that the shared attributes can define a larger category (e.g., quadrilaterals). Recognize rhombuses, rectangles, and squares as examples of quadrilaterals, and draw examples of quadrilaterals that do not belong to any of these subcategories.

2. Partition shapes into parts with equal areas. Express the area of each part as a unit fraction of the whole. *For example, partition a shape into 4 parts with equal area, and describe the area of each part as 1/4 of the area of the shape.*

Mathematics | Grade 4

In Grade 4, instructional time should focus on three critical areas: (1) developing understanding and fluency with multi-digit multiplication, and developing understanding of dividing to find quotients involving multi-digit dividends; (2) developing an understanding of fraction equivalence, addition and subtraction of fractions with like denominators, and multiplication of fractions by whole numbers; (3) understanding that geometric figures can be analyzed and classified based on their properties, such as having parallel sides, perpendicular sides, particular angle measures, and symmetry.

(1) Students generalize their understanding of place value to 1,000,000, understanding the relative sizes of numbers in each place. They apply their understanding of models for multiplication (equal-sized groups, arrays, area models), place value, and properties of operations, in particular the distributive property, as they develop, discuss, and use efficient, accurate, and generalizable methods to compute products of multi-digit whole numbers. Depending on the numbers and the context, they select and accurately apply appropriate methods to estimate or mentally calculate products. They develop fluency with efficient procedures for multiplying whole numbers; understand and explain why the procedures work based on place value and properties of operations; and use them to solve problems. Students apply their understanding of models for division, place value, properties of operations, and the relationship of division to multiplication as they develop, discuss, and use efficient, accurate, and generalizable procedures to find quotients involving multi-digit dividends. They select and accurately apply appropriate methods to estimate and mentally calculate quotients, and interpret remainders based upon the context.

(2) Students develop understanding of fraction equivalence and operations with fractions. They recognize that two different fractions can be equal (e.g., 15/9 = 5/3), and they develop methods for generating and recognizing equivalent fractions. Students extend previous understandings about how fractions are built from unit fractions, composing fractions from unit fractions, decomposing fractions into unit fractions, and using the meaning of fractions and the meaning of multiplication to multiply a fraction by a whole number.

(3) Students describe, analyze, compare, and classify two-dimensional shapes. Through building, drawing, and analyzing two-dimensional shapes, students deepen their understanding of properties of two-dimensional objects and the use of them to solve problems involving symmetry.

Grade 4 Overview

Operations and Algebraic Thinking

- Use the four operations with whole numbers to solve problems.
- Gain familiarity with factors and multiples.
- Generate and analyze patterns.

Number and Operations in Base Ten

- Generalize place value understanding for multi- digit whole numbers.
- Use place value understanding and properties of operations to perform multi-digit arithmetic.

Number and Operations—Fractions

- Extend understanding of fraction equivalence and ordering.
- Build fractions from unit fractions by applying and extending previous understandings of operations on whole numbers.
- Understand decimal notation for fractions, and compare decimal fractions.

Measurement and Data

- Solve problems involving measurement and conversion of measurements from a larger unit to a smaller unit.
- Represent and interpret data.
- Geometric measurement: understand concepts of angle and measure angles.

Geometry

- Draw and identify lines and angles, and classify shapes by properties of their lines and angles.

Mathematical Practices

1. Make sense of problems and persevere in solving them.
2. Reason abstractly and quantitatively.
3. Construct viable arguments and critique the reasoning of others.
4. Model with mathematics.
5. Use appropriate tools strategically.
6. Attend to precision.
7. Look for and make use of structure.
8. Look for and express regularity in repeated reasoning.

Operations and Algebraic Thinking 4.OA

Use the four operations with whole numbers to solve problems.

1. Interpret a multiplication equation as a comparison, e.g., interpret 35 = 5 × 7 as a statement that 35 is 5 times as many as 7 and 7 times as many as 5. Represent verbal statements of multiplicative comparisons as multiplication equations.
2. Multiply or divide to solve word problems involving multiplicative comparison, e.g., by using drawings and equations with a symbol for the unknown number to represent the problem, distinguishing multiplicative comparison from additive comparison.[1]
3. Solve multistep word problems posed with whole numbers and having whole-number answers using the four operations, including problems in which remainders must be interpreted. Represent these problems using equations with a letter standing for the unknown quantity. Assess the reasonableness of answers using mental computation and estimation strategies including rounding.

Gain familiarity with factors and multiples.

4. Find all factor pairs for a whole number in the range 1–100. Recognize that a whole number is a multiple of each of its factors. Determine whether a given whole number in the range 1–100 is a multiple of a given one-digit number. Determine whether a given whole number in the range 1–100 is prime or composite.

Generate and analyze patterns.

5. Generate a number or shape pattern that follows a given rule. Identify apparent features of the pattern that were not explicit in the rule itself. *For example, given the rule "Add 3" and the starting number 1, generate terms in the resulting sequence and observe that the terms appear to alternate between odd and even numbers. Explain informally why the numbers will continue to alternate in this way.*

Number and Operations in Base Ten[2] 4.NBT

Generalize place value understanding for multi-digit whole numbers.

1. Recognize that in a multi-digit whole number, a digit in one place represents ten times what it represents in the place to its right. *For example, recognize that 700 ÷ 70 = 10 by applying concepts of place value and division.*
2. Read and write multi-digit whole numbers using base-ten numerals, number names, and expanded form. Compare two multi-digit numbers based on meanings of the digits in each place, using >, =, and < symbols to record the results of comparisons.
3. Use place value understanding to round multi-digit whole numbers to any place.

Use place value understanding and properties of operations to perform multi-digit arithmetic.

4. Fluently add and subtract multi-digit whole numbers using the standard algorithm.
5. Multiply a whole number of up to four digits by a one-digit whole number, and multiply two two-digit numbers, using strategies based on place value and the properties of operations. Illustrate and explain the calculation by using equations, rectangular arrays, and/or area models.

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[1]See Glossary, Table 2.
[2]Grade 4 expectations in this domain are limited to whole numbers less than or equal to 1,000,000.

6. Find whole-number quotients and remainders with up to four-digit dividends and one-digit divisors, using strategies based on place value, the properties of operations, and/or the relationship between multiplication and division. Illustrate and explain the calculation by using equations, rectangular arrays, and/or area models.

Number and Operations—Fractions[3] 4.NF

Extend understanding of fraction equivalence and ordering.

1. Explain why a fraction *a*/*b* is equivalent to a fraction (*n* × *a*)/(*n* × *b*) by using visual fraction models, with attention to how the number and size of the parts differ even though the two fractions themselves are the same size. Use this principle to recognize and generate equivalent fractions.
2. Compare two fractions with different numerators and different denominators, e.g., by creating common denominators or numerators, or by comparing to a benchmark fraction such as 1/2. Recognize that comparisons are valid only when the two fractions refer to the same whole. Record the results of comparisons with symbols >, =, or <, and justify the conclusions, e.g., by using a visual fraction model.

Build fractions from unit fractions by applying and extending previous understandings of operations on whole numbers.

3. Understand a fraction *a*/*b* with *a* > 1 as a sum of fractions 1/*b*.
    a. Understand addition and subtraction of fractions as joining and separating parts referring to the same whole.
    b. Decompose a fraction into a sum of fractions with the same denominator in more than one way, recording each decomposition by an equation. Justify decompositions, e.g., by using a visual fraction model. *Examples: 3/8 = 1/8 + 1/8 + 1/8 ; 3/8 = 1/8 + 2/8 ; 2 1/8 = 1 + 1 + 1/8 = 8/8 + 8/8 + 1/8.*
    c. Add and subtract mixed numbers with like denominators, e.g., by replacing each mixed number with an equivalent fraction, and/or by using properties of operations and the relationship between addition and subtraction.
    d. Solve word problems involving addition and subtraction of fractions referring to the same whole and having like denominators, e.g., by using visual fraction models and equations to represent the problem.
4. Apply and extend previous understandings of multiplication to multiply a fraction by a whole number.
    a. Understand a fraction *a*/*b* as a multiple of 1/*b*. *For example, use a visual fraction model to represent 5/4 as the product 5 × (1/4), recording the conclusion by the equation 5/4 = 5 × (1/4).*
    b. Understand a multiple of *a*/*b* as a multiple of 1/*b*, and use this understanding to multiply a fraction by a whole number. *For example, use a visual fraction model to express 3 × (2/5) as 6 × (1/5), recognizing this product as 6/5. (In general, n × (a/b) = (n × a)/b.)*
    c. Solve word problems involving multiplication of a fraction by a whole number, e.g., by using visual fraction models and equations to represent the problem. *For example, if each person at a party will eat 3/8 of a pound of roast beef, and there will be 5 people at the party, how many pounds of roast beef will be needed? Between what two whole numbers does your answer lie?*

[3]Grade 4 expectations in this domain are limited to fractions with denominators 2, 3, 4, 5, 6, 8, 10, 12, and 100.

Understand decimal notation for fractions, and compare decimal fractions.

5. Express a fraction with denominator 10 as an equivalent fraction with denominator 100, and use this technique to add two fractions with respective denominators 10 and 100.[4] *For example, express 3/10 as 30/100, and add 3/10 + 4/100 = 34/100.*
6. Use decimal notation for fractions with denominators 10 or 100. *For example, rewrite 0.62 as 62/100; describe a length as 0.62 meters; locate 0.62 on a number line diagram.*
7. Compare two decimals to hundredths by reasoning about their size. Recognize that comparisons are valid only when the two decimals refer to the same whole. Record the results of comparisons with the symbols >, =, or <, and justify the conclusions, e.g., by using a visual model.

Measurement and Data 4.MD

Solve problems involving measurement and conversion of measurements from a larger unit to a smaller unit.

1. Know relative sizes of measurement units within one system of units including km, m, cm; kg, g; lb, oz.; l, ml; hr, min, sec. Within a single system of measurement, express measurements in a larger unit in terms of a smaller unit. Record measurement equivalents in a two- column table. *For example, know that 1 ft is 12 times as long as 1 in. Express the length of a 4 ft snake as 48 in. Generate a conversion table for feet and inches listing the number pairs (1, 12), (2, 24), (3, 36), ...*
2. Use the four operations to solve word problems involving distances, intervals of time, liquid volumes, masses of objects, and money, including problems involving simple fractions or decimals, and problems that require expressing measurements given in a larger unit in terms of a smaller unit. Represent measurement quantities using diagrams such as number line diagrams that feature a measurement scale.
3. Apply the area and perimeter formulas for rectangles in real world and mathematical problems. *For example, find the width of a rectangular room given the area of the flooring and the length, by viewing the area formula as a multiplication equation with an unknown factor.*

Represent and interpret data.

4. Make a line plot to display a data set of measurements in fractions of a unit (1/2, 1/4, 1/8). Solve problems involving addition and subtraction of fractions by using information presented in line plots. *For example, from a line plot find and interpret the difference in length between the longest and shortest specimens in an insect collection.*

Geometric measurement: understand concepts of angle and measure angles.

5. Recognize angles as geometric shapes that are formed wherever two rays share a common endpoint, and understand concepts of angle measurement:
    a. An angle is measured with reference to a circle with its center at the common endpoint of the rays, by considering the fraction of the circular arc between the points where the two rays intersect the circle. An angle that turns through 1/360 of a circle is called a “one-degree angle,” and can be used to measure angles.
    b. An angle that turns through *n* one-degree angles is said to have an angle measure of *n* degrees.

[4]Students who can generate equivalent fractions can develop strategies for adding fractions with unlike denominators in general. But addition and subtraction with un- like denominators in general is not a requirement at this grade.

6. Measure angles in whole-number degrees using a protractor. Sketch angles of specified measure.
7. Recognize angle measure as additive. When an angle is decomposed into non-overlapping parts, the angle measure of the whole is the sum of the angle measures of the parts. Solve addition and subtraction problems to find unknown angles on a diagram in real world and mathematical problems, e.g., by using an equation with a symbol for the unknown angle measure.

Geometry 4.G

Draw and identify lines and angles, and classify shapes by properties of their lines and angles.

1. Draw points, lines, line segments, rays, angles (right, acute, obtuse), and perpendicular and parallel lines. Identify these in two-dimensional figures.
2. Classify two-dimensional figures based on the presence or absence of parallel or perpendicular lines, or the presence or absence of angles of a specified size. Recognize right triangles as a category, and identify right triangles.
3. Recognize a line of symmetry for a two-dimensional figure as a line across the figure such that the figure can be folded along the line into matching parts. Identify line-symmetric figures and draw lines of symmetry.

Mathematics | Grade 5

In Grade 5, instructional time should focus on three critical areas: (1) developing fluency with addition and subtraction of fractions, and developing understanding of the multiplication of fractions and of division of fractions in limited cases (unit fractions divided by whole numbers and whole numbers divided by unit fractions); (2) extending division to 2-digit divisors, integrating decimal fractions into the place value system and developing understanding of operations with decimals to hundredths, and developing fluency with whole number and decimal operations; and (3) developing understanding of volume.

(1) Students apply their understanding of fractions and fraction models to represent the addition and subtraction of fractions with unlike denominators as equivalent calculations with like denominators. They develop fluency in calculating sums and differences of fractions, and make reasonable estimates of them. Students also use the meaning of fractions, of multiplication and division, and the relationship between multiplication and division to understand and explain why the procedures for multiplying and dividing fractions make sense. (Note: this is limited to the case of dividing unit fractions by whole numbers and whole numbers by unit fractions.)

(2) Students develop understanding of why division procedures work based on the meaning of base-ten numerals and properties of operations. They finalize fluency with multi-digit addition, subtraction, multiplication, and division. They apply their understandings of models for decimals, decimal notation, and properties of operations to add and subtract decimals to hundredths. They develop fluency in these computations, and make reasonable estimates of their results. Students use the relationship between decimals and fractions, as well as the relationship between finite decimals and whole numbers (i.e., a finite decimal multiplied by an appropriate power of 10 is a whole number), to understand and explain why the procedures for multiplying and dividing finite decimals make sense. They compute products and quotients of decimals to hundredths efficiently and accurately.

(3) Students recognize volume as an attribute of three-dimensional space. They understand that volume can be measured by finding the total number of same-size units of volume required to fill the space without gaps or overlaps. They understand that a 1-unit by 1-unit by 1-unit cube is the standard unit for measuring volume. They select appropriate units, strategies, and tools for solving problems that involve estimating and measuring volume. They decompose three-dimensional shapes and find volumes of right rectangular prisms by viewing them as decomposed into layers of arrays of cubes. They measure necessary attributes of shapes in order to determine volumes to solve real world and mathematical problems.

Grade 5 Overview

Operations and Algebraic Thinking

- Write and interpret numerical expressions.
- Analyze patterns and relationships.

Number and Operations in Base Ten

- Understand the place value system.
- Perform operations with multi-digit whole numbers and with decimals to hundredths.

Number and Operations—Fractions

- Use equivalent fractions as a strategy to add and subtract fractions.
- Apply and extend previous understandings of multiplication and division to multiply and divide fractions.

Measurement and Data

- Convert like measurement units within a given measurement system.
- Represent and interpret data.
- Geometric measurement: understand concepts of volume and relate volume to multiplication and to addition.

Geometry

- Graph points on the coordinate plane to solve real-world and mathematical problems.
- Classify two-dimensional figures into categories based on their properties.

Mathematical Practices

1. Make sense of problems and persevere in solving them.
2. Reason abstractly and quantitatively.
3. Construct viable arguments and critique the reasoning of others.
4. Model with mathematics.
5. Use appropriate tools strategically.
6. Attend to precision.
7. Look for and make use of structure.
8. Look for and express regularity in repeated reasoning.

Operations and Algebraic Thinking 5.OA

Write and interpret numerical expressions.

1. Use parentheses, brackets, or braces in numerical expressions, and evaluate expressions with these symbols.
2. Write simple expressions that record calculations with numbers, and interpret numerical expressions without evaluating them. *For example, express the calculation "add 8 and 7, then multiply by 2" as 2 × (8 + 7). Recognize that 3 × (18932 + 921) is three times as large as 18932 + 921, without having to calculate the indicated sum or product.*

Analyze patterns and relationships.

3. Generate two numerical patterns using two given rules. Identify apparent relationships between corresponding terms. Form ordered pairs consisting of corresponding terms from the two patterns, and graph the ordered pairs on a coordinate plane. *For example, given the rule "Add 3" and the starting number 0, and given the rule "Add 6" and the starting number 0, generate terms in the resulting sequences, and observe that the terms in one sequence are twice the corresponding terms in the other sequence. Explain informally why this is so.*

Number and Operations in Base Ten 5.NBT

Understand the place value system.

1. Recognize that in a multi-digit number, a digit in one place represents 10 times as much as it represents in the place to its right and 1/10 of what it represents in the place to its left.
2. Explain patterns in the number of zeros of the product when multiplying a number by powers of 10, and explain patterns in the placement of the decimal point when a decimal is multiplied or divided by a power of 10. Use whole-number exponents to denote powers of 10.
3. Read, write, and compare decimals to thousandths.
   a. Read and write decimals to thousandths using base-ten numerals, number names, and expanded form, e.g., 347.392 = 3 × 100 + 4 × 10 + 7 × 1 + 3 × (1/10) + 9 × (1/100) + 2 × (1/1000).
   b. Compare two decimals to thousandths based on meanings of the digits in each place, using >, =, and < symbols to record the results of comparisons.
4. Use place value understanding to round decimals to any place.

Perform operations with multi-digit whole numbers and with decimals to hundredths.

5. Fluently multiply multi-digit whole numbers using the standard algorithm.
6. Find whole-number quotients of whole numbers with up to four-digit dividends and two-digit divisors, using strategies based on place value, the properties of operations, and/or the relationship between multiplication and division. Illustrate and explain the calculation by using equations, rectangular arrays, and/or area models.
7. Add, subtract, multiply, and divide decimals to hundredths, using concrete models or drawings and strategies based on place value, properties of operations, and/or the relationship between addition and subtraction; relate the strategy to a written method and explain the reasoning used.

Use equivalent fractions as a strategy to add and subtract fractions.

1. Add and subtract fractions with unlike denominators (including mixed numbers) by replacing given fractions with equivalent fractions in such a way as to produce an equivalent sum or difference of fractions with like denominators. *For example, 2/3 + 5/4 = 8/12 + 15/12 = 23/12. (In general, a/b + c/d = (ad + bc)/bd.)*
2. Solve word problems involving addition and subtraction of fractions referring to the same whole, including cases of unlike denominators, e.g., by using visual fraction models or equations to represent the problem. Use benchmark fractions and number sense of fractions to estimate mentally and assess the reasonableness of answers. *For example, recognize an incorrect result 2/5 + 1/2 = 3/7, by observing that 3/7 < 1/2.*

Apply and extend previous understandings of multiplication and division to multiply and divide fractions.

3. Interpret a fraction as division of the numerator by the denominator ($a/b = a \div b$). Solve word problems involving division of whole numbers leading to answers in the form of fractions or mixed numbers, e.g., by using visual fraction models or equations to represent the problem. *For example, interpret 3/4 as the result of dividing 3 by 4, noting that 3/4 multiplied by 4 equals 3, and that when 3 wholes are shared equally among 4 people each person has a share of size 3/4. If 9 people want to share a 50-pound sack of rice equally by weight, how many pounds of rice should each person get? Between what two whole numbers does your answer lie?*
4. Apply and extend previous understandings of multiplication to multiply a fraction or whole number by a fraction.
   a. Interpret the product $(a/b) \times q$ as a parts of a partition of q into b equal parts; equivalently, as the result of a sequence of operations $a \times q \div b$. *For example, use a visual fraction model to show (2/3) × 4 = 8/3, and create a story context for this equation. Do the same with (2/3) × (4/5) = 8/15. (In general, (a/b) × (c/d) = ac/bd.)*
   b. Find the area of a rectangle with fractional side lengths by tiling it with unit squares of the appropriate unit fraction side lengths, and show that the area is the same as would be found by multiplying the side lengths. Multiply fractional side lengths to find areas of rectangles, and represent fraction products as rectangular areas.
5. Interpret multiplication as scaling (resizing), by:
   a. Comparing the size of a product to the size of one factor on the basis of the size of the other factor, without performing the indicated multiplication.
   b. Explaining why multiplying a given number by a fraction greater than 1 results in a product greater than the given number (recognizing multiplication by whole numbers greater than 1 as a familiar case); explaining why multiplying a given number by a fraction less than 1 results in a product smaller than the given number; and relating the principle of fraction equivalence $a/b = (n \times a)/(n \times b)$ to the effect of multiplying a/b by 1.
6. Solve real world problems involving multiplication of fractions and mixed numbers, e.g., by using visual fraction models or equations to represent the problem.
7. Apply and extend previous understandings of division to divide unit fractions by whole numbers and whole numbers by unit fractions.[1]
   a. Interpret division of a unit fraction by a non-zero whole number,

[1]Students able to multiply fractions in general can develop strategies to divide frac- tions in general, by reasoning about the relationship between multiplication and division. But division of a fraction by a fraction is not a requirement at this grade.

and compute such quotients. *For example, create a story context for (1/3) ÷ 4, and use a visual fraction model to show the quotient. Use the relationship between multiplication and division to explain that (1/3) ÷ 4 = 1/12 because (1/12) × 4 = 1/3.*

b. Interpret division of a whole number by a unit fraction, and compute such quotients. *For example, create a story context for 4 ÷ (1/5), and use a visual fraction model to show the quotient. Use the relationship between multiplication and division to explain that 4 ÷ (1/5) = 20 because 20 × (1/5) = 4.*

c. Solve real world problems involving division of unit fractions by non-zero whole numbers and division of whole numbers by unit fractions, e.g., by using visual fraction models and equations to represent the problem. *For example, how much chocolate will each person get if 3 people share 1/2 lb of chocolate equally? How many 1/3-cup servings are in 2 cups of raisins?*

Measurement and Data 5.MD

Convert like measurement units within a given measurement system.

1. Convert among different-sized standard measurement units within a given measurement system (e.g., convert 5 cm to 0.05 m), and use these conversions in solving multi-step, real world problems.

Represent and interpret data.

2. Make a line plot to display a data set of measurements in fractions of a unit (1/2, 1/4, 1/8). Use operations on fractions for this grade to solve problems involving information presented in line plots. *For example, given different measurements of liquid in identical beakers, find the amount of liquid each beaker would contain if the total amount in all the beakers were redistributed equally.*

Geometric measurement: understand concepts of volume and relate volume to multiplication and to addition.

3. Recognize volume as an attribute of solid figures and understand concepts of volume measurement.
   a. A cube with side length 1 unit, called a "unit cube," is said to have "one cubic unit" of volume, and can be used to measure volume.
   b. A solid figure which can be packed without gaps or overlaps using *n* unit cubes is said to have a volume of *n* cubic units.
4. Measure volumes by counting unit cubes, using cubic cm, cubic in, cubic ft, and improvised units.
5. Relate volume to the operations of multiplication and addition and solve real world and mathematical problems involving volume.
   a. Find the volume of a right rectangular prism with whole-number side lengths by packing it with unit cubes, and show that the volume is the same as would be found by multiplying the edge lengths, equivalently by multiplying the height by the area of the base. Represent threefold whole-number products as volumes, e.g., to represent the associative property of multiplication.
   b. Apply the formulas $V = l \times w \times h$ and $V = b \times h$ for rectangular prisms to find volumes of right rectangular prisms with whole- number edge lengths in the context of solving real world and mathematical problems.
   c. Recognize volume as additive. Find volumes of solid figures composed of two non-overlapping right rectangular prisms by adding the volumes of the non-overlapping parts, applying this technique to solve real world problems.

Geometry 5.G

Graph points on the coordinate plane to solve real-world and mathematical problems.

1. Use a pair of perpendicular number lines, called axes, to define a coordinate system, with the intersection of the lines (the origin) arranged to coincide with the 0 on each line and a given point in the plane located by using an ordered pair of numbers, called its coordinates. Understand that the first number indicates how far to travel from the origin in the direction of one axis, and the second number indicates how far to travel in the direction of the second axis, with the convention that the names of the two axes and the coordinates correspond (e.g., *x*-axis and *x*-coordinate, *y*-axis and *y*-coordinate).
2. Represent real world and mathematical problems by graphing points in the first quadrant of the coordinate plane, and interpret coordinate values of points in the context of the situation.

Classify two-dimensional figures into categories based on their properties.

3. Understand that attributes belonging to a category of two- dimensional figures also belong to all subcategories of that category. *For example, all rectangles have four right angles and squares are rectangles, so all squares have four right angles.*
4. Classify two-dimensional figures in a hierarchy based on properties.

Mathematics | Grade 6

In Grade 6, instructional time should focus on four critical areas: (1) connecting ratio and rate to whole number multiplication and division and using concepts of ratio and rate to solve problems; (2) completing understanding of division of fractions and extending the notion of number to the system of rational numbers, which includes negative numbers; (3) writing, interpreting, and using expressions and equations; and (4) developing understanding of statistical thinking.

(1) Students use reasoning about multiplication and division to solve ratio and rate problems about quantities. By viewing equivalent ratios and rates as deriving from, and extending, pairs of rows (or columns) in the multiplication table, and by analyzing simple drawings that indicate the relative size of quantities, students connect their understanding of multiplication and division with ratios and rates. Thus students expand the scope of problems for which they can use multiplication and division to solve problems, and they connect ratios and fractions. Students solve a wide variety of problems involving ratios and rates.

(2) Students use the meaning of fractions, the meanings of multiplication and division, and the relationship between multiplication and division to understand and explain why the procedures for dividing fractions make sense. Students use these operations to solve problems. Students extend their previous understandings of number and the ordering of numbers to the full system of rational numbers, which includes negative rational numbers, and in particular negative integers. They reason about the order and absolute value of rational numbers and about the location of points in all four quadrants of the coordinate plane.

(3) Students understand the use of variables in mathematical expressions. They write expressions and equations that correspond to given situations, evaluate expressions, and use expressions and formulas to solve problems. Students understand that expressions in different forms can be equivalent, and they use the properties of operations to rewrite expressions in equivalent forms. Students know that the solutions of an equation are the values of the variables that make the equation true. Students use properties of operations and the idea of maintaining the equality of both sides of an equation to solve simple one-step equations. Students construct and analyze tables, such as tables of quantities that are in equivalent ratios, and they use equations (such as $3x = y$) to describe relationships between quantities.

(4) Building on and reinforcing their understanding of number, students begin to develop their ability to think statistically. Students recognize that a data distribution may not have a definite center and that different ways to measure center yield different values. The median measures center in the sense that it is roughly the middle value. The mean measures center in the sense that it is the value that each data point would take on if the total of the data values were redistributed equally, and also in the sense that it is a balance point. Students recognize that a measure of variability (interquartile range or mean absolute deviation) can also be useful for summarizing data because two very different sets of data can have the same mean and median yet be distinguished by their variability. Students learn to describe and summarize numerical data sets, identifying clusters, peaks, gaps, and symmetry, considering the context in which the data were collected.

Students in Grade 6 also build on their work with area in elementary school by reasoning about relationships among shapes to determine area, surface area, and volume. They find areas of right triangles, other triangles, and special quadrilaterals by decomposing these shapes, rearranging or removing pieces, and relating the shapes to rectangles. Using these methods, students discuss, develop, and justify formulas for areas of triangles and parallelograms. Students find areas of polygons and surface areas of prisms and pyramids by decomposing them into pieces whose area they can determine. They reason about right rectangular prisms with fractional side lengths to extend formulas for the volume of a right rectangular prism to fractional side lengths. They prepare for work on scale drawings and constructions in Grade 7 by drawing polygons in the coordinate plane.

Grade 6 Overview

Ratios and Proportional Relationships

- Understand ratio concepts and use ratio reasoning to solve problems.

The Number System

- Apply and extend previous understandings of multiplication and division to divide fractions by fractions.
- Compute fluently with multi-digit numbers and find common factors and multiples.
- Apply and extend previous understandings of numbers to the system of rational numbers.

Expressions and Equations

- Apply and extend previous understandings of arithmetic to algebraic expressions.
- Reason about and solve one-variable equations and inequalities.
- Represent and analyze quantitative relationships between dependent and independent variables.

Geometry

- Solve real-world and mathematical problems involving area, surface area, and volume.

Statistics and Probability

- Develop understanding of statistical variability.
- Summarize and describe distributions.

Mathematical Practices

1. Make sense of problems and persevere in solving them.
2. Reason abstractly and quantitatively.
3. Construct viable arguments and critique the reasoning of others.
4. Model with mathematics.
5. Use appropriate tools strategically.
6. Attend to precision.
7. Look for and make use of structure.
8. Look for and express regularity in repeated reasoning.

Ratios and Proportional Relationships 6.RP

Understand ratio concepts and use ratio reasoning to solve problems.

1. Understand the concept of a ratio and use ratio language to describe a ratio relationship between two quantities. *For example, "The ratio of wings to beaks in the bird house at the zoo was 2:1, because for every 2 wings there was 1 beak." "For every vote candidate A received, candidate C received nearly three votes."*
2. Understand the concept of a unit rate *a*/*b* associated with a ratio *a*:*b* with $b \neq 0$, and use rate language in the context of a ratio relationship. *For example, "This recipe has a ratio of 3 cups of flour to 4 cups of sugar, so there is 3/4 cup of flour for each cup of sugar." "We paid $75 for 15 hamburgers, which is a rate of $5 per hamburger."*[1]
3. Use ratio and rate reasoning to solve real-world and mathematical problems, e.g., by reasoning about tables of equivalent ratios, tape diagrams, double number line diagrams, or equations.
   a. Make tables of equivalent ratios relating quantities with whole- number measurements, find missing values in the tables, and plot the pairs of values on the coordinate plane. Use tables to compare ratios.
   b. Solve unit rate problems including those involving unit pricing and constant speed. *For example, if it took 7 hours to mow 4 lawns, then at that rate, how many lawns could be mowed in 35 hours? At what rate were lawns being mowed?*
   c. Find a percent of a quantity as a rate per 100 (e.g., 30% of a quantity means 30/100 times the quantity); solve problems involving finding the whole, given a part and the percent.
   d. Use ratio reasoning to convert measurement units; manipulate and transform units appropriately when multiplying or dividing quantities.

The Number System 6.NS

Apply and extend previous understandings of multiplication and division to divide fractions by fractions.

1. Interpret and compute quotients of fractions, and solve word problems involving division of fractions by fractions, e.g., by using visual fraction models and equations to represent the problem. *For example, create a story context for (2/3) ÷ (3/4) and use a visual fraction model to show the quotient; use the relationship between multiplication and division to explain that (2/3) ÷ (3/4) = 8/9 because 3/4 of 8/9 is 2/3. (In general, (a/b) ÷ (c/d) = ad/bc.) How much chocolate will each person get if 3 people share 1/2 lb of chocolate equally? How many 3/4-cup servings are in 2/3 of a cup of yogurt? How wide is a rectangular strip of land with length 3/4 mi and area 1/2 square mi?*

Compute fluently with multi-digit numbers and find common factors and multiples.

2. Fluently divide multi-digit numbers using the standard algorithm.
3. Fluently add, subtract, multiply, and divide multi-digit decimals using the standard algorithm for each operation.
4. Find the greatest common factor of two whole numbers less than or equal to 100 and the least common multiple of two whole numbers less than or equal to 12. Use the distributive property to express a sum of two whole numbers 1–100 with a common factor as a multiple of a sum of two whole numbers with no common factor. *For example, express 36 + 8 as 4 (9 + 2).*

[1]Expectations for unit rates in this grade are limited to non-complex fractions.

Apply and extend previous understandings of numbers to the system of rational numbers.

5. Understand that positive and negative numbers are used together to describe quantities having opposite directions or values (e.g., temperature above/below zero, elevation above/below sea level, credits/debits, positive/negative electric charge); use positive and negative numbers to represent quantities in real-world contexts, explaining the meaning of 0 in each situation.

6. Understand a rational number as a point on the number line. Extend number line diagrams and coordinate axes familiar from previous grades to represent points on the line and in the plane with negative number coordinates.

   a. Recognize opposite signs of numbers as indicating locations on opposite sides of 0 on the number line; recognize that the opposite of the opposite of a number is the number itself, e.g., –(–3) = 3, and that 0 is its own opposite.

   b. Understand signs of numbers in ordered pairs as indicating locations in quadrants of the coordinate plane; recognize that when two ordered pairs differ only by signs, the locations of the points are related by reflections across one or both axes.

   c. Find and position integers and other rational numbers on a horizontal or vertical number line diagram; find and position pairs of integers and other rational numbers on a coordinate plane.

7. Understand ordering and absolute value of rational numbers.

   a. Interpret statements of inequality as statements about the relative position of two numbers on a number line diagram. *For example, interpret –3 > –7 as a statement that –3 is located to the right of –7 on a number line oriented from left to right.*

   b. Write, interpret, and explain statements of order for rational numbers in real-world contexts. *For example, write –3 ^{o}C > –7 ^{o}C to express the fact that –3 ^{o}C is warmer than –7 ^{o}C.*

   c. Understand the absolute value of a rational number as its distance from 0 on the number line; interpret absolute value as magnitude for a positive or negative quantity in a real-world situation. *For example, for an account balance of –30 dollars, write |–30| = 30 to describe the size of the debt in dollars.*

   d. Distinguish comparisons of absolute value from statements about order. *For example, recognize that an account balance less than –30 dollars represents a debt greater than 30 dollars.*

8. Solve real-world and mathematical problems by graphing points in all four quadrants of the coordinate plane. Include use of coordinates and absolute value to find distances between points with the same first coordinate or the same second coordinate.

Expressions and Equations	6.EE

Apply and extend previous understandings of arithmetic to algebraic expressions.

1. Write and evaluate numerical expressions involving whole-number exponents.

2. Write, read, and evaluate expressions in which letters stand for numbers.

   a. Write expressions that record operations with numbers and with letters standing for numbers. *For example, express the calculation "Subtract y from 5" as 5 – y.*

b. Identify parts of an expression using mathematical terms (sum, term, product, factor, quotient, coefficient); view one or more parts of an expression as a single entity. *For example, describe the expression 2 (8 + 7) as a product of two factors; view (8 + 7) as both a single entity and a sum of two terms.*

c. Evaluate expressions at specific values of their variables. Include expressions that arise from formulas used in real-world problems. Perform arithmetic operations, including those involving whole- number exponents, in the conventional order when there are no parentheses to specify a particular order (Order of Operations). *For example, use the formulas* $V = s^3$ *and* $A = 6 s^2$ *to find the volume and surface area of a cube with sides of length* $s = 1/2$.

3. Apply the properties of operations to generate equivalent expressions. *For example, apply the distributive property to the expression 3 (2 + x) to produce the equivalent expression 6 + 3x; apply the distributive property to the expression 24x + 18y to produce the equivalent expression 6 (4x + 3y); apply properties of operations to y + y + y to produce the equivalent expression 3y.*

4. Identify when two expressions are equivalent (i.e., when the two expressions name the same number regardless of which value is substituted into them). *For example, the expressions y + y + y and 3y are equivalent because they name the same number regardless of which number y stands for.*

Reason about and solve one-variable equations and inequalities.

5. Understand solving an equation or inequality as a process of answering a question: which values from a specified set, if any, make the equation or inequality true? Use substitution to determine whether a given number in a specified set makes an equation or inequality true.

6. Use variables to represent numbers and write expressions when solving a real-world or mathematical problem; understand that a variable can represent an unknown number, or, depending on the purpose at hand, any number in a specified set.

7. Solve real-world and mathematical problems by writing and solving equations of the form $x + p = q$ and $px = q$ for cases in which p, q and x are all nonnegative rational numbers.

8. Write an inequality of the form $x > c$ or $x < c$ to represent a constraint or condition in a real-world or mathematical problem. Recognize that inequalities of the form $x > c$ or $x < c$ have infinitely many solutions; represent solutions of such inequalities on number line diagrams.

Represent and analyze quantitative relationships between dependent and independent variables.

9. Use variables to represent two quantities in a real-world problem that change in relationship to one another; write an equation to express one quantity, thought of as the dependent variable, in terms of the other quantity, thought of as the independent variable. Analyze the relationship between the dependent and independent variables using graphs and tables, and relate these to the equation. *For example, in a problem involving motion at constant speed, list and graph ordered pairs of distances and times, and write the equation d = 65t to represent the relationship between distance and time.*

Geometry	6.G

Solve real-world and mathematical problems involving area, surface area, and volume.

1. Find the area of right triangles, other triangles, special quadrilaterals, and polygons by composing into rectangles or decomposing into triangles and other shapes; apply these techniques in the context of solving real-world and mathematical problems.

2. Find the volume of a right rectangular prism with fractional edge lengths by packing it with unit cubes of the appropriate unit fraction edge lengths, and show that the volume is the same as would be found by multiplying the edge lengths of the prism. Apply the formulas $V = l\ w\ h$ and $V = b\ h$ to find volumes of right rectangular prisms with fractional edge lengths in the context of solving real-world and mathematical problems.
3. Draw polygons in the coordinate plane given coordinates for the vertices; use coordinates to find the length of a side joining points with the same first coordinate or the same second coordinate. Apply these techniques in the context of solving real-world and mathematical problems.
4. Represent three-dimensional figures using nets made up of rectangles and triangles, and use the nets to find the surface area of these figures. Apply these techniques in the context of solving real-world and mathematical problems.

Statistics and Probability 6.SP

Develop understanding of statistical variability.

1. Recognize a statistical question as one that anticipates variability in the data related to the question and accounts for it in the answers. *For example, "How old am I?" is not a statistical question, but "How old are the students in my school?" is a statistical question because one anticipates variability in students' ages.*
2. Understand that a set of data collected to answer a statistical question has a distribution which can be described by its center, spread, and overall shape.
3. Recognize that a measure of center for a numerical data set summarizes all of its values with a single number, while a measure of variation describes how its values vary with a single number.

Summarize and describe distributions.

4. Display numerical data in plots on a number line, including dot plots, histograms, and box plots.
5. Summarize numerical data sets in relation to their context, such as by:
   a. Reporting the number of observations.
   b. Describing the nature of the attribute under investigation, including how it was measured and its units of measurement.
   c. Giving quantitative measures of center (median and/or mean) and variability (interquartile range and/or mean absolute deviation), as well as describing any overall pattern and any striking deviations from the overall pattern with reference to the context in which the data were gathered.
   d. Relating the choice of measures of center and variability to the shape of the data distribution and the context in which the data were gathered.

Mathematics | Grade 7

In Grade 7, instructional time should focus on four critical areas: (1) developing understanding of and applying proportional relationships; (2) developing understanding of operations with rational numbers and working with expressions and linear equations; (3) solving problems involving scale drawings and informal geometric constructions, and working with two- and three-dimensional shapes to solve problems involving area, surface area, and volume; and (4) drawing inferences about populations based on samples.

(1) Students extend their understanding of ratios and develop understanding of proportionality to solve single- and multi-step problems. Students use their understanding of ratios and proportionality to solve a wide variety of percent problems, including those involving discounts, interest, taxes, tips, and percent increase or decrease. Students solve problems about scale drawings by relating corresponding lengths between the objects or by using the fact that relationships of lengths within an object are preserved in similar objects. Students graph proportional relationships and understand the unit rate informally as a measure of the steepness of the related line, called the slope. They distinguish proportional relationships from other relationships.

(2) Students develop a unified understanding of number, recognizing fractions, decimals (that have a finite or a repeating decimal representation), and percents as different representations of rational numbers. Students extend addition, subtraction, multiplication, and division to all rational numbers, maintaining the properties of operations and the relationships between addition and subtraction, and multiplication and division. By applying these properties, and by viewing negative numbers in terms of everyday contexts (e.g., amounts owed or temperatures below zero), students explain and interpret the rules for adding, subtracting, multiplying, and dividing with negative numbers. They use the arithmetic of rational numbers as they formulate expressions and equations in one variable and use these equations to solve problems.

(3) Students continue their work with area from Grade 6, solving problems involving the area and circumference of a circle and surface area of three-dimensional objects. In preparation for work on congruence and similarity in Grade 8 they reason about relationships among two-dimensional figures using scale drawings and informal geometric constructions, and they gain familiarity with the relationships between angles formed by intersecting lines. Students work with three-dimensional figures, relating them to two- dimensional figures by examining cross-sections. They solve real-world and mathematical problems involving area, surface area, and volume of two- and three-dimensional objects composed of triangles, quadrilaterals, polygons, cubes and right prisms.

(4) Students build on their previous work with single data distributions to compare two data distributions and address questions about differences between populations. They begin informal work with random sampling to generate data sets and learn about the importance of representative samples for drawing inferences.

Grade 7 Overview

Ratios and Proportional Relationships

- Analyze proportional relationships and use them to solve real-world and mathematical problems.

The Number System

- Apply and extend previous understandings of operations with fractions to add, subtract, multiply, and divide rational numbers.

Expressions and Equations

- Use properties of operations to generate equivalent expressions.
- Solve real-life and mathematical problems using numerical and algebraic expressions and equations.

Geometry

- Draw, construct and describe geometrical figures and describe the relationships between them.
- Solve real-life and mathematical problems involving angle measure, area, surface area, and volume.

Statistics and Probability

- Use random sampling to draw inferences about a population.
- Draw informal comparative inferences about two populations.
- Investigate chance processes and develop, use, and evaluate probability models.

Mathematical Practices

1. Make sense of problems and persevere in solving them.
2. Reason abstractly and quantitatively.
3. Construct viable arguments and critique the reasoning of others.
4. Model with mathematics.
5. Use appropriate tools strategically.
6. Attend to precision.
7. Look for and make use of structure.
8. Look for and express regularity in repeated reasoning.

Ratios and Proportional Relationships 7.RP

Analyze proportional relationships and use them to solve real-world and mathematical problems.

1. Compute unit rates associated with ratios of fractions, including ratios of lengths, areas and other quantities measured in like or different units. *For example, if a person walks 1/2 mile in each 1/4 hour, compute the unit rate as the complex fraction* $^{1/2}/_{1/4}$ *miles per hour, equivalently 2 miles per hour.*

2. Recognize and represent proportional relationships between quantities.
   a. Decide whether two quantities are in a proportional relationship, e.g., by testing for equivalent ratios in a table or graphing on a coordinate plane and observing whether the graph is a straight line through the origin.
   b. Identify the constant of proportionality (unit rate) in tables, graphs, equations, diagrams, and verbal descriptions of proportional relationships.
   c. Represent proportional relationships by equations. *For example, if total cost t is proportional to the number n of items purchased at a constant price p, the relationship between the total cost and the number of items can be expressed as t = pn.*
   d. Explain what a point *(x, y)* on the graph of a proportional relationship means in terms of the situation, with special attention to the points (0, 0) and (1, *r)* where *r* is the unit rate.

3. Use proportional relationships to solve multistep ratio and percent problems. *Examples: simple interest, tax, markups and markdowns, gratuities and commissions, fees, percent increase and decrease, percent error.*

The Number System 7.NS

Apply and extend previous understandings of operations with fractions to add, subtract, multiply, and divide rational numbers.

1. Apply and extend previous understandings of addition and subtraction to add and subtract rational numbers; represent addition and subtraction on a horizontal or vertical number line diagram.
   a. Describe situations in which opposite quantities combine to make 0. *For example, a hydrogen atom has 0 charge because its two constituents are oppositely charged.*
   b. Understand *p* + *q* as the number located a distance |*q*| from *p*, in the positive or negative direction depending on whether *q* is positive or negative. Show that a number and its opposite have a sum of 0 (are additive inverses). Interpret sums of rational numbers by describing real-world contexts.
   c. Understand subtraction of rational numbers as adding the additive inverse, *p* – *q* = *p* + (–*q*). Show that the distance between two rational numbers on the number line is the absolute value of their difference, and apply this principle in real-world contexts.
   d. Apply properties of operations as strategies to add and subtract rational numbers.[1]

2. Apply and extend previous understandings of multiplication and division and of fractions to multiply and divide rational numbers.
   a. Understand that multiplication is extended from fractions to rational numbers by requiring that operations continue to satisfy the properties of operations, particularly the distributive property, leading to products such as (–1)(–1) = 1 and the rules for multiplying signed numbers. Interpret products of rational numbers by describing real-world contexts.

[1] See Glossary, Table 3

b. Understand that integers can be divided, provided that the divisor is not zero, and every quotient of integers (with non-zero divisor) is a rational number. If p and q are integers, then $-(p/q) = (-p)/q = p/(-q)$. Interpret quotients of rational numbers by describing real- world contexts.

c. Apply properties of operations as strategies to multiply and divide rational numbers.

d. Convert a rational number to a decimal using long division; know that the decimal form of a rational number terminates in 0s or eventually repeats.

3. Solve real-world and mathematical problems involving the four operations with rational numbers.[1]

Expressions and Equations 7.EE

Use properties of operations to generate equivalent expressions.

1. Apply properties of operations as strategies to add, subtract, factor, and expand linear expressions with rational coefficients.
2. Understand that rewriting an expression in different forms in a problem context can shed light on the problem and how the quantities in it are related. *For example, a + 0.05a = 1.05a means that "increase by 5%" is the same as "multiply by 1.05."*

Solve real-life and mathematical problems using numerical and algebraic expressions and equations.

3. Solve multi-step real-life and mathematical problems posed with positive and negative rational numbers in any form (whole numbers, fractions, and decimals), using tools strategically. Apply properties of operations to calculate with numbers in any form; convert between forms as appropriate; and assess the reasonableness of answers using mental computation and estimation strategies. *For example: If a woman making $25 an hour gets a 10% raise, she will make an additional 1/10 of her salary an hour, or $2.50, for a new salary of $27.50. If you want to place a towel bar 9 3/4 inches long in the center of a door that is 27 1/2 inches wide, you will need to place the bar about 9 inches from each edge; this estimate can be used as a check on the exact computation.*
4. Use variables to represent quantities in a real-world or mathematical problem, and construct simple equations and inequalities to solve problems by reasoning about the quantities.

   a. Solve word problems leading to equations of the form $px + q = r$ and $p(x + q) = r$, where p, q, and r are specific rational numbers. Solve equations of these forms fluently. Compare an algebraic solution to an arithmetic solution, identifying the sequence of the operations used in each approach. *For example, the perimeter of a rectangle is 54 cm. Its length is 6 cm. What is its width?*

   b. Solve word problems leading to inequalities of the form $px + q > r$ or $px + q < r$, where p, q, and r are specific rational numbers. Graph the solution set of the inequality and interpret it in the context of the problem. *For example: As a salesperson, you are paid $50 per week plus $3 per sale. This week you want your pay to be at least $100. Write an inequality for the number of sales you need to make, and describe the solutions.*

Geometry 7.G

Draw, construct, and describe geometrical figures and describe the relationships between them.

1. Solve problems involving scale drawings of geometric figures, including computing actual lengths and areas from a scale drawing and reproducing a scale drawing at a different scale.

[1]Computations with rational numbers extend the rules for manipulating fractions to complex fractions.

2. Draw (freehand, with ruler and protractor, and with technology) geometric shapes with given conditions. Focus on constructing triangles from three measures of angles or sides, noticing when the conditions determine a unique triangle, more than one triangle, or no triangle.
3. Describe the two-dimensional figures that result from slicing three- dimensional figures, as in plane sections of right rectangular prisms and right rectangular pyramids.

Solve real-life and mathematical problems involving angle measure, area, surface area, and volume.

4. Know the formulas for the area and circumference of a circle and use them to solve problems; give an informal derivation of the relationship between the circumference and area of a circle.
5. Use facts about supplementary, complementary, vertical, and adjacent angles in a multi-step problem to write and solve simple equations for an unknown angle in a figure.
6. Solve real-world and mathematical problems involving area, volume and surface area of two- and three-dimensional objects composed of triangles, quadrilaterals, polygons, cubes, and right prisms.

Statistics and Probability 7.SP

Use random sampling to draw inferences about a population.

1. Understand that statistics can be used to gain information about a population by examining a sample of the population; generalizations about a population from a sample are valid only if the sample is representative of that population. Understand that random sampling tends to produce representative samples and support valid inferences.
2. Use data from a random sample to draw inferences about a population with an unknown characteristic of interest. Generate multiple samples (or simulated samples) of the same size to gauge the variation in estimates or predictions. *For example, estimate the mean word length in a book by randomly sampling words from the book; predict the winner of a school election based on randomly sampled survey data. Gauge how far off the estimate or prediction might be.*

Draw informal comparative inferences about two populations.

3. Informally assess the degree of visual overlap of two numerical data distributions with similar variabilities, measuring the difference between the centers by expressing it as a multiple of a measure of variability. *For example, the mean height of players on the basketball team is 10 cm greater than the mean height of players on the soccer team, about twice the variability (mean absolute deviation) on either team; on a dot plot, the separation between the two distributions of heights is noticeable.*
4. Use measures of center and measures of variability for numerical data from random samples to draw informal comparative inferences about two populations. *For example, decide whether the words in a chapter of a seventh-grade science book are generally longer than the words in a chapter of a fourth-grade science book.*

Investigate chance processes and develop, use, and evaluate probability models.

5. Understand that the probability of a chance event is a number between 0 and 1 that expresses the likelihood of the event occurring. Larger numbers indicate greater likelihood. A probability near 0 indicates an unlikely event, a probability around 1/2 indicates an event that is neither unlikely nor likely, and a probability near 1 indicates a likely event.

6. Approximate the probability of a chance event by collecting data on the chance process that produces it and observing its long-run relative frequency, and predict the approximate relative frequency given the probability. *For example, when rolling a number cube 600 times, predict that a 3 or 6 would be rolled roughly 200 times, but probably not exactly 200 times.*

7. Develop a probability model and use it to find probabilities of events. Compare probabilities from a model to observed frequencies; if the agreement is not good, explain possible sources of the discrepancy.

   a. Develop a uniform probability model by assigning equal probability to all outcomes, and use the model to determine probabilities of events. *For example, if a student is selected at random from a class, find the probability that Jane will be selected and the probability that a girl will be selected.*

   b. Develop a probability model (which may not be uniform) by observing frequencies in data generated from a chance process. *For example, find the approximate probability that a spinning penny will land heads up or that a tossed paper cup will land open-end down. Do the outcomes for the spinning penny appear to be equally likely based on the observed frequencies?*

8. Find probabilities of compound events using organized lists, tables, tree diagrams, and simulation.

   a. Understand that, just as with simple events, the probability of a compound event is the fraction of outcomes in the sample space for which the compound event occurs.

   b. Represent sample spaces for compound events using methods such as organized lists, tables and tree diagrams. For an event described in everyday language (e.g., “rolling double sixes”), identify the outcomes in the sample space which compose the event.

   c. Design and use a simulation to generate frequencies for compound events. *For example, use random digits as a simulation tool to approximate the answer to the question: If 40% of donors have type A blood, what is the probability that it will take at least 4 donors to find one with type A blood?*

Mathematics | Grade 8

In Grade 8, instructional time should focus on three critical areas: (1) formulating and reasoning about expressions and equations, including modeling an association in bivariate data with a linear equation, and solving linear equations and systems of linear equations; (2) grasping the concept of a function and using functions to describe quantitative relationships; (3) analyzing two- and three-dimensional space and figures using distance, angle, similarity, and congruence, and understanding and applying the Pythagorean Theorem.

(1) Students use linear equations and systems of linear equations to represent, analyze, and solve a variety of problems. Students recognize equations for proportions ($y/x = m$ or $y = mx$) as special linear equations ($y = mx + b$), understanding that the constant of proportionality (m) is the slope, and the graphs are lines through the origin. They understand that the slope (m) of a line is a constant rate of change, so that if the input or x-coordinate changes by an amount A, the output or y-coordinate changes by the amount $m \cdot A$. Students also use a linear equation to describe the association between two quantities in bivariate data (such as arm span vs. height for students in a classroom). At this grade, fitting the model, and assessing its fit to the data are done informally. Interpreting the model in the context of the data requires students to express a relationship between the two quantities in question and to interpret components of the relationship (such as slope and y-intercept) in terms of the situation.

Students strategically choose and efficiently implement procedures to solve linear equations in one variable, understanding that when they use the properties of equality and the concept of logical equivalence, they maintain the solutions of the original equation. Students solve systems of two linear equations in two variables and relate the systems to pairs of lines in the plane; these intersect, are parallel, or are the same line. Students use linear equations, systems of linear equations, linear functions, and their understanding of slope of a line to analyze situations and solve problems.

(2) Students grasp the concept of a function as a rule that assigns to each input exactly one output. They understand that functions describe situations where one quantity determines another. They can translate among representations and partial representations of functions (noting that tabular and graphical representations may be partial representations), and they describe how aspects of the function are reflected in the different representations.

(3) Students use ideas about distance and angles, how they behave under translations, rotations, reflections, and dilations, and ideas about congruence and similarity to describe and analyze two-dimensional figures and to solve problems. Students show that the sum of the angles in a triangle is the angle formed by a straight line, and that various configurations of lines give rise to similar triangles because of the angles created when a transversal cuts parallel lines. Students understand the statement of the Pythagorean Theorem and its converse, and can explain why the Pythagorean Theorem holds, for example, by decomposing a square in two different ways. They apply the Pythagorean Theorem to find distances between points on the coordinate plane, to find lengths, and to analyze polygons. Students complete their work on volume by solving problems involving cones, cylinders, and spheres.

Grade 8 Overview

The Number System

- Know that there are numbers that are not rational, and approximate them by rational numbers.

Expressions and Equations

- Work with radicals and integer exponents.
- Understand the connections between proportional relationships, lines, and linear equations.
- Analyze and solve linear equations and pairs of simultaneous linear equations.

Functions

- Define, evaluate, and compare functions.
- Use functions to model relationships between quantities.

Geometry

- Understand congruence and similarity using physical models, transparencies, or geometry software.
- Understand and apply the Pythagorean theorem.
- Solve real-world and mathematical problems involving volume of cylinders, cones and spheres.

Statistics and Probability

- Investigate patterns of association in bivariate data.

Mathematical Practices

1. Make sense of problems and persevere in solving them.
2. Reason abstractly and quantitatively.
3. Construct viable arguments and critique the reasoning of others.
4. Model with mathematics.
5. Use appropriate tools strategically.
6. Attend to precision.
7. Look for and make use of structure.
8. Look for and express regularity in repeated reasoning.

The Number System 8.NS

Know that there are numbers that are not rational, and approximate them by rational numbers.

1. Know that numbers that are not rational are called irrational. Understand informally that every number has a decimal expansion; for rational numbers show that the decimal expansion repeats eventually, and convert a decimal expansion which repeats eventually into a rational number.
2. Use rational approximations of irrational numbers to compare the size of irrational numbers, locate them approximately on a number line diagram, and estimate the value of expressions (e.g., π^2). *For example, by truncating the decimal expansion of* $\sqrt{2}$*, show that* $\sqrt{2}$ *is between 1 and 2, then between 1.4 and 1.5, and explain how to continue on to get better approximations.*

Expressions and Equations 8.EE

Work with radicals and integer exponents.

1. Know and apply the properties of integer exponents to generate equivalent numerical expressions. *For example,* $3^2 \times 3^{-5} = 3^{-3} = 1/3^3 = 1/27$.
2. Use square root and cube root symbols to represent solutions to equations of the form $x^2 = p$ and $x^3 = p$, where p is a positive rational number. Evaluate square roots of small perfect squares and cube roots of small perfect cubes. Know that $\sqrt{2}$ is irrational.
3. Use numbers expressed in the form of a single digit times an integer power of 10 to estimate very large or very small quantities, and to express how many times as much one is than the other. *For example, estimate the population of the United States as* 3×10^8 *and the population of the world as* 7×10^9*, and determine that the world population is more than 20 times larger.*
4. Perform operations with numbers expressed in scientific notation, including problems where both decimal and scientific notation are used. Use scientific notation and choose units of appropriate size for measurements of very large or very small quantities (e.g., use millimeters per year for seafloor spreading). Interpret scientific notation that has been generated by technology.

Understand the connections between proportional relationships, lines, and linear equations.

5. Graph proportional relationships, interpreting the unit rate as the slope of the graph. Compare two different proportional relationships represented in different ways. *For example, compare a distance-time graph to a distance-time equation to determine which of two moving objects has greater speed.*
6. Use similar triangles to explain why the slope m is the same between any two distinct points on a non-vertical line in the coordinate plane; derive the equation $y = mx$ for a line through the origin and the equation $y = mx + b$ for a line intercepting the vertical axis at b.

Analyze and solve linear equations and pairs of simultaneous linear equations.

7. Solve linear equations in one variable.
   a. Give examples of linear equations in one variable with one solution, infinitely many solutions, or no solutions. Show which of these possibilities is the case by successively transforming the given equation into simpler forms, until an equivalent equation of the form $x = a$, $a = a$, or $a = b$ results (where a and b are different numbers).
   b. Solve linear equations with rational number coefficients, including equations whose solutions require expanding expressions using the distributive property and collecting like terms.

8. Analyze and solve pairs of simultaneous linear equations.
   a. Understand that solutions to a system of two linear equations in two variables correspond to points of intersection of their graphs, because points of intersection satisfy both equations simultaneously.
   b. Solve systems of two linear equations in two variables algebraically, and estimate solutions by graphing the equations. Solve simple cases by inspection. *For example, $3x + 2y = 5$ and $3x + 2y = 6$ have no solution because $3x + 2y$ cannot simultaneously be 5 and 6.*
   c. Solve real-world and mathematical problems leading to two linear equations in two variables. *For example, given coordinates for two pairs of points, determine whether the line through the first pair of points intersects the line through the second pair.*

Functions	8.F

Define, evaluate, and compare functions.

1. Understand that a function is a rule that assigns to each input exactly one output. The graph of a function is the set of ordered pairs consisting of an input and the corresponding output.[1]
2. Compare properties of two functions each represented in a different way (algebraically, graphically, numerically in tables, or by verbal descriptions). *For example, given a linear function represented by a table of values and a linear function represented by an algebraic expression, determine which function has the greater rate of change.*
3. Interpret the equation $y = mx + b$ as defining a linear function, whose graph is a straight line; give examples of functions that are not linear. *For example, the function $A = s^2$ giving the area of a square as a function of its side length is not linear because its graph contains the points (1,1), (2,4) and (3,9), which are not on a straight line.*

Use functions to model relationships between quantities.

4. Construct a function to model a linear relationship between two quantities. Determine the rate of change and initial value of the function from a description of a relationship or from two (x, y) values, including reading these from a table or from a graph. Interpret the rate of change and initial value of a linear function in terms of the situation it models, and in terms of its graph or a table of values.
5. Describe qualitatively the functional relationship between two quantities by analyzing a graph (e.g., where the function is increasing or decreasing, linear or nonlinear). Sketch a graph that exhibits the qualitative features of a function that has been described verbally.

Geometry	8.G

Understand congruence and similarity using physical models, transparencies, or geometry software.

1. Verify experimentally the properties of rotations, reflections, and translations:
   a. Lines are taken to lines, and line segments to line segments of the same length.
   b. Angles are taken to angles of the same measure.
   c. Parallel lines are taken to parallel lines.
2. Understand that a two-dimensional figure is congruent to another if the second can be obtained from the first by a sequence of rotations, reflections, and translations; given two congruent figures, describe a sequence that exhibits the congruence between them.

[1]Function notation is not required in Grade 8.

3. Describe the effect of dilations, translations, rotations, and reflections on two-dimensional figures using coordinates.

4. Understand that a two-dimensional figure is similar to another if the second can be obtained from the first by a sequence of rotations, reflections, translations, and dilations; given two similar two- dimensional figures, describe a sequence that exhibits the similarity between them.

5. Use informal arguments to establish facts about the angle sum and exterior angle of triangles, about the angles created when parallel lines are cut by a transversal, and the angle-angle criterion for similarity of triangles. *For example, arrange three copies of the same triangle so that the sum of the three angles appears to form a line, and give an argument in terms of transversals why this is so.*

Understand and apply the Pythagorean Theorem.

6. Explain a proof of the Pythagorean Theorem and its converse.

7. Apply the Pythagorean Theorem to determine unknown side lengths in right triangles in real-world and mathematical problems in two and three dimensions.

8. Apply the Pythagorean Theorem to find the distance between two points in a coordinate system.

Solve real-world and mathematical problems involving volume of cylinders, cones, and spheres.

9. Know the formulas for the volumes of cones, cylinders, and spheres and use them to solve real-world and mathematical problems.

Statistics and Probability 8.SP

Investigate patterns of association in bivariate data.

1. Construct and interpret scatter plots for bivariate measurement data to investigate patterns of association between two quantities. Describe patterns such as clustering, outliers, positive or negative association, linear association, and nonlinear association.

2. Know that straight lines are widely used to model relationships between two quantitative variables. For scatter plots that suggest a linear association, informally fit a straight line, and informally assess the model fit by judging the closeness of the data points to the line.

3. Use the equation of a linear model to solve problems in the context of bivariate measurement data, interpreting the slope and intercept. *For example, in a linear model for a biology experiment, interpret a slope of 1.5 cm/hr as meaning that an additional hour of sunlight each day is associated with an additional 1.5 cm in mature plant height.*

4. Understand that patterns of association can also be seen in bivariate categorical data by displaying frequencies and relative frequencies in a two-way table. Construct and interpret a two-way table summarizing data on two categorical variables collected from the same subjects. Use relative frequencies calculated for rows or columns to describe possible association between the two variables. *For example, collect data from students in your class on whether or not they have a curfew on school nights and whether or not they have assigned chores at home. Is there evidence that those who have a curfew also tend to have chores?*

Mathematics Standards for High School

The high school standards specify the mathematics that all students should study in order to be college and career ready. Additional mathematics that students should learn in order to take advanced courses such as calculus, advanced statistics, or discrete mathematics is indicated by (+), as in this example:

(+) Represent complex numbers on the complex plane in rectangular and polar form (including real and imaginary numbers).

All standards without a (+) symbol should be in the common mathematics curriculum for all college and career ready students. Standards with a (+) symbol may also appear in courses intended for all students.

The high school standards are listed in conceptual categories:

- Number and Quantity
- Algebra
- Functions
- Modeling
- Geometry
- Statistics and Probability

Conceptual categories portray a coherent view of high school mathematics; a student's work with functions, for example, crosses a number of traditional course boundaries, potentially up through and including calculus.

Modeling is best interpreted not as a collection of isolated topics but in relation to other standards. Making mathematical models is a Standard for Mathematical Practice, and specific modeling standards appear throughout the high school standards indicated by a star symbol (★). The star symbol sometimes appears on the heading for a group of standards; in that case, it should be understood to apply to all standards in that group.

Mathematics | High School - Number and Quantity

Numbers and Number Systems. During the years from kindergarten to eighth grade, students must repeatedly extend their conception of number. At first, "number" means "counting number": 1, 2, 3... Soon after that, 0 is used to represent "none" and the whole numbers are formed by the counting numbers together with zero. The next extension is fractions. At first, fractions are barely numbers and tied strongly to pictorial representations. Yet by the time students understand division of fractions, they have a strong concept of fractions as numbers and have connected them, via their decimal representations, with the base-ten system used to represent the whole numbers. During middle school, fractions are augmented by negative fractions to form the rational numbers. In Grade 8, students extend this system once more, augmenting the rational numbers with the irrational numbers to form the real numbers. In high school, students will be exposed to yet another extension of number, when the real numbers are augmented by the imaginary numbers to form the complex numbers.

With each extension of number, the meanings of addition, subtraction, multiplication, and division are extended. In each new number system—integers, rational numbers, real numbers, and complex numbers—the four operations stay the same in two important ways: They have the commutative, associative, and distributive properties and their new meanings are consistent with their previous meanings.

Extending the properties of whole-number exponents leads to new and productive notation. For example, properties of whole-number exponents suggest that $(5^{1/3})^3$ should be $5^{(1/3)3} = 5^1 = 5$ and that $5^{1/3}$ should be the cube root of 5.

Calculators, spreadsheets, and computer algebra systems can provide ways for students to become better acquainted with these new number systems and their notation. They can be used to generate data for numerical experiments, to help understand the workings of matrix, vector, and complex number algebra, and to experiment with non-integer exponents.

Quantities. In real world problems, the answers are usually not numbers but quantities: numbers with units, which involves measurement. In their work in measurement up through Grade 8, students primarily measure commonly used attributes such as length, area, and volume. In high school, students encounter a wider variety of units in modeling, e.g., acceleration, currency conversions, derived quantities such as person-hours and heating degree days, social science rates such as per-capita income, and rates in everyday life such as points scored per game or batting averages. They also encounter novel situations in which they themselves must conceive the attributes of interest. For example, to find a good measure of overall highway safety, they might propose measures such as fatalities per year, fatalities per year per driver, or fatalities per vehicle-mile traveled. Such a conceptual process is sometimes called quantification. Quantification is important for science, as when surface area suddenly "stands out" as an important variable in evaporation. Quantification is also important for companies, which must conceptualize relevant attributes and create or choose suitable measures for them.

Number and Quantity Overview

The Real Number System

- Extend the properties of exponents to rational exponents
- Use properties of rational and irrational numbers.

Quantities

- Reason quantitatively and use units to solve problems

The Complex Number System

- Perform arithmetic operations with complex numbers
- Represent complex numbers and their operations on the complex plane
- Use complex numbers in polynomial identities and equations

Vector and Matrix Quantities

- Represent and model with vector quantities.
- Perform operations on vectors.
- Perform operations on matrices and use matrices in applications.

Mathematical Practices

1. Make sense of problems and persevere in solving them.
2. Reason abstractly and quantitatively.
3. Construct viable arguments and critique the reasoning of others.
4. Model with mathematics.
5. Use appropriate tools strategically.
6. Attend to precision.
7. Look for and make use of structure.
8. Look for and express regularity in repeated reasoning.

The Real Number System — N-RN

Extend the properties of exponents to rational exponents.

1. Explain how the definition of ~~the meaning of~~ rational exponents follows from extending the properties of integer exponents to those values, allowing for a notation for radicals in terms of rational exponents. *For example, we define* $5^{1/3}$ *to be the cube root of 5 because we want* $(5^{1/3})^3 = 5^{(1/3)3}$ *to hold, so* $(5^{1/3})^3$ *must equal 5.*
2. Rewrite expressions involving radicals and rational exponents using the properties of exponents.

Use properties of rational and irrational numbers.

3. Explain why the sum or product of two rational numbers is rational; that the sum of a rational number and an irrational number is irrational; and that the product of a nonzero rational number and an irrational number is irrational.

Quantities★ — N-Q

Reason quantitatively and use units to solve problems.

1. Use units as a way to understand problems and to guide the solution of multi-step problems; choose and interpret units consistently in formulas; choose and interpret the scale and the origin in graphs and data displays.
2. Define appropriate quantities for the purpose of descriptive modeling.
3. Choose a level of accuracy appropriate to limitations on measurement when reporting quantities.

The Complex Number System — N-CN

Perform arithmetic operations with complex numbers.

1. Know there is a complex number i such that $i^2 = -1$, and every complex number has the form $a + bi$ with a and b real.
2. Use the relation $i^2 = -1$ and the commutative, associative, and distributive properties to add, subtract, and multiply complex numbers.
3. (+) Find the conjugate of a complex number; use conjugates to find moduli and quotients of complex numbers.

Represent complex numbers and their operations on the complex plane.

4. (+) Represent complex numbers on the complex plane in rectangular and polar form (including real and imaginary numbers), and explain why the rectangular and polar forms of a given complex number represent the same number.
5. (+) Represent addition, subtraction, multiplication, and conjugation of complex numbers geometrically on the complex plane; use properties of this representation for computation. *For example,* $(-1 + \sqrt{3}\,i)^3 = 8$ *because* $(-1 + \sqrt{3}\,i)$ *has modulus* 2 *and argument* 120°.
6. (+) Calculate the distance between numbers in the complex plane as the modulus of the difference, and the midpoint of a segment as the average of the numbers at its endpoints.

Use complex numbers in polynomial identities and equations.

7. Solve quadratic equations with real coefficients that have complex solutions.
8. (+) Extend polynomial identities to the complex numbers. *For example, rewrite* $x^2 + 4$ *as* $(x + 2i)(x - 2i)$.
9. (+) Know the Fundamental Theorem of Algebra; show that it is true for quadratic polynomials.

Vector and Matrix Quantities N-VM

Represent and model with vector quantities.

1. (+) Recognize vector quantities as having both magnitude and direction. Represent vector quantities by directed line segments, and use appropriate symbols for vectors and their magnitudes (e.g., ***v***, |***v***|, ||***v***||, *v*).
2. (+) Find the components of a vector by subtracting the coordinates of an initial point from the coordinates of a terminal point.
3. (+) Solve problems involving velocity and other quantities that can be represented by vectors.

Perform operations on vectors.

4. (+) Add and subtract vectors.
   a. Add vectors end-to-end, component-wise, and by the parallelogram rule. Understand that the magnitude of a sum of two vectors is typically not the sum of the magnitudes.
   b. Given two vectors in magnitude and direction form, determine the magnitude and direction of their sum.
   c. Understand vector subtraction ***v*** – ***w*** as ***v*** + (–***w***), where –***w*** is the additive inverse of ***w***, with the same magnitude as ***w*** and pointing in the opposite direction. Represent vector subtraction graphically by connecting the tips in the appropriate order, and perform vector subtraction component-wise.
5. (+) Multiply a vector by a scalar.
   a. Represent scalar multiplication graphically by scaling vectors and possibly reversing their direction; perform scalar multiplication component-wise, e.g., as $c(v_x, v_y) = (cv_x, cv_y)$.
   b. Compute the magnitude of a scalar multiple *c**v*** using ||*c**v***|| = |*c*|*v*. Compute the direction of *c**v*** knowing that when |*c*|*v* ≠ 0, the direction of *c**v*** is either along ***v*** (for *c* > 0) or against ***v*** (for *c* < 0).

Perform operations on matrices and use matrices in applications.

6. (+) Use matrices to represent and manipulate data, e.g., to represent payoffs or incidence relationships in a network.
7. (+) Multiply matrices by scalars to produce new matrices, e.g., as when all of the payoffs in a game are doubled.
8. (+) Add, subtract, and multiply matrices of appropriate dimensions.
9. (+) Understand that, unlike multiplication of numbers, matrix multiplication for square matrices is not a commutative operation, but still satisfies the associative and distributive properties.
10. (+) Understand that the zero and identity matrices play a role in matrix addition and multiplication similar to the role of 0 and 1 in the real numbers. The determinant of a square matrix is nonzero if and only if the matrix has a multiplicative inverse.
11. (+) Multiply a vector (regarded as a matrix with one column) by a matrix of suitable dimensions to produce another vector. Work with matrices as transformations of vectors.
12. (+) Work with 2 × 2 matrices as transformations of the plane, and interpret the absolute value of the determinant in terms of area.

Mathematics | High School - Algebra

Expressions. An expression is a record of a computation with numbers, symbols that represent numbers, arithmetic operations, exponentiation, and, at more advanced levels, the operation of evaluating a function. Conventions about the use of parentheses and the order of operations assure that each expression is unambiguous. Creating an expression that describes a computation involving a general quantity requires the ability to express the computation in general terms, abstracting from specific instances.

Reading an expression with comprehension involves analysis of its underlying structure. This may suggest a different but equivalent way of writing the expression that exhibits some different aspect of its meaning. For example, $p + 0.05p$ can be interpreted as the addition of a 5% tax to a price p. Rewriting $p + 0.05p$ as $1.05p$ shows that adding a tax is the same as multiplying the price by a constant factor.

Algebraic manipulations are governed by the properties of operations and exponents, and the conventions of algebraic notation. At times, an expression is the result of applying operations to simpler expressions. For example, $p + 0.05p$ is the sum of the simpler expressions p and $0.05p$. Viewing an expression as the result of operation on simpler expressions can sometimes clarify its underlying structure.

A spreadsheet or a computer algebra system (CAS) can be used to experiment with algebraic expressions, perform complicated algebraic manipulations, and understand how algebraic manipulations behave.

Equations and inequalities. An equation is a statement of equality between two expressions, often viewed as a question asking for which values of the variables the expressions on either side are in fact equal. These values are the solutions to the equation. An identity, in contrast, is true for all values of the variables; identities are often developed by rewriting an expression in an equivalent form.

The solutions of an equation in one variable form a set of numbers; the solutions of an equation in two variables form a set of ordered pairs of numbers, which can be plotted in the coordinate plane. Two or more equations and/or inequalities form a system. A solution for such a system must satisfy every equation and inequality in the system.

An equation can often be solved by successively deducing from it one or more simpler equations. For example, one can add the same constant to both sides without changing the solutions, but squaring both sides might lead to extraneous solutions. Strategic competence in solving includes looking ahead for productive manipulations and anticipating the nature and number of solutions.

Some equations have no solutions in a given number system, but have a solution in a larger system. For example, the solution of $x + 1 = 0$ is an integer, not a whole number; the solution of $2x + 1 = 0$ is a rational number, not an integer; the solutions of $x^2 – 2 = 0$ are real numbers, not rational numbers; and the solutions of $x^2 + 2 = 0$ are complex numbers, not real numbers.

The same solution techniques used to solve equations can be used to rearrange formulas. For example, the formula for the area of a trapezoid, $A = ((b_1+b_2)/2)h$, can be solved for h using the same deductive process.

Inequalities can be solved by reasoning about the properties of inequality. Many, but not all, of the properties of equality continue to hold for inequalities and can be useful in solving them.

Connections to Functions and Modeling. Expressions can define functions, and equivalent expressions define the same function. Asking when two functions have the same value for the same input leads to an equation; graphing the two functions allows for finding approximate solutions of the equation. Converting a verbal description to an equation, inequality, or system of these is an essential skill in modeling.

Algebra Overview

Seeing Structure in Expressions

- Interpret the structure of expressions
- Write expressions in equivalent forms to solve problems

Arithmetic with Polynomials and Rational Expressions

- Perform arithmetic operations on polynomials
- Understand the relationship between zeros and factors of polynomials
- Use polynomial identities to solve problems
- Rewrite rational expressions

Creating Equations

- Create equations that describe numbers or relationships

Reasoning with Equations and Inequalities

- Understand solving equations as a process of reasoning and explain the reasoning
- Solve equations and inequalities in one variable
- Solve systems of equations
- Represent and solve equations and inequalities graphically

Mathematical Practices

1. Make sense of problems and persevere in solving them.
2. Reason abstractly and quantitatively.
3. Construct viable arguments and critique the reasoning of others.
4. Model with mathematics.
5. Use appropriate tools strategically.
6. Attend to precision.
7. Look for and make use of structure.
8. Look for and express regularity in repeated reasoning.

Seeing Structure in Expressions A-SSE

Interpret the structure of expressions

1. Interpret expressions that represent a quantity in terms of its context.★
   a. Interpret parts of an expression, such as terms, factors, and coefficients.
   b. Interpret complicated expressions by viewing one or more of their parts as a single entity. *For example, interpret* $P(1+r)^n$ *as the product of P and a factor not depending on P.*
2. Use the structure of an expression to identify ways to rewrite it. *For example, see* $x^4 – y^4$ *as* $(x^2)^2 – (y^2)^2$, *thus recognizing it as a difference of squares that can be factored as* $(x^2 – y^2)(x^2 + y^2)$.

Write expressions in equivalent forms to solve problems

3. Choose and produce an equivalent form of an expression to reveal and explain properties of the quantity represented by the expression.★
   a. Factor a quadratic expression to reveal the zeros of the function it defines.
   b. Complete the square in a quadratic expression to reveal the maximum or minimum value of the function it defines.
   c. Use the properties of exponents to transform expressions for exponential functions. *For example the expression* 1.15^t *can be rewritten as* $(1.15^{1/12})^{12t} \approx 1.012^{12t}$ *to reveal the approximate equivalent monthly interest rate if the annual rate is 15%.*
4. Derive the formula for the sum of a finite geometric series (when the common ratio is not 1), and use the formula to solve problems. *For example, calculate mortgage payments.*★

Arithmetic with Polynomials and Rational Expressions A-APR

Perform arithmetic operations on polynomials

1. Understand that polynomials form a system analogous to the integers, namely, they are closed under the operations of addition, subtraction, and multiplication; add, subtract, and multiply polynomials.

Understand the relationship between zeros and factors of polynomials

2. Know and apply the Remainder Theorem: For a polynomial $p(x)$ and a number a, the remainder on division by $x – a$ is $p(a)$, so $p(a) = 0$ if and only if $(x – a)$ is a factor of $p(x)$.
3. Identify zeros of polynomials when suitable factorizations are available, and use the zeros to construct a rough graph of the function defined by the polynomial.

Use polynomial identities to solve problems

4. Prove polynomial identities and use them to describe numerical relationships. *For example, the polynomial identity* $(x^2 + y^2)^2 = (x^2 – y^2)^2 + (2xy)^2$ *can be used to generate Pythagorean triples.*
5. (+) Know and apply the Binomial Theorem for the expansion of $(x + y)^n$ in powers of x and y for a positive integer n, where x and y are any numbers, with coefficients determined for example by Pascal's Triangle.[1]

[1] The Binomial Theorem can be proved by mathematical induction or by a com- binatorial argument.

Rewrite rational expressions

6. Rewrite simple rational expressions in different forms; write $a(x)/b(x)$ in the form $q(x) + r(x)/b(x)$, where $a(x)$, $b(x)$, $q(x)$, and $r(x)$ are polynomials with the degree of $r(x)$ less than the degree of $b(x)$, using inspection, long division, or, for the more complicated examples, a computer algebra system.
7. (+) Understand that rational expressions form a system analogous to the rational numbers, closed under addition, subtraction, multiplication, and division by a nonzero rational expression; add, subtract, multiply, and divide rational expressions.

Creating Equations★ A-CED

Create equations that describe numbers or relationships

1. Create equations and inequalities in one variable and use them to solve problems. *Include equations arising from linear and quadratic functions, and simple rational and exponential functions.*
2. Create equations in two or more variables to represent relationships between quantities; graph equations on coordinate axes with labels and scales.
3. Represent constraints by equations or inequalities, and by systems of equations and/or inequalities, and interpret solutions as viable or non- viable options in a modeling context. *For example, represent inequalities describing nutritional and cost constraints on combinations of different foods.*
4. Rearrange formulas to highlight a quantity of interest, using the same reasoning as in solving equations. *For example, rearrange Ohm's law V = IR to highlight resistance R.*

Reasoning with Equations and Inequalities A-REI

Understand solving equations as a process of reasoning and explain the reasoning

1. Explain each step in solving a simple equation as following from the equality of numbers asserted at the previous step, starting from the assumption that the original equation has a solution. Construct a viable argument to justify a solution method.
2. Solve simple rational and radical equations in one variable, and give examples showing how extraneous solutions may arise.

Solve equations and inequalities in one variable

3. Solve linear equations and inequalities in one variable, including equations with coefficients represented by letters.
4. Solve quadratic equations in one variable.
   a. Use the method of completing the square to transform any quadratic equation in x into an equation of the form $(x – p)^2 = q$ that has the same solutions. Derive the quadratic formula from this form.
   b. Solve quadratic equations by inspection (e.g., for $x^2 = 49$), taking square roots, completing the square, the quadratic formula and factoring, as appropriate to the initial form of the equation. Recognize when the quadratic formula gives complex solutions and write them as $a \pm bi$ for real numbers a and b.

Solve systems of equations

5. Prove that, given a system of two equations in two variables, replacing one equation by the sum of that equation and a multiple of the other produces a system with the same solutions.

6. Solve systems of linear equations exactly and approximately (e.g., with graphs), focusing on pairs of linear equations in two variables.
7. Solve a simple system consisting of a linear equation and a quadratic equation in two variables algebraically and graphically. *For example, find the points of intersection between the line* $y = -3x$ and the circle $x^2 + y^2 = 3$.
8. (+) Represent a system of linear equations as a single matrix equation in a vector variable.
9. (+) Find the inverse of a matrix if it exists and use it to solve systems of linear equations (using technology for matrices of dimension 3 × 3 or greater).

Represent and solve equations and inequalities graphically

10. Understand that the graph of an equation in two variables is the set of all its solutions plotted in the coordinate plane, often forming a curve (which could be a line).
11. Explain why the x-coordinates of the points where the graphs of the equations $y = f(x)$ and $y = g(x)$ intersect are the solutions of the equation $f(x) = g(x)$; find the solutions approximately, e.g., using technology to graph the functions, make tables of values, or find successive approximations. Include cases where $f(x)$ and/or $g(x)$ are linear, polynomial, rational, absolute value, exponential, and logarithmic functions.★
12. Graph the solutions to a linear inequality in two variables as a half- plane (excluding the boundary in the case of a strict inequality), and graph the solution set to a system of linear inequalities in two variables as the intersection of the corresponding half-planes.

Mathematics | High School - Functions

Functions describe situations where one quantity determines another. For example, the return on $10,000 invested at an annualized percentage rate of 4.25% is a function of the length of time the money is invested. Because we continually make theories about dependencies between quantities in nature and society, functions are important tools in the construction of mathematical models.

In school mathematics, functions usually have numerical inputs and outputs and are often defined by an algebraic expression. For example, the time in hours it takes for a car to drive 100 miles is a function of the car's speed in miles per hour, v; the rule $T(v) = 100/v$ expresses this relationship algebraically and defines a function whose name is T.

The set of inputs to a function is called its domain. We often infer the domain to be all inputs for which the expression defining a function has a value, or for which the function makes sense in a given context.

A function can be described in various ways, such as by a graph (e.g., the trace of a seismograph); by a verbal rule, as in, "I'll give you a state, you give me the capital city;" by an algebraic expression like $f(x) = a + bx$; or by a recursive rule. The graph of a function is often a useful way of visualizing the relationship of the function models, and manipulating a mathematical expression for a function can throw light on the function's properties.

Functions presented as expressions can model many important phenomena. Two important families of functions characterized by laws of growth are linear functions, which grow at a constant rate, and exponential functions, which grow at a constant percent rate. Linear functions with a constant term of zero describe proportional relationships.

A graphing utility or a computer algebra system can be used to experiment with properties of these functions and their graphs and to build computational models of functions, including recursively defined functions.

Connections to Expressions, Equations, Modeling, and Coordinates.

Determining an output value for a particular input involves evaluating an expression; finding inputs that yield a given output involves solving an equation. Questions about when two functions have the same value for the same input lead to equations, whose solutions can be visualized from the intersection of their graphs. Because functions describe relationships between quantities, they are frequently used in modeling. Sometimes functions are defined by a recursive process, which can be displayed effectively using a spreadsheet or other technology.

Functions Overview

Interpreting Functions

- Understand the concept of a function and use function notation
- Interpret functions that arise in applications in terms of the context
- Analyze functions using different representations

Building Functions

- Build a function that models a relationship between two quantities
- Build new functions from existing functions

Linear, Quadratic, and Exponential Models

- Construct and compare linear, quadratic, and exponential models and solve problems
- Interpret expressions for functions in terms of the situation they model

Trigonometric Functions

- Extend the domain of trigonometric functions using the unit circle
- Model periodic phenomena with trigonometric functions
- Prove and apply trigonometric identities

Mathematical Practices

1. Make sense of problems and persevere in solving them.
2. Reason abstractly and quantitatively.
3. Construct viable arguments and critique the reasoning of others.
4. Model with mathematics.
5. Use appropriate tools strategically.
6. Attend to precision.
7. Look for and make use of structure.
8. Look for and express regularity in repeated reasoning.

Interpreting Functions F-IF

Understand the concept of a function and use function notation

1. Understand that a function from one set (called the domain) to another set (called the range) assigns to each element of the domain exactly one element of the range. If *f* is a function and *x* is an element of its domain, then *f*(*x*) denotes the output of *f* corresponding to the input *x*. The graph of *f* is the graph of the equation *y* = *f*(*x*).

2. Use function notation, evaluate functions for inputs in their domains, and interpret statements that use function notation in terms of a context.

3. Recognize that sequences are functions, sometimes defined recursively, whose domain is a subset of the integers. *For example, the Fibonacci sequence is defined recursively by* $f(0) = f(1) = 1$, $f(n+1) = f(n) + f(n-1)$ *for* $n \geq 1$.

Interpret functions that arise in applications in terms of the context

4. For a function that models a relationship between two quantities, interpret key features of graphs and tables in terms of the quantities, and sketch graphs showing key features given a verbal description of the relationship. *Key features include: intercepts; intervals where the function is increasing, decreasing, positive, or negative; relative maximums and minimums; symmetries; end behavior; and periodicity.*★

5. Relate the domain of a function to its graph and, where applicable, to the quantitative relationship it describes. *For example, if the function h(n) gives the number of person-hours it takes to assemble n engines in a factory, then the positive integers would be an appropriate domain for the function.*★

6. Calculate and interpret the average rate of change of a function (presented symbolically or as a table) over a specified interval. Estimate the rate of change from a graph.★

Analyze functions using different representations

7. Graph functions expressed symbolically and show key features of the graph, by hand in simple cases and using technology for more complicated cases.★
   a. Graph linear and quadratic functions and show intercepts, maxima, and minima.
   b. Graph square root, cube root, and piecewise-defined functions, including step functions and absolute value functions.
   c. Graph polynomial functions, identifying zeros when suitable factorizations are available, and showing end behavior.
   d. (+) Graph rational functions, identifying zeros and asymptotes when suitable factorizations are available, and showing end behavior.
   e. Graph exponential and logarithmic functions, showing intercepts and end behavior, and trigonometric functions, showing period, midline, and amplitude.

8. Write a function defined by an expression in different but equivalent forms to reveal and explain different properties of the function.
   a. Use the process of factoring and completing the square in a quadratic function to show zeros, extreme values, and symmetry of the graph, and interpret these in terms of a context.
   b. Use the properties of exponents to interpret expressions for exponential functions. *For example, identify percent rate of change in functions such as* $y = (1.02)^t$, $y = (0.97)^t$, $y = (1.01)^{12t}$, $y = (1.2)^{t/10}$, *and classify them as representing exponential growth or decay.*

9. Compare properties of two functions each represented in a different way (algebraically, graphically, numerically in tables, or by verbal descriptions). *For example, given a graph of one quadratic function and an algebraic expression for another, say which has the larger maximum.*

Building Functions F-BF

Build a function that models a relationship between two quantities

1. Write a function that describes a relationship between two quantities.★
   a. Determine an explicit expression, a recursive process, or steps for calculation from a context.
   b. Combine standard function types using arithmetic operations. *For example, build a function that models the temperature of a cooling body by adding a constant function to a decaying exponential, and relate these functions to the model.*
   c. (+) Compose functions. *For example, if T(y) is the temperature in the atmosphere as a function of height, and h(t) is the height of a weather balloon as a function of time, then T(h(t)) is the temperature at the location of the weather balloon as a function of time.*
2. Write arithmetic and geometric sequences both recursively and with an explicit formula, use them to model situations, and translate between the two forms.★

Build new functions from existing functions

3. Identify the effect on the graph of replacing $f(x)$ by $f(x) + k$, $k\,f(x)$, $f(kx)$, and $f(x + k)$ for specific values of k (both positive and negative); find the value of k given the graphs. Experiment with cases and illustrate an explanation of the effects on the graph using technology. *Include recognizing even and odd functions from their graphs and algebraic expressions for them.*
4. Find inverse functions.
   a. Solve an equation of the form f(x) = c for a simple function f that has an inverse and write an expression for the inverse. *For example,* $f(x) = 2\,x^3$ *or* $f(x) = (x+1)/(x–1)$ *for* $x \neq 1$.
   b. (+) Verify by composition that one function is the inverse of another.
   c. (+) Read values of an inverse function from a graph or a table, given that the function has an inverse.
   d. (+) Produce an invertible function from a non-invertible function by restricting the domain.
5. (+) Understand the inverse relationship between exponents and logarithms and use this relationship to solve problems involving logarithms and exponents.

Linear, Quadratic, and Exponential Models★ F-LE

Construct and compare linear, quadratic, and exponential models and solve problems

1. Distinguish between situations that can be modeled with linear functions and with exponential functions.
   a. Prove that linear functions grow by equal differences over equal intervals, and that exponential functions grow by equal factors over equal intervals.
   b. Recognize situations in which one quantity changes at a constant rate per unit interval relative to another.
   c. Recognize situations in which a quantity grows or decays by a constant percent rate per unit interval relative to another.

2. Construct linear and exponential functions, including arithmetic and geometric sequences, given a graph, a description of a relationship, or two input-output pairs (include reading these from a table).
3. Observe using graphs and tables that a quantity increasing exponentially eventually exceeds a quantity increasing linearly, quadratically, or (more generally) as a polynomial function.
4. For exponential models, express as a logarithm the solution to $ab^{ct} = d$ where a, c, and d are numbers and the base b is 2, 10, or e; evaluate the logarithm using technology.

Interpret expressions for functions in terms of the situation they model

5. Interpret the parameters in a linear or exponential function in terms of a context.

Trigonometric Functions — F-TF

Extend the domain of trigonometric functions using the unit circle

1. Understand radian measure of an angle as the length of the arc on the unit circle subtended by the angle.
2. Explain how the unit circle in the coordinate plane enables the extension of trigonometric functions to all real numbers, interpreted as radian measures of angles traversed counterclockwise around the unit circle.
3. (+) Use special triangles to determine geometrically the values of sine, cosine, tangent for $\pi/3$, $\pi/4$ and $\pi/6$, and use the unit circle to express the values of sine, cosine, and tangent for $\pi - x$, $\pi + x$, and $2\pi - x$ in terms of their values for x, where x is any real number.
4. (+) Use the unit circle to explain symmetry (odd and even) and periodicity of trigonometric functions.

Model periodic phenomena with trigonometric functions

5. Choose trigonometric functions to model periodic phenomena with specified amplitude, frequency, and midline.★
6. (+) Understand that restricting a trigonometric function to a domain on which it is always increasing or always decreasing allows its inverse to be constructed.
7. (+) Use inverse functions to solve trigonometric equations that arise in modeling contexts; evaluate the solutions using technology, and interpret them in terms of the context.★

Prove and apply trigonometric identities

8. Prove the Pythagorean identity $\sin^2(\theta) + \cos^2(\theta) = 1$ and use it to find $\sin(\theta)$, $\cos(\theta)$, or $\tan(\theta)$ given $\sin(\theta)$, $\cos(\theta)$, or $\tan(\theta)$ and the quadrant of the angle.
9. (+) Prove the addition and subtraction formulas for sine, cosine, and tangent and use them to solve problems.

Mathematics | High School - Modeling

Modeling links classroom mathematics and statistics to everyday life, work, and decision-making. Modeling is the process of choosing and using appropriate mathematics and statistics to analyze empirical situations, to understand them better, and to improve decisions. Quantities and their relationships in physical, economic, public policy, social, and everyday situations can be modeled using mathematical and statistical methods. When making mathematical models, technology is valuable for varying assumptions, exploring consequences, and comparing predictions with data.

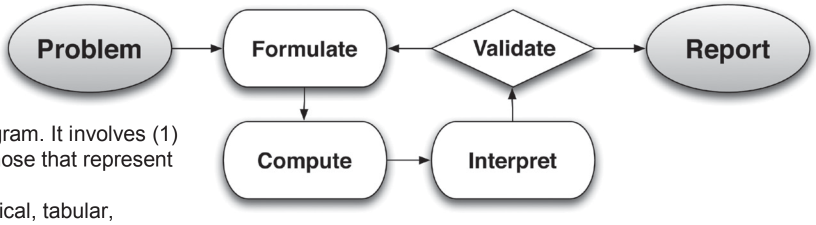
A model can be very simple, such as writing total cost as a product of unit price and number bought, or using a geometric shape to describe a physical object like a coin. Even such simple models involve making choices. It is up to us whether to model a coin as a three-dimensional cylinder, or whether a two-dimensional disk works well enough for our purposes. Other situations—modeling a delivery route, a production schedule, or a comparison of loan amortizations—need more elaborate models that use other tools from the mathematical sciences. Real-world situations are not organized and labeled for analysis; formulating tractable models, representing such models, and analyzing them is appropriately a creative process. Like every such process, this depends on acquired expertise as well as creativity.

Some examples of such situations might include:

- Estimating how much water and food is needed for emergency relief in a devastated city of 3 million people, and how it might be distributed.
- Planning a table tennis tournament for 7 players at a club with 4 tables, where each player plays against each other player.
- Designing the layout of the stalls in a school fair so as to raise as much money as possible.
- Analyzing stopping distance for a car.
- Modeling savings account balance, bacterial colony growth, or investment growth.
- Engaging in critical path analysis, e.g., applied to turnaround of an aircraft at an airport.
- Analyzing risk in situations such as extreme sports, pandemics, and terrorism.
- Relating population statistics to individual predictions.

In situations like these, the models devised depend on a number of factors: How precise an answer do we want or need? What aspects of the situation do we most need to understand, control, or optimize? What resources of time and tools do we have? The range of models that we can create and analyze is also constrained by the limitations of our mathematical, statistical, and technical skills, and our ability to recognize significant variables and relationships among them. Diagrams of various kinds, spreadsheets and other technology, and algebra are powerful tools for understanding and solving problems drawn from different types of real-world situations.

One of the insights provided by mathematical modeling is that essentially the same mathematical or statistical structure can sometimes model seemingly different situations. Models can also shed light on the mathematical structures themselves, for example, as when a model of bacterial growth makes more vivid the explosive growth of the exponential function.



The basic modeling cycle is summarized in the diagram. It involves (1) identifying variables in the situation and selecting those that represent essential features, (2) formulating a model by creating and selecting geometric, graphical, tabular, algebraic, or statistical representations that describe relationships between the variables, (3) analyzing and performing operations on these relationships to draw conclusions, (4) interpreting the results of the mathematics in terms of the original situation, (5) validating the conclusions by comparing them with the situation, and then either improving the model or, if it is acceptable, (6) reporting on the conclusions and the reasoning behind them. Choices, assumptions, and approximations are present throughout this cycle.

In descriptive modeling, a model simply describes the phenomena or summarizes them in a compact form. Graphs of observations are a familiar descriptive model – for example, graphs of global temperature and atmospheric CO_2 over time.

Analytic modeling seeks to explain data on the basis of deeper theoretical ideas, albeit with parameters that are empirically based; for example, exponential growth of bacterial colonies (until cut-off mechanisms such as pollution or starvation intervene) follows from a constant reproduction rate. Functions are an important tool for analyzing such problems.

Graphing utilities, spreadsheets, computer algebra systems, and dynamic geometry software are powerful tools that can be used to model purely mathematical phenomena (e.g., the behavior of polynomials) as well as physical phenomena.

Modeling Standards *Modeling is best interpreted not as a collection of isolated topics but rather in relation to other standards. Making mathematical models is a Standard for Mathematical Practice, and specific modeling standards appear throughout the high school standards indicated by a star symbol* (★).

Mathematics | High School - Geometry

An understanding of the attributes and relationships of geometric objects can be applied in diverse contexts—interpreting a schematic drawing, estimating the amount of wood needed to frame a sloping roof, rendering computer graphics, or designing a sewing pattern for the most efficient use of material.

Although there are many types of geometry, school mathematics is devoted primarily to plane Euclidean geometry, studied both synthetically (without coordinates) and analytically (with coordinates). Euclidean geometry is characterized most importantly by the Parallel Postulate that through a point not on a given line there is exactly one parallel line. (Spherical geometry, in contrast, has no parallel lines.)

During high school, students begin to formalize their geometry experiences from elementary and middle school, using more precise definitions and developing careful proofs. Later in college some students develop Euclidean and other geometries carefully from a small set of axioms.

The concepts of congruence, similarity, and symmetry can be understood from the perspective of geometric transformation. Fundamental are the rigid motions: translations, rotations, reflections, and combinations of these, all of which are here assumed to preserve distance and angles (and therefore shapes generally). Reflections and rotations each explain a particular type of symmetry, and the symmetries of an object offer insight into its attributes—as when the reflective symmetry of an isosceles triangle assures that its base angles are congruent.

In the approach taken here, two geometric figures are defined to be congruent if there is a sequence of rigid motions that carries one onto the other. This is the principle of superposition. For triangles, congruence means the equality of all corresponding pairs of sides and all corresponding pairs of angles. During the middle grades, through experiences drawing triangles from given conditions, students notice ways to specify enough measures in a triangle to ensure that all triangles drawn with those measures are congruent. Once these triangle congruence criteria (ASA, SAS, and SSS) are established using rigid motions, they can be used to prove theorems about triangles, quadrilaterals, and other geometric figures.

Similarity transformations (rigid motions followed by dilations) define similarity in the same way that rigid motions define congruence, thereby formalizing the similarity ideas of "same shape" and "scale factor" developed in the middle grades. These transformations lead to the criterion for triangle similarity that two pairs of corresponding angles are congruent.

The definitions of sine, cosine, and tangent for acute angles are founded on right triangles and similarity, and, with the Pythagorean Theorem, are fundamental in many real-world and theoretical situations. The Pythagorean Theorem is generalized to non- right triangles by the Law of Cosines. Together, the Laws of Sines and Cosines embody the triangle congruence criteria for the cases where three pieces of information suffice to completely solve a triangle. Furthermore, these laws yield two possible solutions in the ambiguous case, illustrating that Side-Side-Angle is not a congruence criterion.

Analytic geometry connects algebra and geometry, resulting in powerful methods of analysis and problem solving. Just as the number line associates numbers with locations in one dimension, a pair of perpendicular axes associates pairs of numbers with locations in two dimensions. This correspondence between numerical coordinates and geometric points allows methods from algebra to be applied to geometry and vice versa. The solution set of an equation becomes a geometric curve, making visualization a tool for doing and understanding algebra. Geometric shapes can be described by equations, making algebraic manipulation into a tool for geometric understanding, modeling, and proof. Geometric transformations of the graphs of equations correspond to algebraic changes in their equations.

Dynamic geometry environments provide students with experimental and modeling tools that allow them to investigate geometric phenomena in much the same way as computer algebra systems allow them to experiment with algebraic phenomena.

Connections to Equations. The correspondence between numerical coordinates and geometric points allows methods from algebra to be applied to geometry and vice versa. The solution set of an equation becomes a geometric curve, making visualization a tool for doing and understanding algebra. Geometric shapes can be described by equations, making algebraic manipulation into a tool for geometric understanding, modeling, and proof.

Geometry Overview

Congruence

- Experiment with transformations in the plane
- Understand congruence in terms of rigid motions
- Prove geometric theorems
- Make geometric constructions

Similarity, Right Triangles, and Trigonometry

- Understand similarity in terms of similarity transformations
- Prove theorems involving similarity
- Define trigonometric ratios and solve problems involving right triangles
- Apply trigonometry to general triangles

Circles

- Understand and apply theorems about circles
- Find arc lengths and areas of sectors of circles

Expressing Geometric Properties with Equations

- Translate between the geometric description and the equation for a conic section
- Use coordinates to prove simple geometric theorems algebraically

Geometric Measurement and Dimension

- Explain volume formulas and use them to solve problems
- Visualize relationships between two-dimensional and three-dimensional objects

Modeling with Geometry

- apply geometric concepts in modeling situations

Mathematical Practices

1. Make sense of problems and persevere in solving them.
2. Reason abstractly and quantitatively.
3. Construct viable arguments and critique the reasoning of others.
4. Model with mathematics.
5. Use appropriate tools strategically.
6. Attend to precision.
7. Look for and make use of structure.
8. Look for and express regularity in repeated reasoning.

Congruence G-CO

Experiment with transformations in the plane

1. Know precise definitions of angle, circle, perpendicular line, parallel line, and line segment, based on the undefined notions of point, line, distance along a line, and distance around a circular arc.
2. Represent transformations in the plane using, e.g., transparencies and geometry software; describe transformations as functions that take points in the plane as inputs and give other points as outputs. Compare transformations that preserve distance and angle to those that do not (e.g., translation versus horizontal stretch).
3. Given a rectangle, parallelogram, trapezoid, or regular polygon, describe the rotations and reflections that carry it onto itself.
4. Develop definitions of rotations, reflections, and translations in terms of angles, circles, perpendicular lines, parallel lines, and line segments.
5. Given a geometric figure and a rotation, reflection, or translation, draw the transformed figure using, e.g., graph paper, tracing paper, or geometry software. Specify a sequence of transformations that will carry a given figure onto another.

Understand congruence in terms of rigid motions

6. Use geometric descriptions of rigid motions to transform figures and to predict the effect of a given rigid motion on a given figure; given two figures, use the definition of congruence in terms of rigid motions to decide if they are congruent.
7. Use the definition of congruence in terms of rigid motions to show that two triangles are congruent if and only if corresponding pairs of sides and corresponding pairs of angles are congruent.
8. Explain how the criteria for triangle congruence (ASA, SAS, and SSS) follow from the definition of congruence in terms of rigid motions.

Prove geometric theorems

9. Prove theorems about lines and angles. *Theorems include: vertical angles are congruent; when a transversal crosses parallel lines, alternate interior angles are congruent and corresponding angles are congruent; points on a perpendicular bisector of a line segment are exactly those equidistant from the segment's endpoints.*
10. Prove theorems about triangles. *Theorems include: measures of interior angles of a triangle sum to 180°; base angles of isosceles triangles are congruent; the segment joining midpoints of two sides of a triangle is parallel to the third side and half the length; the medians of a triangle meet at a point.*
11. Prove theorems about parallelograms. *Theorems include: opposite sides are congruent, opposite angles are congruent, the diagonals of a parallelogram bisect each other, and conversely, rectangles are parallelograms with congruent diagonals.*

Make geometric constructions

12. Make formal geometric constructions with a variety of tools and methods (compass and straightedge, string, reflective devices, paper folding, dynamic geometric software, etc.). *Copying a segment; copying an angle; bisecting a segment; bisecting an angle; constructing perpendicular lines, including the perpendicular bisector of a line segment; and constructing a line parallel to a given line through a point not on the line.*
13. Construct an equilateral triangle, a square, and a regular hexagon inscribed in a circle.

Similarity, Right Triangles, and Trigonometry G-SRT

Understand similarity in terms of similarity transformations

1. Verify experimentally the properties of dilations given by a center and a scale factor:
   a. A dilation takes a line not passing through the center of the dilation to a parallel line, and leaves a line passing through the center unchanged.
   b. The dilation of a line segment is longer or shorter in the ratio given by the scale factor.
2. Given two figures, use the definition of similarity in terms of similarity transformations to decide if they are similar; explain using similarity transformations the meaning of similarity for triangles as the equality of all corresponding pairs of angles and the proportionality of all corresponding pairs of sides.
3. Use the properties of similarity transformations to establish the AA criterion for two triangles to be similar.

Prove theorems involving similarity

4. Prove theorems about triangles. *Theorems include: a line parallel to one side of a triangle divides the other two proportionally, and conversely; the Pythagorean Theorem proved using triangle similarity.*
5. Use congruence and similarity criteria for triangles to solve problems and to prove relationships in geometric figures.

Define trigonometric ratios and solve problems involving right triangles

6. Understand that by similarity, side ratios in right triangles are properties of the angles in the triangle, leading to definitions of trigonometric ratios for acute angles.
7. Explain and use the relationship between the sine and cosine of complementary angles.
8. Use trigonometric ratios and the Pythagorean Theorem to solve right triangles in applied problems.★

Apply trigonometry to general triangles

9. (+) Derive the formula $A = 1/2\ ab \sin(C)$ for the area of a triangle by drawing an auxiliary line from a vertex perpendicular to the opposite side.
10. (+) Prove the Laws of Sines and Cosines and use them to solve problems.
11. (+) Understand and apply the Law of Sines and the Law of Cosines to find unknown measurements in right and non-right triangles (e.g., surveying problems, resultant forces).

Circles G-C

Understand and apply theorems about circles

1. Prove that all circles are similar.
2. Identify and describe relationships among inscribed angles, radii, and chords. *Include the relationship between central, inscribed, and circumscribed angles; inscribed angles on a diameter are right angles; the radius of a circle is perpendicular to the tangent where the radius intersects the circle.*
3. Construct the inscribed and circumscribed circles of a triangle, and prove properties of angles for a quadrilateral inscribed in a circle.
4. (+) Construct a tangent line from a point outside a given circle to the circle.

Find arc lengths and areas of sectors of circles

5. Derive using similarity the fact that the length of the arc intercepted by an angle is proportional to the radius, and define the radian measure of the angle as the constant of proportionality; derive the formula for the area of a sector.

Expressing Geometric Properties with Equations	G-GPE

Translate between the geometric description and the equation for a conic section

1. Derive the equation of a circle of given center and radius using the Pythagorean Theorem; complete the square to find the center and radius of a circle given by an equation.
2. Derive the equation of a parabola given a focus and directrix.
3. (+) Derive the equations of ellipses and hyperbolas given the foci, using the fact that the sum or difference of distances from the foci is constant.

Use coordinates to prove simple geometric theorems algebraically

4. Use coordinates to prove simple geometric theorems algebraically. *For example, prove or disprove that a figure defined by four given points in the coordinate plane is a rectangle; prove or disprove that the point (1, $\sqrt{3}$) lies on the circle centered at the origin and containing the point (0, 2).*
5. Prove the slope criteria for parallel and perpendicular lines and use them to solve geometric problems (e.g., find the equation of a line parallel or perpendicular to a given line that passes through a given point).
6. Find the point on a directed line segment between two given points that partitions the segment in a given ratio.
7. Use coordinates to compute perimeters of polygons and areas of triangles and rectangles, e.g., using the distance formula.★

Geometric Measurement and Dimension	G-GMD

Explain volume formulas and use them to solve problems

1. Give an informal argument for the formulas for the circumference of a circle, area of a circle, volume of a cylinder, pyramid, and cone. *Use dissection arguments, Cavalieri's principle, and informal limit arguments.*
2. (+) Give an informal argument using Cavalieri's principle for the formulas for the volume of a sphere and other solid figures.
3. Use volume formulas for cylinders, pyramids, cones, and spheres to solve problems.★

Visualize relationships between two-dimensional and three- dimensional objects

4. Identify the shapes of two-dimensional cross-sections of three- dimensional objects, and identify three-dimensional objects generated by rotations of two-dimensional objects.

Modeling with Geometry	G-MG

Apply geometric concepts in modeling situations

1. Use geometric shapes, their measures, and their properties to describe objects (e.g., modeling a tree trunk or a human torso as a cylinder).★
2. Apply concepts of density based on area and volume in modeling situations (e.g., persons per square mile, BTUs per cubic foot).★
3. Apply geometric methods to solve design problems (e.g., designing an object or structure to satisfy physical constraints or minimize cost; working with typographic grid systems based on ratios).★

Mathematics | High School - Statistics and Probability★

Decisions or predictions are often based on data—numbers in context. These decisions or predictions would be easy if the data always sent a clear message, but the message is often obscured by variability. Statistics provides tools for describing variability in data and for making informed decisions that take it into account.

Data are gathered, displayed, summarized, examined, and interpreted to discover patterns and deviations from patterns. Quantitative data can be described in terms of key characteristics: measures of shape, center, and spread. The shape of a data distribution might be described as symmetric, skewed, flat, or bell shaped, and it might be summarized by a statistic measuring center (such as mean or median) and a statistic measuring spread (such as standard deviation or interquartile range). Different distributions can be compared numerically using these statistics or compared visually using plots. Knowledge of center and spread are not enough to describe a distribution. Which statistics to compare, which plots to use, and what the results of a comparison might mean, depend on the question to be investigated and the real-life actions to be taken.

Randomization has two important uses in drawing statistical conclusions. First, collecting data from a random sample of a population makes it possible to draw valid conclusions about the whole population, taking variability into account. Second, randomly assigning individuals to different treatments allows a fair comparison of the effectiveness of those treatments. A statistically significant outcome is one that is unlikely to be due to chance alone, and this can be evaluated only under the condition of randomness. The conditions under which data are collected are important in drawing conclusions from the data; in critically reviewing uses of statistics in public media and other reports, it is important to consider the study design, how the data were gathered, and the analyses employed as well as the data summaries and the conclusions drawn.

Random processes can be described mathematically by using a probability model: a list or description of the possible outcomes (the sample space), each of which is assigned a probability. In situations such as flipping a coin, rolling a number cube, or drawing a card, it might be reasonable to assume various outcomes are equally likely. In a probability model, sample points represent outcomes and combine to make up events; probabilities of events can be computed by applying the Addition and Multiplication Rules. Interpreting these probabilities relies on an understanding of independence and conditional probability, which can be approached through the analysis of two-way tables.

Technology plays an important role in statistics and probability by making it possible to generate plots, regression functions, and correlation coefficients, and to simulate many possible outcomes in a short amount of time.

Connections to Functions and Modeling. Functions may be used to describe data; if the data suggest a linear relationship, the relationship can be modeled with a regression line, and its strength and direction can be expressed through a correlation coefficient.

Statistics and Probability Overview

Interpreting Categorical and Quantitative Data

- Summarize, represent, and interpret data on a single count or measurement variable
- Summarize, represent, and interpret data on two categorical and quantitative variables
- Interpret linear models

Making Inferences and Justifying Conclusions

- Understand and evaluate random processes underlying statistical experiments
- Make inferences and justify conclusions from sample surveys, experiments and observational studies

Conditional Probability and the Rules of Probability

- Understand independence and conditional probability and use them to interpret data
- Use the rules of probability to compute probabilities of compound events in a uniform probability model

Using Probability to Make Decisions

- Calculate expected values and use them to solve problems
- Use probability to evaluate outcomes of decisions

Mathematical Practices

1. Make sense of problems and persevere in solving them.
2. Reason abstractly and quantitatively.
3. Construct viable arguments and critique the reasoning of others.
4. Model with mathematics.
5. Use appropriate tools strategically.
6. Attend to precision.
7. Look for and make use of structure.
8. Look for and express regularity in repeated reasoning.

Interpreting Categorical and Quantitative Data S-ID

Summarize, represent, and interpret data on a single count or measurement variable

1. Represent data with plots on the real number line (dot plots, histograms, and box plots).
2. Use statistics appropriate to the shape of the data distribution to compare center (median, mean) and spread (interquartile range, standard deviation) of two or more different data sets.
3. Interpret differences in shape, center, and spread in the context of the data sets, accounting for possible effects of extreme data points (outliers).
4. Use the mean and standard deviation of a data set to fit it to a normal distribution and to estimate population percentages. Recognize that there are data sets for which such a procedure is not appropriate. Use calculators, spreadsheets, and tables to estimate areas under the normal curve.

Summarize, represent, and interpret data on two categorical and quantitative variables

5. Summarize categorical data for two categories in two-way frequency tables. Interpret relative frequencies in the context of the data (including joint, marginal, and conditional relative frequencies). Recognize possible associations and trends in the data.
6. Represent data on two quantitative variables on a scatter plot, and describe how the variables are related.
   a. Fit a function to the data; use functions fitted to data to solve problems in the context of the data. *Use given functions or choose a function suggested by the context. Emphasize linear, quadratic, and exponential models.*
   b. Informally assess the fit of a function by plotting and analyzing residuals.
   c. Fit a linear function for a scatter plot that suggests a linear association.

Interpret linear models

7. Interpret the slope (rate of change) and the intercept (constant term) of a linear model in the context of the data.
8. Compute (using technology) and interpret the correlation coefficient of a linear fit.
9. Distinguish between correlation and causation.

Making Inferences and Justifying Conclusions S-IC

Understand and evaluate random processes underlying statistical experiments

1. Understand statistics as a process for making inferences about population parameters based on a random sample from that population.
2. Decide if a specified model is consistent with results from a given data-generating process, e.g., using simulation. *For example, a model says a spinning coin falls heads up with probability 0.5. Would a result of 5 tails in a row cause you to question the model?*

Make inferences and justify conclusions from sample surveys, experiments, and observational studies

3. Recognize the purposes of and differences among sample surveys, experiments, and observational studies; explain how randomization relates to each.

4. Use data from a sample survey to estimate a population mean or proportion; develop a margin of error through the use of simulation models for random sampling.
5. Use data from a randomized experiment to compare two treatments; use simulations to decide if differences between parameters are significant.
6. Evaluate reports based on data.

Conditional Probability and the Rules of Probability S-CP

Understand independence and conditional probability and use them to interpret data

1. Describe events as subsets of a sample space (the set of outcomes) using characteristics (or categories) of the outcomes, or as unions, intersections, or complements of other events ("or," "and," "not").
2. Understand that two events *A* and *B* are independent if the probability of *A* and *B* occurring together is the product of their probabilities, and use this characterization to determine if they are independent.
3. Understand the conditional probability of *A* given *B* as *P*(*A* and *B*)/*P*(*B*), and interpret independence of *A* and *B* as saying that the conditional probability of *A* given *B* is the same as the probability of *A*, and the conditional probability of *B* given *A* is the same as the probability of *B*.
4. Construct and interpret two-way frequency tables of data when two categories are associated with each object being classified. Use the two-way table as a sample space to decide if events are independent and to approximate conditional probabilities. *For example, collect data from a random sample of students in your school on their favorite subject among math, science, and English. Estimate the probability that a randomly selected student from your school will favor science given that the student is in tenth grade. Do the same for other subjects and compare the results.*
5. Recognize and explain the concepts of conditional probability and independence in everyday language and everyday situations. *For example, compare the chance of having lung cancer if you are a smoker with the chance of being a smoker if you have lung cancer.*

Use the rules of probability to compute probabilities of compound events in a uniform probability model

6. Find the conditional probability of *A* given *B* as the fraction of *B*'s outcomes that also belong to *A,* and interpret the answer in terms of the model.
7. Apply the Addition Rule, P(A or B) = P(A) + P(B) – P(A and B), and interpret the answer in terms of the model.
8. (+) Apply the general Multiplication Rule in a uniform probability model, P(A and B) = P(A)P(B|A) = P(B)P(A|B), and interpret the answer in terms of the model.
9. (+) Use permutations and combinations to compute probabilities of compound events and solve problems.

Using Probability to Make Decisions S-MD

Calculate expected values and use them to solve problems

1. (+) Define a random variable for a quantity of interest by assigning a numerical value to each event in a sample space; graph the corresponding probability distribution using the same graphical displays as for data distributions.
2. (+) Calculate the expected value of a random variable; interpret it as the mean of the probability distribution.

3. (+) Develop a probability distribution for a random variable defined for a sample space in which theoretical probabilities can be calculated; find the expected value. *For example, find the theoretical probability distribution for the number of correct answers obtained by guessing on all five questions of a multiple-choice test where each question has four choices, and find the expected grade under various grading schemes.*

4. (+) Develop a probability distribution for a random variable defined for a sample space in which probabilities are assigned empirically; find the expected value. *For example, find a current data distribution on the number of TV sets per household in the United States, and calculate the expected number of sets per household. How many TV sets would you expect to find in 100 randomly selected households?*

Use probability to evaluate outcomes of decisions

5. (+) Weigh the possible outcomes of a decision by assigning probabilities to payoff values and finding expected values.
    a. Find the expected payoff for a game of chance. *For example, find the expected winnings from a state lottery ticket or a game at a fast- food restaurant.*
    b. Evaluate and compare strategies on the basis of expected values. *For example, compare a high-deductible versus a low-deductible automobile insurance policy using various, but reasonable, chances of having a minor or a major accident.*

6. (+) Use probabilities to make fair decisions (e.g., drawing by lots, using a random number generator).

7. (+) Analyze decisions and strategies using probability concepts (e.g., product testing, medical testing, pulling a hockey goalie at the end of a game).

Note on Courses and Transitions

The high school portion of the Standards for Mathematical Content specifies the mathematics all students should study for college and career readiness. These standards do not mandate the sequence of high school courses. However, the organization of high school courses is a critical component to implementation of the standards. To that end, sample high school pathways for mathematics – in both a traditional course sequence (Algebra I, Geometry, and Algebra II) as well as an integrated course sequence (Mathematics 1, Mathematics 2, Mathematics 3) – will be made available shortly after the release of the final Common Core State Standards. It is expected that additional model pathways based on these standards will become available as well.

The standards themselves do not dictate curriculum, pedagogy, or delivery of content. In particular, states may handle the transition to high school in different ways. For example, many students in the U.S. today take Algebra I in the 8th grade, and in some states this is a requirement. The K-7 standards contain the prerequisites to prepare students for Algebra I by 8th grade, and the standards are designed to permit states to continue existing policies concerning Algebra I in 8th grade.

A second major transition is the transition from high school to post-secondary education for college and careers. The evidence concerning college and career readiness shows clearly that the knowledge, skills, and practices important for readiness include a great deal of mathematics prior to the boundary defined by (+) symbols in these standards. Indeed, some of the highest priority content for college and career readiness comes from Grades 6-8. This body of material includes powerfully useful proficiencies such as applying ratio reasoning in real-world and mathematical problems, computing fluently with positive and negative fractions and decimals, and solving real-world and mathematical problems involving angle measure, area, surface area, and volume. Because important standards for college and career readiness are distributed across grades and courses, systems for evaluating college and career readiness should reach as far back in the standards as Grades 6-8. It is important to note as well that cut scores or other information generated by assessment systems for college and career readiness should be developed in collaboration with representatives from higher education and workforce development programs, and should be validated by subsequent performance of students in college and the workforce.

Glossary

Addition and subtraction within 5, 10, 20, 100, or 1000. Addition or subtraction of two whole numbers with whole number answers, and with sum or minuend in the range 0-5, 0-10, 0-20, or 0-100, respectively. Example: 8 + 2 = 10 is an addition within 10, 14 – 5 = 9 is a subtraction within 20, and 55 – 18 = 37 is a subtraction within 100.

Additive inverses. Two numbers whose sum is 0 are additive inverses of one another. Example: $^{3}/4$ and – $^{3}/4$ are additive inverses of one another because $^{3}/4$ + (– $^{3}/4$) = (– $^{3}/4$) + $^{3}/4$ = 0.

Associative property of addition. See Table 3 in this Glossary.

Associative property of multiplication. See Table 3 in this Glossary.

Bivariate data. Pairs of linked numerical observations. Example: a list of heights and weights for each player on a football team.

Box plot. A method of visually displaying a distribution of data values by using the median, quartiles, and extremes of the data set. A box shows the middle 50% of the data.[1]

Commutative property. See Table 3 in this Glossary.

Complex fraction. A fraction $^{A}/B$ where *A* and/or *B* are fractions (*B* nonzero).

Computation algorithm. A set of predefined steps applicable to a class of problems that gives the correct result in every case when the steps are carried out correctly. *See also:* computation strategy.

Computation strategy. Purposeful manipulations that may be chosen for specific problems, may not have a fixed order, and may be aimed at converting one problem into another. *See also:* computation algorithm.

Congruent. Two plane or solid figures are congruent if one can be obtained from the other by rigid motion (a sequence of rotations, reflections, and translations).

Counting on. A strategy for finding the number of objects in a group without having to count every member of the group. For example, if a stack of books is known to have 8 books and 3 more books are added to the top, it is not necessary to count the stack all over again. One can find the total by *counting on*—pointing to the top book and saying "eight," following this with "nine, ten, eleven. There are eleven books now."

Dot plot. *See:* line plot.

Dilation. A transformation that moves each point along the ray through the point emanating from a fixed center, and multiplies distances from the center by a common scale factor.

Expanded form. A multi-digit number is expressed in expanded form when it is written as a sum of single-digit multiples of powers of ten. For example, 643 = 600 + 40 + 3.

Expected value. For a random variable, the weighted average of its possible values, with weights given by their respective probabilities.

First quartile. For a data set with median *M*, the first quartile is the median of the data values less than *M*. Example: For the data set {1, 3, 6, 7, 10, 12, 14, 15, 22, 120}, the first quartile is 6.[2] *See also:* median, third quartile, interquartile range.

Fraction. A number expressible in the form $^{a}/b$ where *a* is a whole number and *b* is a positive whole number. (The word *fraction* in these standards always refers to a non-negative number.) *See also:* rational number.

Identity property of 0. See Table 3 in this Glossary.

Independently combined probability models. Two probability models are said to be combined independently if the probability of each ordered pair in the combined model equals the product of the original probabilities of the two individual outcomes in the ordered pair.

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[1]Adapted from Wisconsin Department of Public Instruction, http://dpi.wi.gov/standards/mathglos.html, accessed March 2, 2010.
[2]Many different methods for computing quartiles are in use. The method defined here is sometimes called the Moore and McCabe method. See Langford, E., "Quartiles in Elementary Statistics," *Journal of Statistics Education* Volume 14, Number 3 (2006).

Integer. A number expressible in the form *a* or –*a* for some whole number *a*.

Interquartile Range. A measure of variation in a set of numerical data, the interquartile range is the distance between the first and third quartiles of the data set. Example: For the data set {1, 3, 6, 7, 10, 12, 14, 15, 22, 120}, the interquartile range is 15 – 6 = 9. *See also:* first quartile, third quartile.

Line plot. A method of visually displaying a distribution of data values where each data value is shown as a dot or mark above a number line. Also known as a dot plot.[3]

Mean. A measure of center in a set of numerical data, computed by adding the values in a list and then dividing by the number of values in the list.[4] Example: For the data set {1, 3, 6, 7, 10, 12, 14, 15, 22, 120}, the mean is 21.

Mean absolute deviation. A measure of variation in a set of numerical data, computed by adding the distances between each data value and the mean, then dividing by the number of data values. Example: For the data set {2, 3, 6, 7, 10, 12, 14, 15, 22, 120}, the mean absolute deviation is 20.

Median. A measure of center in a set of numerical data. The median of a list of values is the value appearing at the center of a sorted version of the list—or the mean of the two central values, if the list contains an even number of values. Example: For the data set {2, 3, 6, 7, 10, 12, 14, 15, 22, 90}, the median is 11.

Midline. In the graph of a trigonometric function, the horizontal line halfway between its maximum and minimum values.

Multiplication and division within 100. Multiplication or division of two whole numbers with whole number answers, and with product or dividend in the range 0-100. Example: 72 ÷ 8 = 9.

Multiplicative inverses. Two numbers whose product is 1 are multiplicative inverses of one another. Example: 3/4 and 4/3 are multiplicative inverses of one another because 3/4 × 4/3 = 4/3 × 3/4 = 1.

Number line diagram. A diagram of the number line used to represent numbers and support reasoning about them. In a number line diagram for measurement quantities, the interval from 0 to 1 on the diagram represents the unit of measure for the quantity.

Percent rate of change. A rate of change expressed as a percent. Example: if a population grows from 50 to 55 in a year, it grows by 5/50 = 10% per year.

Probability distribution. The set of possible values of a random variable with a probability assigned to each.

Properties of operations. See Table 3 in this Glossary.

Properties of equality. See Table 4 in this Glossary.

Properties of inequality. See Table 5 in this Glossary.

Properties of operations. See Table 3 in this Glossary.

Probability. A number between 0 and 1 used to quantify likelihood for processes that have uncertain outcomes (such as tossing a coin, selecting a person at random from a group of people, tossing a ball at a target, or testing for a medical condition).

Probability model. A probability model is used to assign probabilities to outcomes of a chance process by examining the nature of the process. The set of all outcomes is called the sample space, and their probabilities sum to 1. *See also:* uniform probability model.

Random variable. An assignment of a numerical value to each outcome in a sample space.

Rational expression. A quotient of two polynomials with a non-zero denominator.

Rational number. A number expressible in the form a/b or – a/b for some fraction a/b. The rational numbers include the integers.

Rectilinear figure. A polygon all angles of which are right angles.

Rigid motion. A transformation of points in space consisting of a sequence of

[3]Adapted from Wisconsin Department of Public Instruction, *op. cit*.
[4]To be more precise, this defines the *arithmetic mean*.

one or more translations, reflections, and/or rotations. Rigid motions are here assumed to preserve distances and angle measures.

Repeating decimal. The decimal form of a rational number. *See also:* terminating decimal.

Sample space. In a probability model for a random process, a list of the individual outcomes that are to be considered.

Scatter plot. A graph in the coordinate plane representing a set of bivariate data. For example, the heights and weights of a group of people could be displayed on a scatter plot.[5]

Similarity transformation. A rigid motion followed by a dilation.

Tape diagram. A drawing that looks like a segment of tape, used to illustrate number relationships. Also known as a strip diagram, bar model, fraction strip, or length model.

Terminating decimal. A decimal is called terminating if its repeating digit is 0.

Third quartile. For a data set with median *M*, the third quartile is the median of the data values greater than *M*. Example: For the data set {2, 3, 6, 7, 10, 12, 14, 15, 22, 120}, the third quartile is 15. *See also:* median, first quartile, interquartile range.

Transitivity principle for indirect measurement. If the length of object A is greater than the length of object B, and the length of object B is greater than the length of object C, then the length of object A is greater than the length of object C. This principle applies to measurement of other quantities as well.

Uniform probability model. A probability model which assigns equal probability to all outcomes. *See also:* probability model.

Vector. A quantity with magnitude and direction in the plane or in space, defined by an ordered pair or triple of real numbers.

Visual fraction model. A tape diagram, number line diagram, or area model.

Whole numbers. The numbers 0, 1, 2, 3, ….

[5]Adapted from Wisconsin Department of Public Instruction, *op. cit*.

Table 1. Common addition and subtraction situations.[6]

	Result Unknown	Change Unknown	Start Unknown
Add to	Two bunnies sat on the grass. Three more bunnies hopped there. How many bunnies are on the grass now? 2 + 3 = ?	Two bunnies were sitting on the grass. Some more bunnies hopped there. Then there were five bunnies. How many bunnies hopped over to the first two? 2 + ? = 5	Some bunnies were sitting on the grass. Three more bunnies hopped there. Then there were five bunnies. How many bunnies were on the grass before? ? + 3 = 5
Take from	Five apples were on the table. I ate two apples. How many apples are on the table now? 5 – 2 = ?	Five apples were on the table. I ate some apples. Then there were three apples. How many apples did I eat? 5 – ? = 3	Some apples were on the table. I ate two apples. Then there were three apples. How many apples were on the table before? ? – 2 = 3
Put Together/ Take Apart[2]	**Total Unknown**	**Addend Unknown**	**Both Addends Unknown[1]**
	Three red apples and two green apples are on the table. How many apples are on the table? 3 + 2 = ?	Five apples are on the table. Three are red and the rest are green. How many apples are green? 3 + ? = 5, 5 – 3 = ?	Grandma has five flowers. How many can she put in her red vase and how many in her blue vase? 5 = 0 + 5, 5 = 5 + 0 5 = 1 + 4, 5 = 4 + 1 5 = 2 + 3, 5 = 3 + 2
Compare[3]	**Difference Unknown**	**Bigger Unknown**	**Smaller Unknown**
	("How many more?" version): Lucy has two apples. Julie has five apples. How many more apples does Julie have than Lucy? ("How many fewer?" version): Lucy has two apples. Julie has five apples. How many fewer apples does Lucy have than Julie? 2 + ? = 5, 5 – 2 = ?	(Version with "more"): Julie has three more apples than Lucy. Lucy has two apples. How many apples does Julie have? (Version with "fewer"): Lucy has 3 fewer apples than Julie. Lucy has two apples. How many apples does Julie have? 2 + 3 = ?, 3 + 2 = ?	(Version with "more"): Julie has three more apples than Lucy. Julie has five apples. How many apples does Lucy have? (Version with "fewer"): Lucy has 3 fewer apples than Julie. Julie has five apples. How many apples does Lucy have? 5 – 3 = ?, ? + 3 = 5

[1]These take apart situations can be used to show all the decompositions of a given number. The associated equations, which have the total on the left of the equal sign, help children understand that the = sign does not always mean makes or results in but always does mean is the same number as.
[2]Either addend can be unknown, so there are three variations of these problem situations. Both Addends Unknown is a pro- ductive extension of this basic situation, especially for small numbers less than or equal to 10.
[3]For the Bigger Unknown or Smaller Unknown situations, one version directs the correct operation (the version using more for the bigger unknown and using less for the smaller unknown). The other versions are more difficult.

[6]Adapted from Box 2-4 of Mathematics Learning in Early Childhood, National Research Council (2009, pp. 32, 33).

Table 2. Common multiplication and division situations.[7]

	Unknown Product	Group Size Unknown ("How many in each group?" Division)	Number of Groups Unknown ("How many groups?" Division)
	3 × 6 = ?	3 × ? = 18, and 18 ÷ 3 = ?	? × 6 = 18, and 18 ÷ 6 = ?
Equal Groups	There are 3 bags with 6 plums in each bag. How many plums are there in all? *Measurement example*. You need 3 lengths of string, each 6 inches long. How much string will you need altogether?	If 18 plums are shared equally into 3 bags, then how many plums will be in each bag? *Measurement example*. You have 18 inches of string, which you will cut into 3 equal pieces. How long will each piece of string be?	If 18 plums are to be packed 6 to a bag, then how many bags are needed? *Measurement example*. You have 18 inches of string, which you will cut into pieces that are 6 inches long. How many pieces of string will you have?
Arrays,[4] Area[5]	There are 3 rows of apples with 6 apples in each row. How many apples are there? *Area example*. What is the area of a 3 cm by 6 cm rectangle?	If 18 apples are arranged into 3 equal rows, how many apples will be in each row? *Area example*. A rectangle has area 18 square centimeters. If one side is 3 cm long, how long is a side next to it?	If 18 apples are arranged into equal rows of 6 apples, how many rows will there be? *Area example*. A rectangle has area 18 square centimeters. If one side is 6 cm long, how long is a side next to it?
Compare	A blue hat costs $6. A red hat costs 3 times as much as the blue hat. How much does the red hat cost? *Measurement example*. A rubber band is 6 cm long. How long will the rubber band be when it is stretched to be 3 times as long?	A red hat costs $18 and that is 3 times as much as a blue hat costs. How much does a blue hat cost? *Measurement example*. A rubber band is stretched to be 18 cm long and that is 3 times as long as it was at first. How long was the rubber band at first?	A red hat costs $18 and a blue hat costs $6. How many times as much does the red hat cost as the blue hat? *Measurement example*. A rubber band was 6 cm long at first. Now it is stretched to be 18 cm long. How many times as long is the rubber band now as it was at first?
General	$a \times b = ?$	$a \times ? = p$, and $p \div a = ?$	$? \times b = p$, and $p \div b = ?$

[4]The language in the array examples shows the easiest form of array problems. A harder form is to use the terms rows and columns: The apples in the grocery window are in 3 rows and 6 columns. How many apples are in there? Both forms are valuable.
[5]Area involves arrays of squares that have been pushed together so that there are no gaps or overlaps, so array problems include these especially important measurement situations.

[7]The first examples in each cell are examples of discrete things. These are easier for students and should be given before the measurement examples.

Table 3. The properties of operations. Here *a*, *b* and *c* stand for arbitrary numbers in a given number system. The properties of operations apply to the rational number system, the real number system, and the complex number system.

Associative property of addition	$(a + b) + c = a + (b + c)$ a
Commutative property of addition Additive	$+ b = b + a$
identity property of 0 Existence of additive	$a + 0 = 0 + a = a$
inverses Associative property of	For every a there exists $-a$ so that $a + (-a) = (-a) + a = 0$. $(a \times$
multiplication Commutative property of	$b) \times c = a \times (b \times c)$
multiplication Multiplicative identity property	$a \times b = b \times a$ a
of 1 Existence of multiplicative inverses	$\times 1 = 1 \times a = a$
Distributive property of multiplication over addition	For every $a \neq 0$ there exists $1/a$ so that $a \times 1/a = 1/a \times a = 1$.
	$a \times (b + c) = a \times b + a \times c$

Table 4. The properties of equality. Here *a*, *b* and *c* stand for arbitrary numbers in the rational, real, or complex number systems.

Reflexive property of equality	$a = a$
Symmetric property of equality	If $a = b$, then $b = a$.
Transitive property of equality	If $a = b$ and $b = c$, then $a = c$. If
Addition property of equality	$a = b$, then $a + c = b + c$. If $a =$
Subtraction property of equality	b, then $a - c = b - c$. If $a = b$,
Multiplication property of equality	then $a \times c = b \times c$.
Division property of equality	If $a = b$ and $c \neq 0$, then $a \div c = b \div c$.
Substitution property of equality	If $a = b$, then b may be substituted for a
	in any expression containing a.

Table 5. The properties of inequality. Here *a*, *b* and *c* stand for arbitrary numbers in the rational or real number systems.

Exactly one of the following is true: $a < b$, $a = b$, $a > b$.
If $a > b$ and $b > c$ then $a > c$.
If $a > b$, then $b < a$. If
$a > b$, then $-a < -b$.
If $a > b$, then $a \pm c > b \pm c$.
If $a > b$ and $c > 0$, then $a \times c > b \times c$. If
$a > b$ and $c < 0$, then $a \times c < b \times c$. If a
$> b$ and $c > 0$, then $a \div c > b \div c$. If $a >$
b and $c < 0$, then $a \div c < b \div c$.

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IDAHO CONTENT STANDARDS
~~GRADE K- 2~~
PHYSICAL EDUCATION

Kindergarten-2nd Grade

Physical literacy: Possessing both the knowledge and ability to move with competence and confidence in a wide variety of physical activities in multiple environments that benefit the healthy development of the whole person.

Standard 1: Skilled Movement

Goal 1.1: ~~Demonstrate~~ The physically literate individual demonstrates competency in motor skills and movement patterns needed to perform a variety of physical activities.

Objective(s): By the end of grade 2, students will:

K-2.PE.1.1.1 Achieve mature forms in the basic locomotor skills (e.g., walking, running, skipping~~, etc.~~) and vary the manner in which these skills are performed during changing conditions and expectations (e.g., the elements of movement, levels, speeds, pathways, relationships, and effort).

K-2.PE.1.1.2 Demonstrate smooth transitions between sequential locomotor, non-locomotor, and manipulative skills~~(e.g. PEmetrics, etc.)~~.

K-2.PE.1.1.3 ~~Achieve mature~~ Demonstrate emerging form in the less complex manipulative skills (e.g., ~~underhand~~ throwing, catching, rolling~~, etc.~~) and show progress toward achieving mature form in the more complex manipulative skills (e.g., ~~foot~~ dribbl~~e~~ing, overhand throw, kicking, striking~~etc.~~).

K-2.PE.1.1.4 Demonstrate control in non-locomotor skills (e.g., twisting, bending, weight-transfer~~, etc.~~) as well as weight-bearing and balancing on a variety of body parts (e.g.,, symmetrical/asymmetrical, stork stand, partner balances~~, etc.~~).

Standard 2: Movement Knowledge

Goal 2.1: ~~Demonstrate understanding of movement concepts, principles, strategies and tactics as they apply to the learning and performance of physical activities~~The physically literate individual demonstrates understanding of concepts, principles, strategies, and tactics related to movement and to the performance of physical activities.~~.~~

Objective(s): By the end of grade 2, students will:

K-2.PE.2.1.1 Identify simple biomechanical principles (e.g., opposition, weight transfer, wide base of support for stability~~, etc.~~).

K-2.PE.2.1.2 Identify and apply critical cues and concepts of body, space, effort, time, and relationships that vary the quality of movement (e.g., side to target, move in personal space, throw hard for distance, name different pathways~~, etc.~~).

~~Standard 3: Valuing a Physically Active Lifestyle~~

~~Goal 3.1: Participate daily in physical activity for health, enjoyment and/or satisfaction, challenge, self-expression and/or social interaction.~~

~~Objective(s): By the end of grade 2, students will:~~

~~K2.PE.3.1.1 Participate in developmentally appropriate moderate to vigorous physical activity a minimum of 33% of the lesson time (e.g., time assessment, pedometer = 1800 steps in a 30 minute class or 60 steps per minute, etc.).~~

~~K-2.PE.3.1.2 Participate daily in moderate to vigorous physical activity during and outside of class as recommended by NASPE, CDC, and USDHHS of at least 60 minutes or more per day (e.g., activity logs, step count of at least 12000 steps per day, activity breaks, etc.).~~

~~K-2.PE.3.1.3 Express feelings about participation appropriately during physical activity (e.g., use of emoticons like smiley faces and thumb up/down, etc.).~~

Standard ~~4~~3: Health-Enhancing Personal Fitness

Goal ~~4~~3.1: ~~Achieve and maintain a health-enhancing level of physical fitness.~~The physically literate individual demonstrates the knowledge and skills to achieve and maintain a health-enhancing level of physical fitness.

Objective(s): By the end of grade 2, students will:

K-2.PE.~~4~~3.1.1 Engage in a variety of activities that promote 5 health~~-related~~ enhancing physical fitness components (e.g., jumping rope, riding a bicycle, ~~animal walks,~~walking like an animal, climbing ~~rope~~ wall, chasing and fleeing games, tumbling activities, ~~dance~~ dancing skills, walking/running program, ~~etc.~~).

K-2.PE.~~4~~3.1.2 Know and demonstrate basic knowledge of health-related fitness including cardiorespiratory endurance, muscular strength and muscular endurance, flexibility, and body composition (~~e.g.,~~i.e., identify various activities that demonstrate each health-related component~~, etc.~~).

K-2.PE.~~4~~3.1.3 Recognize physiological signs associated with participation in moderate-to-vigorous physical activity (e.g., sweating, fast heart rate, heavy breathing, muscle fatigue~~etc.~~).

Standard ~~5~~4: Personal and Social Responsibility

Goal ~~5~~4.1: ~~Exhibit responsible and social behavior that respects self and others in physical activity settings.~~ The physically literate individual exhibits responsible personal and social behavior that respects self and others in physical activity settings.

Objective(s): By the end of grade 2, students will:

K-2.PE.~~5~~4.1.1 Apply physical education class rules, procedures, and safe practices (e.g., listen/respond to teacher and peers, respect personal space, follow directions~~, etc~~).

K-2.PE.~~5~~4.1.2 Interact cooperatively using interpersonal communication during partner and small group activities (e.g., taking turns, sharing equipment, helping others~~, etc~~).

K-2.PE.~~5~~4.1.3 Work together to problem solve, complete a task, and/or tackle a challenge (e.g., rock/paper/scissors, sharing, partner games~~, etc~~).

Standard 5: Valuing a Physically Active Lifestyle

Goal 5.1: The physically literate individual participates daily in physical activity and recognizes its value for health, enjoyment, challenge, self-expression, and/or social interaction.

Objective(s): By the end of grade 2, students will:

K2.PE.5.1.1 Participate in developmentally appropriate moderate to vigorous physical activity a minimum of 33% of the lesson time (e.g., time assessment, pedometer = 1800 steps in a 30 minute class or 60 steps per minute).

K-2.PE.5.1.2 Participate daily in moderate to vigorous physical activity during and outside of class as recommended within the public health guidelines of at least 60 minutes or more per day (e.g., activity logs, step count of at least 12000 steps per day, activity breaks).

K-2.PE.5.1.3 Express feelings appropriately about participation during physical activity (e.g., use of emoticons like smiley faces and thumb up/down).

IDAHO CONTENT STANDARDS
~~GRADE 3-5~~
PHYSICAL EDUCATION

Grade 3-5

Physical literacy: Possessing both the knowledge and ability to move with competence and confidence in a wide variety of physical activities in multiple environments that benefit the healthy development of the whole person.

Standard 1: Skilled Movement

Goal 1.1: ~~Demonstrate~~ The physically literate individual demonstrates competency in motor skills and movement patterns needed to perform a variety of physical activities.

Objective(s): By the end of grade 5, students will:

3-5.PE.1.1.1 Apply fundamental, non-locomotor, locomotor, and manipulative skills in dynamic and complex movements (e.g., lead-up games, dance, educational gymnastics~~, etc.~~).

3-5.PE.1.1.2 Demonstrate emerging mature movement~~s~~ patterns using ~~concepts of effort~~ varying levels of intensity, relationships, and body and space awareness (e.g., dodging, weight transfer, offensive and defensive tactics and strategies).

~~.~~

3-5.PE.1.1.3 Demonstrate a wide variety of specialized skills (e.g., passing a ball, softball fielding, defensive sliding, grapevine dance step, rollerblading heel stop, bicycle signaling~~, etc.~~).

Standard 2: Movement Knowledge

Goal 2.1: ~~Demonstrate understanding of movement concepts, principles, strategies and tactics as they apply to the learning and performance of physical activities.~~The physically literate individual demonstrates understanding of concepts, principles, strategies and tactics related to movement and to the performance of physical activities.

Objective(s): By the end of grade 5, students will:

3-5.PE.2.1.1 ~~Utilize~~Demonstrate knowledge of critical cues and simple biomechanical principles to provide feedback to self and others (e.g., speed, agility, effort, opposition, balance, ~~Did I~~ follow through~~?~~, self and peer checklist~~, etc.~~).

3-5.PE.2.1.2 Transfer concepts to new skills/games (e.g., offensive and defensive strategies, ~~bending the knees lowers the~~ center of gravity and ~~increases~~ stability, rhythm and timing, aim adjustment, placement, accuracy, scoring strategy,~~etc.~~).

3-5.PE.2.1.3 Identify ways to improve performance (e.g., appropriate practice, learn techniques, positive ~~self talk~~self-talk, visualize performance, positive specific feedback~~etc.~~).

~~**Standard 3: Valuing a Physically Active Lifestyle**~~

~~**Goal 3.1: Participate daily in physical activity for health, enjoyment and/or satisfaction, challenge, self-expression and/or social interaction.**~~

~~**Objective(s): By the end of grade 5, students will:**~~

~~3-5.PE.3.1.1 Participate in developmentally appropriate moderate to vigorous physical activity a minimum of 33% of the lesson time (e.g., time assessment, pedometer = 1800 steps in a 30 minute class or 60 steps per minute, etc.).~~

~~3-5.PE.3.1.2 Participate daily in moderate to vigorous physical activity during and outside of class as recommended by NASPE, CDC, and USDHHS of at least 60 minutes or more per day (e.g., activity logs, step count of at least 12000 steps per day, activity breaks, etc.).~~

~~3-5.PE.3.1.3 Identify and/or make use of opportunities at school and within the community for regular participation in physical activity (e.g., enroll in organized school activity, etc.).~~

~~3-5.PE.3.1.4 Seek personally challenging experiences in physical activity (e.g., sets realistic improvement goals for a greater challenge in existing activity, etc.).~~

Standard ~~4~~3: Health Enhancing Personal Fitness

Goal ~~4~~3.1: ~~Achieve and maintain a health-enhancing level of physical fitness.~~ The physically literate individual demonstrates the knowledge and skills to achieve and maintain a health-enhancing level of physical fitness.

Objective(s): By the end of grade 5, students will:

3-5.PE.~~4~~3.1.1 ~~Know and demonstrate~~ Understand the 5 health-related fitness components (cardiorespiratory endurance, muscular strength, ~~and~~ muscular endurance, flexibility, and body composition) by improving, meeting, and/or sustaining ~~gender and age-related contemporary fitness standards as defined by approved tests~~ performance on evidence-based fitness standards (e.g., ~~Fitnessgram or President's Council~~ evidence-based fitness tests, healthy fitness ~~zone/~~level, ~~identify various~~ activities that demonstrate each health-related component~~, etc.~~).

3-5.PE.~~4~~3.1.2 Regularly participate in moderate-to-vigorous physical activity ~~which~~ that improves physical fitness (e.g., physical education class, home/school/community programs~~, etc.~~).

3-5.PE.~~4~~3.1.3 With teacher assistance, interpret the results and significance of information provided by formal measures of physical fitness and set and achieve attainable personal health-related fitness goals (e.g., ~~Physical Best, goal setting,~~ evidence-based fitness results~~etc.~~).

Standard ~~5~~4: Personal and Social Responsibility

Goal ~~5~~4.1:~~-~~ ~~Exhibit responsible and social behavior that respects self and others in physical activity settings.~~ The physically literate individual exhibits responsible personal and social behavior that respects self and others in physical activity settings.

Objective(s): By the end of grade 5, students will:

3-5.PE.~~5~~4.1.1 Identify the purposes for and follow safe practices, rules, procedures, and etiquette (e.g., help a peer, use equipment appropriately, accept teacher decision regarding a rule infraction without blaming, show respect, honesty and fairness~~etc.~~).

3-5.PE.~~5~~4.1.2 Work independently and cooperatively in groups to complete tasks and challenges (e.g., develop a creative game, practice to improve performance in and out of school, team building challenges, create task cards, provide assistance to the teacher and other students~~etc.~~).

3-5.PE.~~5~~4.1.3 Appreciate the diversity of other~~s~~ people by cooperating with those of a different gender, race, ethnicity, and ability (e.g. dancing with a peer of a different gender, ~~modify~~ modifying an activity for inclusion; participating in cultural games, encouraging others~~etc.~~)

Standard 5: Valuing a Physically Active Lifestyle

Goal 5.1: The physically literate individual participates daily in physical activity and recognizes its value for health, enjoyment, challenge, self-expression and/or social interaction.

Objective(s): By the end of grade 5, students will:

3-5.PE.5.1.1 Participate in developmentally appropriate moderate to vigorous physical activity a minimum of 33% of the lesson time (e.g., time assessment, pedometer = 1800 steps in a 30 minute class or 60 steps per minute).

3-5.PE.5.1.2 Participate daily in moderate to vigorous physical activity during and outside of class as recommended by NASPE, CDC, and USDHHS of at least 60 minutes or more per day within the public health guidelines (e.g., student-initiated involvement, before and after school programs, community fitness events, run/walk programs).

3-5.PE.5.1.3 Seek personally challenging experiences in physical activity (e.g., personal fitness goals, attempt new activities, set realistic improvement goals for a greater challenge in existing activity).

IDAHO CONTENT STANDARDS
~~GRADE 6-8~~
PHYSICAL EDUCATION

Grade 6-8

Physical literacy: Possessing both the knowledge and ability to move with competence and confidence in a wide variety of physical activities in multiple environments that benefit the healthy development of the whole person.

Standard 1: Skilled Movement

Goal 1.1: ~~Demonstrate~~ The physically literate individual demonstrates competency in motor skills and movement patterns needed to perform a variety of physical activities.

Objective(s): By the end of grade 8, students will:

6-8.PE.1.1.1 Demonstrate mature form in the basic skills of more specialized activities (e.g., wall/net, invasion, field/striking, target, dance, aquatics, outdoor activities, fitness, resistance training ~~etc.~~).

6-8.PE.1.1.2 Adapt and combine skills successfully in modified games or activities of increasing complexity. ~~and in combination with other basic skills.~~

6-8.PE.1.1.3 Demonstrate movement tactics and strategies that can be applied to a variety of ~~sports and~~ physical activities (e.g., wall/net, invasion, field/striking, target, dance, aquatics, outdoor activities, fitness, resistance training~~etc.~~).

Standard 2: Movement Knowledge

Goal 2.1: ~~Demonstrate understanding of movement concepts, principles, strategies and tactics as they apply to the learning and performance of physical activities.~~The physically literate individual demonstrates understanding of concepts, principles, strategies and tactics related to movement and to the performance of physical activities.

Objective(s): By the end of grade 8, students will:

6-8.PE.2.1.1 Identify and apply the critical elements, strategies, and tactics of higher level movements in wall/net, invasion, field/striking, target, dance, outdoor activities, outdoor ethics, fitness~~, etc.,~~ (e.g., transition from offense to defense, ~~leave no trace,~~ shortest distance, angles of interception~~, fluid sequential movement, etc.~~).

6-8.PE.2.1.2 Identify principles of practice and biomechanics that enhance movement performance (e.g., describe basic principles of training and how they improve fitness, describe ~~why extending the elbow~~

~~in striking skills is important,~~ the purpose behind the mechanics and range of motion required in various physical activities~~etc.~~).

6-8.PE.2.1.3 Apply external feedback to guide and improve performance (e.g., use videos to refine skills, utilize verbal feedback to improve performance~~, etc.~~).

~~**Standard 3: Valuing a Physically Active Lifestyle**~~

~~**Goal 3.1: Participate daily in physical activity for health, enjoyment and/or satisfaction, challenge, self-expression and/or social interaction.**~~

~~**Objective(s): By the end of grade 8, students will:**~~

~~6-8.PE.3.1.1 Participate in developmentally appropriate moderate to vigorous physical activity a minimum of 50% of the lesson time (e.g., time assessment, pedometer = 3200 steps in a 40 minute lesson or 80 steps per minute, etc.).~~

~~6-8.PE.3.1.2 Participate daily in moderate to vigorous physical activity during and outside of class as recommended by NASPE, CDC, and USDHHS of at least 60 minutes or more per day (e.g., activity logs, step count of at least 12000 steps per day, activity breaks, etc.).~~

~~6-8.PE.3.1.3 Explore a variety of challenging physical activities for personal interest, self-expression and social interaction in a variety of settings including school, home, workplace, and community (e.g., bowling, golf, recreational teams, lessons, camping, etc.).~~

~~6-8.PE.3.1.4 Describe the challenges found both in experiencing high levels of competition and in learning new and/or different activities (e.g., journaling, videos, blogs, etc.).~~

Standard 43: Health Enhancing Personal Fitness

Goal 43.1: ~~Achieve and maintain a health-enhancing level of physical fitness.~~ The physically literate individual demonstrates the knowledge and skills to achieve and maintain a health-enhancing level of physical fitness.

Objective(s): By the end of grade 8, students will:

6-8.PE.43.1.1 Know and demonstrate the 5 health-related fitness components ~~including~~ (cardiorespiratory endurance, muscular strength, ~~and~~ muscular endurance, flexibility, and body composition) by improving, meeting and/or sustaining gender and age-related contemporary fitness standards ~~as defined by approved tests~~ (e.g., ~~Fitnessgram or President's Council~~ evidence-based fitness tests, healthy fitness ~~zone/~~level, ~~identify various~~ activities that demonstrate each health-related component~~, etc.~~).

6-8.PE.43.1.2 Know and demonstrate the basic knowledge of skill-related fitness including agility, coordination, balance, power, reaction time, and speed (e.g., ~~President's Council, assessment series from NASPE~~, resistance training techniques, combatives, sprint starts, vertical/standing jump, pilates~~, etc.~~).

6-8.PE.~~4~~3.1.3 Participate in a variety of developmentally appropriate health~~-related~~ and skill-related fitness activities in diverse settings including school, home, ~~workplace,~~ and community (e.g., hiking, swimming, orienteering, rock climbing, fun runs, social dance~~, etc.~~).

6-8.PE.~~4~~3.1.4 Assess physiological indicators of exercise during and after physical activity (e.g., target heart rate zone, perceived exertion~~, etc.~~).

6-8.PE.~~4~~3.1.5 Apply basic principles and types of training to improve fitness goals (e.g., ~~frequency, intensity,~~ FITT principle, ~~-~~progression, specificity, rest and recovery, overload, regularity, interval training, ~~fartlek~~Fartlek, circuit training, resistance training~~, etc.~~).

Standard ~~5~~4: Personal and Social Responsibility

Goal ~~5~~4.1:~~-~~ ~~Exhibit responsible and social behavior that respects self and others in physical activity settings.~~ The physically literate individual exhibits responsible personal and social behavior that respects self and others in physical activity settings.

Objective(s): By the end of grade 8, students will:

6-8.PE.~~5~~4.1.1 Apply safe practices, ethical behavior, and positive forms of social interaction when participating in physical activities (e.g., participate within the rules of an activity, display good sportsmanship, practice self-control~~, etc.~~).

6-8.PE.~~5~~4.1.2 Solve problems by analyzing potential consequences when confronted with a behavioral choice (e.g., resolve argument between peers, be sensitive of the rights and feelings of others, role play~~, case studies, etc.~~).

6-8.PE.~~5~~4.1.3 Work independently and in groups to achieve goals in competitive and cooperative settings (e.g., identify ways to relieve stress, develop team goals, practice for competition, sport education, adventure activities, and/or challenge activities~~, etc.~~).

6-8.PE.~~5~~4.1.4 Appreciate other~~s~~ people of diverse characteristics and backgrounds during physical activity (e.g., invite others with differences to participate in an activity, work cooperatively with peers of diverse skill levels, cultural activities/projects, and/or peer mentoring~~, etc.~~).

6-8.PE.~~5~~4.1.5 Recognize the role of ~~sport and~~ physical activity in influencing personal and social behavior (e.g., identify positive and negative behaviors of sport figures, develop leadership skills, take responsibility ~~of~~ for actions, recognize the importance of individual roles in group activities~~, etc.~~).

Standard 5: Valuing a Physically Active Lifestyle

Goal 5.1: The physically literate individual participates daily in physical activity and recognizes its value for health, enjoyment, challenge, self-expression, and/or social interaction.

Objective(s): By the end of grade 8, students will:

- 6-8.PE.5.1.1 Participate in developmentally appropriate moderate to vigorous physical activity a minimum of 50% of the lesson time (e.g., time assessment, pedometer = 3200 steps in a 40 minute lesson or 80 steps per minute).
- 6-8.PE.5.1.2 In combination with the activity acquired in Physical Education class, students should accumulate a total of at least 60 minutes of moderate to vigorous physical activity throughout the day as recommended within the public health guidelines (e.g., activity logs, step count of at least 12000 steps per day, activity breaks).
- 6-8.PE.5.1.3 Explore a variety of challenging physical activities for personal interest, self-expression and social interaction in a variety of settings including school, home, workplace, and community (e.g., bowling, golf, recreational teams, sports camps/lessons, fitness club membership, camping).
- 6-8.PE.5.1.4 Enjoy the challenge of working hard and feel satisfaction when successful in improving skills and developing personal goals (e.g., surveys, tracking, data).

IDAHO CONTENT STANDARDS
~~GRADE 9-12~~
PHYSICAL EDUCATION

Grade 9-12

Physical literacy: Possessing both the knowledge and ability to move with competence and confidence in a wide variety of physical activities in multiple environments that benefit the healthy development of the whole person.

Standard 1: Skilled Movement

Goal 1.1: ~~Demonstrate~~ The physically literate individual demonstrates competency in motor skills and movement patterns needed to perform a variety of physical activities.

Objective(s): By the end of grade 12, students will:

9-12.PE.1.1.1 Demonstrate competency in basic and advanced skills and tactics in ~~at least five~~ multiple leisure and lifetime physical activities (e.g., individual/dual/team-related sports, outdoor pursuits, ~~rhythm,~~ dance, resistance training, fitness, ~~and~~ aquatics).

Standard 2: Movement Knowledge

Goal 2.1: ~~Demonstrate understanding of movement concepts, principles, strategies and tactics as they apply to the learning and performance of physical activities.~~The physically literate individual demonstrates understanding of concepts, principles, strategies, and tactics related to movement and to the performance of physical activities.

Objective(s): By the end of grade 12, students will:

9-12.PE.2.1.1 Demonstrate the knowledge and understanding necessary to develop scientifically based personal activity plans that include self-selected physical activities ~~and sports~~ (e.g., physical activity goal setting, fitness profiles and assessments~~, mypyramid.gov nutrition~~).

9-12.PE.2.1.2 ~~Utilize complex movement concepts and principles to independently refine skills and apply them to the learning of new skills~~Apply internal and external feedback to independently assess and refine skills. Transfer previously learned skills and apply them to the learning of new skills (e.g., ~~utilizing anaerobic and aerobic performance appropriately, applying the concept of spin to a variety of activities to improve performance, biomechanical efficiency to conserve energy,~~ video, self-assessments, peer-assessments).

9-12.PE.2.1.3 Evaluate and apply appropriate tactics and strategies in a variety of ~~sports and~~ physical activities (e.g., using trekking poles to improve efficiency, ~~recognize elite level~~ comparing and contrasting various levels of ~~-~~performance, explaining tactical strategies in a game ~~of softball~~or sport).

~~**Standard 3: Valuing a Physically Active Lifestyle**~~

~~**Goal 3.1: Participate daily in physical activity for health, enjoyment and/or satisfaction, challenge, self-expression and/or social interaction.**~~

~~**Objective(s): By the end of grade 12, students will:**~~

~~9-12.PE.3.1.1 Participate in moderate to vigorous physical activity for at least of 50% of the lesson time (e.g., time assessment, pedometer = 3200 steps in a 40 minute lesson or 80 steps per minute - block or traditional schedule, etc.).~~

~~9-12.PE.3.1.2 Participate daily in moderate to vigorous physical activity during and outside of class as recommended by NASPE, CDC, and USDHHS of at least 60 minutes or more per day (e.g., activity logs, step count of at least 12000 steps per day, activity breaks, etc.).~~

~~9-12.PE.3.1.3 Provide rationale about their physical activity participation for health and manage participation based on personal interests, capabilities, and resources (e.g., develop individual physical activity plan, journaling, etc.).~~

~~9-12.PE.3.1.4 Analyze factors that influence personal physical activity patterns over one's lifespan (e.g., reflections on volunteer efforts with populations of various ages and abilities, personal profile, family physical activity tree, create personal activity pyramid, etc.).~~

~~9-12.PE.3.1.5 Enjoy the challenge of working hard to better their skills and feel satisfaction when they are successful in improving and pursuing personal goals (e.g., journaling reflections, etc.).~~

Standard ~~4~~3: Health Enhancing Personal Fitness

Goal ~~4~~3.1: ~~Achieve and maintain a health-enhancing level of physical fitness.~~The physically literate individual demonstrates the knowledge and skills to achieve and maintain a health-enhancing level of physical fitness.

Objective(s): By the end of grade 12, students will:

9-12.PE.~~4~~3.1.1 ~~Demonstrate health-related fitness components~~ Assume greater self-responsibility for improving, meeting and/or sustaining gender and age-related contemporary fitness standards for the 5 health-related fitness components ~~-~~(cardiorespiratory endurance, muscular strength and endurance, flexibility, and body composition) by improving, meeting and/or sustaining gender and age-related contemporary fitness standards as defined by ~~approved tests (e.g., Fitnessgram or President's Council healthy fitness zone/level, identify various activities~~(e.g., evidence-based fitness tests, log sheets, fitness profiles, task cards, portfolios, and identify/ participate in various activities that demonstrate each health-related component~~, etc.~~).

9-12.PE.~~4~~3.1.2 ~~Assume greater self-responsibility to improve, meet, and/or sustain gender and age-related contemporary fitness standards necessary for a healthy productive life as defined by approved tests such as Fitnessgram or President's Council healthy fitness zone/level~~ Apply knowledge of skill-related fitness components including agility, coordination, balance, power, reaction time, and speed to improve performance (e.g., ~~log sheets, fitness profiles, task cards, portfolios,~~ resistance training technique, combatives, sprint starts, vertical/standing jump, pilates ~~etc.~~).

9-12.PE.~~4~~3.1.3 Interpret and analyze information from fitness tests ~~to plan and design individual programs for achieving and maintaining current/lifelong fitness goals that encompass all components of fitness~~ and physiological indicators of exercise to develop a rationale for a personal fitness plan (e.g., ~~select various activities from skill- and health-related components, set goals, fitness plan, assessment and evaluation, website programs for lifelong fitness planning,~~ identifying strengths and weaknesses, setting goals, modifying activities~~etc.~~).

9-12.PE.3.1.4 Design individual programs for achieving and maintaining current/lifelong fitness goals that encompass all components of fitness, types of training, and training principles (e.g., FITT principle, overload, progression, specificity, rest and recovery, utilize technology-based tools for lifelong fitness planning).

Standard ~~5~~4: Personal and Social Responsibility

Goal ~~5~~4.1: ~~Exhibit responsible and social behavior that respects self and others in physical activity settings.~~The physically literate individual exhibits responsible personal and social behavior that respects self and others in physical activity settings.

Objective(s): By the end of grade 12, students will:

9-12.PE.~~5~~4.1.1 Demonstrate the ability to initiate responsible personal and social behavior, function independently, and positively influence the behavior of others in physical activity settings (e.g., ~~develop code of ethics, sportsmanship recognition, volunteer Special Olympics, assist in an elementary physical education class,~~ respectful sportsmanship, self-control, role-modeling~~etc.~~).

9-12.PE.~~5~~4.1.2 Demonstrate leadership by holding ~~themselves~~ oneself and others responsible for following safe practices, rules, procedures, and etiquette in physical activity settings (e.g., ~~assumes an active leader and/or supportive role as appropriate during a ropes course activity,~~ acknowledge a rule infraction, ~~plan and lead a backpacking trip, coordinate a fun run, respecting others space in a weight room,~~ adhere to spotting protocols in a weight room, assign team/player roles~~etc.~~).

9-12.PE.~~5~~4.1.3 Respond appropriately to ~~potentially explosive~~unacceptable interactions with others in order to mediate and resolve conflict (e.g., communicate~~s~~ in a calm and controlled manner to inflammatory remarks, ~~role play, debate behaviors that occur in current events~~, listen to both sides of an argument and agree on a conclusion, report serious offenses, identify alternative to negative behaviors, ~~etc.~~).

9-12.PE.~~5~~4.1.4 ~~Synthesize and evaluate knowledge regarding the role of physical activity in a culturally diverse society~~Accept other people with different interests, cultural backgrounds, physical characteristics and abilities while engaging in physical activities (e.g., ~~identify barriers and opportunities for physical activity in the community, document the influence of cultural events on one's own physical activity behavior, interpret the meaning of physical activity through forms of expression such as art, poetry, writing, film, movement;~~ modify physical activities, show compassion for others~~etc.~~).

9-12.PE.~~5~~4.1.5 Evaluate personal choices for engaging in physical activity over the life span including the influence of age, ability, gender, race, ethnicity, socioeconomic status, and culture (e.g., ~~the impact of family physical activity on self; successes, challenges and enjoyment in lifelong physical activities; the effect of dance, fitness or recreational activities on senior citizens; critique economic commitments,~~ recognize barriers and opportunities to participate in physical activity across a lifespan~~etc.~~).

Standard 5: Valuing a Physically Active Lifestyle

Goal 5.1: The physically literate individual participates daily in physical activity and recognizes its value for health, enjoyment, challenge, self-expression and/or social interaction.

Objective(s): By the end of grade 12, students will:

9-12.PE.5.1.1 Participate in moderate to vigorous physical activity for at least of 50% of the lesson time (e.g., time assessment, pedometer = 3200 steps in a 40 minute lesson or 80 steps per minute - block or traditional schedule).

9-12.PE.5.1.2 In combination with the activity acquired in Physical Education class, students should accumulate a total of at least 60 minutes of moderate to vigorous physical activity throughout the day as recommended within public health guidelines (e.g., activity logs, step count of at least 12000 steps per day, activity breaks).

9-12.PE.5.1.3 Actively and independently pursue physical activity opportunities outside of the school based on personal interests, capabilities, and resources (e.g., outdoor recreational pursuits, fitness club membership, walking/running club, active transportation, state rationale for physical activity choices).

9-12.PE.5.1.4 Analyze factors that influence personal physical activity patterns over one's lifespan (e.g., reflections on volunteer efforts with populations of various ages and abilities, personal profile, family physical activity tree, create personal activity pyramid).

9-12.PE.5.1.5 Enjoy the challenge of working hard and feel satisfaction when they are successful in improving skills and developing personal goals (e.g., journaling reflections).

IDAHO CONTENT STANDARDS
KINDERGARTEN
SOCIAL STUDIES

Standard 1: History

Students in Kindergarten build an understanding of the cultural and social development of the United States.

Goal 1.1: Build an understanding of the cultural and social development of the United States.

Objective(s): By the end of Kindergarten, the student will be able to:

K.SS.1.1.1 Share stories, pictures, and music of one's own personal life, family and culture.
K.SS.1.1.2 Describe how families celebrate in many different ways.
K.SS.1.1.3 Describe how individuals have similarities and differences.
K.SS.1.1.4 Describe how each person is special and unique within the classroom.

Goal 1.2: Trace the role of migration and immigration of people in the development of the United States.

No objectives at this grade level

Goal 1.3: Identify the sovereign status and role of American Indians in the development of the United States.

No objectives at this grade level

Goal 1.4: Analyze the political, social, and economic responses to industrialization and technological innovations in the development of the United States.

No objectives at this grade level

Goal 1.5: Trace the role of exploration and expansion in the development of the United States.

No objectives at this grade level

Goal 1.6: Explain the rise of human civilization.

No objectives at this grade level

Goal 1.7: Trace how natural resources and technological advances have shaped human civilization.

No objectives at this grade level

Goal 1.8: Build an understanding of the cultural and social development of human civilization.

No objectives at this grade level

Goal 1.9: Identify the role of religion in the development of human civilization.

No objectives at this grade level

Standard 2: Geography

Students in Kindergarten analyze the spatial organizations of people, places and environment on the earth's surface.

Goal 2.1: Analyze the spatial organizations of people, places, and environment on the earth's surface.

Objective(s): By the end of Kindergarten, the student will be able to:

- K.SS.2.1.1 Identify the globe as a model of the earth.
- K.SS.2.1.2 Distinguish between land masses and water on a globe or map.
- K.SS.2.1.3 Identify the north and south poles on a map or globe.
- K.SS.2.1.4 Recognize a map of the United States of America and know it is the country in which we live.
- K.SS.2.1.5 Make and use a map of a familiar area.
- K.SS.2.1.6 Recognize a map of Idaho and know it is the state in which we live.

Goal 2.2: Explain how human actions modify the physical environment and how physical systems affect human activity and living conditions.

No objectives at this grade level

Goal 2.3: Trace the migration and settlement of human populations on the earth's surface.

No objectives at this grade level

Goal 2.4: Analyze the human and physical characteristics of different places and regions.

No objectives at this grade level

Goal 2.5: Explain how geography enables people to comprehend the relationships between people, places, and environments over time.

No objectives at this grade level

Standard 3: Economics

Students in Kindergarten explain basic economic concepts.

Goal 3.1: Explain basic economic concepts.

Objective(s): By the end of Kindergarten, the student will be able to:

K.SS.3.1.1 Observe that all people have needs and wants.
K.SS.3.1.2 Recognize that people have limited resources.
K.SS.3.1.3 Describe some jobs that people do to earn money/rewards.

Goal 3.2: Identify different influences on economic systems.

No objectives at this grade level

Goal 3.3: Analyze the different types of economic institutions.

No objectives at this grade level

Goal 3.4: Explain the concepts of ~~good~~ personal finance.

No objectives at this grade level

Standard 4: Civics and Government

Students in Kindergarten build an understanding of the foundational principles of the American political system, the organization and formation of the American system of government, and that all people in the United States have rights and assume responsibilities.

Goal 4.1: Build an understanding of the foundational principles of the American political system.

Objective(s): By the end of Kindergarten, the student will be able to:

K.SS.4.1.1 Name some rules and the reasons for them.
K.SS.4.1.2 Discuss how individuals and groups make decisions and solve problems.
K.SS.4.1.3 Identify personal traits, such as courage, honesty, and responsibility.

Goal 4.2: Build an understanding of the organization and formation of the American system of government.

Objective(s): By the end of Kindergarten, the student will be able to:

K.SS.4.2.1 Identify symbols of the United States such as the flag, Pledge of Allegiance, Bald Eagle, red, white, and blue, Statue of Liberty, and the President.
K.SS.4.2.2 Recite the Pledge of Allegiance.
K.SS.4.2.3 Describe holidays, and tell why they are commemorated in the United States, such as Thanksgiving, Martin Luther King, Jr. Day, Independence Day, and Presidents' Day.

Goal 4.3: Build an understanding that all people in the United States have rights and assume responsibilities.

Objective(s): By the end of Kindergarten, the student will be able to:

K.SS.4.3.1 Identify individuals who are helpful to people in their everyday lives.
K.SS.4.3.2 Identify ways to be helpful to family and school.

Goal 4.4: Build an understanding of the evolution of democracy.

No objectives at this grade level

Goal 4.5: Build an understanding of comparative government.

No objectives at this grade level

Standard 5: Global Perspectives

Students in Kindergarten build an understanding of multiple perspectives and global interdependence.

Goal 5.1: Build an understanding of multiple perspectives and global interdependence.

Objective(s): By the end of Kindergarten, the student will be able to:

K.SS.5.1.1 Name family traditions that came to America from other parts of the world.

IDAHO CONTENT STANDARDS
GRADE 1
SOCIAL STUDIES

Standard 1: History

Students in Grade 1 build an understanding of the cultural and social development of the United States.

Goal 1.1: Build an understanding of the cultural and social development of the United States.

Objective(s): By the end of Grade 1, the student will be able to:

1.SS.1.1.1 Recognize that each person belongs to many groups such as family, school, friends, and neighborhood.
1.SS.1.1.2 Compare differences in the ways American families live today to how they lived in the past.
1.SS.1.1.3 Use timelines to show personal and family history.
1.SS.1.1.4 Compare personal histories, pictures, and music of other selected times and places in America's past.

Goal 1.2: Trace the role of migration and immigration of people in the development of the United States.

No objectives at this grade level

Goal 1.3: Identify the sovereign status and role of American Indians in the development of the United States.

No objectives at this grade level

Goal 1.4: Analyze the political, social, and economic responses to industrialization and technological innovations in the development of the United States.

No objectives at this grade level

Goal 1.5: Trace the role of exploration and expansion in the development of the United States.

No objectives at this grade level

Goal 1.6: Explain the rise of human civilization.

No objectives at this grade level

Goal 1.7: Trace how natural resources and technological advances have shaped human civilization.

No objectives at this grade level

Goal 1.8: Build an understanding of the cultural and social development of human civilization.

No objectives at this grade level

Goal 1.9: Identify the role of religion in the development of human civilization.

No objectives at this grade level

Standard 2: Geography

Students in Grade 1 analyze the spatial organizations of people, places and environment on the earth's surface and explain how human actions modify the physical environment and how physical systems affect human activity and living conditions.

Goal 2.1: Analyze the spatial organizations of people, places and environment on the earth's surface.

Objective(s): By the end of Grade 1, the student will be able to:

- 1.SS.2.1.1 Explain what maps and globes represent and how they are used.
- 1.SS.2.1.2 Use directions on a map: East, West, South, and North.
- 1.SS.2.1.3 Identify legends and keys on maps.
- 1.SS.2.1.4 Identify continents and large bodies of water on a globe or a map.
- 1.SS.2.1.5 Name and locate continent, country, state, and community in which the class lives.

Goal 2.2: Explain how human actions modify the physical environment and how physical systems affect human activity and living conditions.

Objective(s): By the end of Grade 1, the student will be able to:

- 1.SS.2.2.1 Describe ways people adjust to their environment.
- 1.SS.2.2.2 Identify the ways people modify their environment.

Goal 2.3: Trace the migration and settlement of human populations on the earth's surface.

No objectives at this grade level

Goal 2.4: Analyze the human and physical characteristics of different places and regions.

No objectives at this grade level

Goal 2.5: Explain how geography enables people to comprehend the relationships between people, places, and environments over time.

No objectives at this grade level

<u>Standard 3</u>: Economics

Students in Grade 1 explain basic economic concepts and explain the concepts of ~~good~~ personal finance.

Goal 3.1: Explain basic economic concepts.

Objective(s): By the end of Grade 1, the student will be able to:

- 1.SS.3.1.1 Identify the basic needs of people, such as food, clothing, and shelter.
- 1.SS.3.1.2 Identify ways people meet their needs by sharing, trading, and using money to buy goods and services.
- 1.SS.3.1.3 Name things that people may want but do not need and explain the difference.

Goal 3.2: Identify different influences on economic systems.

No objectives at this grade level

Goal 3.3: Analyze the different types of economic institutions.

No objectives at this grade level

Goal 3.4: Explain the concepts of ~~good~~ personal finance.

Objective(s): By the end of Grade 1, the student will be able to:

- 1.SS.3.4.1 Identify ways to save money for future needs and wants.

<u>Standard 4</u>: Civics and Government

Students in Grade 1 build an understanding of the foundational principles of the American political system, the organization and formation of the American system of government, and that all people in the United States rights and assume responsibilities.

Goal 4.1: Build an understanding of the foundational principles of the American political system.

Objective(s): By the end of Grade 1, the student will be able to:

- 1.SS.4.1.1 Explain why rules are necessary at home and school.
- 1.SS.4.1.2 Create rules and explain why rules must be applied fairly.
- 1.SS.4.1.3 Discuss how <u>individuals and</u> groups make decisions and solve problems, such as voting and consensus.
- 1.SS.4.1.4 Identify personal traits, such as courage, honesty, and responsibility.

Goal 4.2: Build an understanding of the organization and formation of the American system of government.

Objective(s): By the end of Grade 1, the student will be able to:

- 1.SS.4.2.1 Identify the significance of symbols in the United States.

1.SS.4.2.2 Recite the Pledge of Allegiance.
1.SS.4.2.3 Describe holidays and events, and tell why they are commemorated in the United States.

Goal 4.3: Build an understanding that all people in the United States have rights and assume responsibilities.

Objective(s): By the end of Grade 1, the student will be able to:
1.SS.4.3.1 Identify individuals who are helpful to people in their everyday lives.
1.SS.4.3.2 Name some responsibilities that students have at home and school.

Goal 4.4: Build an understanding of the evolution of democracy.

No objectives at this grade level

Goal 4.5: Build an understanding of comparative government.

No objectives at this grade level

Standard 5: Global Perspectives

Students in Grade 1 build an understanding of multiple perspectives and global interdependence.

Goal 5.1: Build an understanding of multiple perspectives and global interdependence.

Objective(s): By the end of Grade 1, the student will be able to:
1.SS.5.1.1 Compare family life in other parts of the world.
1.SS.5.1.2 Discuss family structures and daily routines of various cultures around the world.

IDAHO CONTENT STANDARDS
GRADE 2
SOCIAL STUDIES

Students are expected to know content and apply skills from previous grades.

Standard 1: History

Students in Grade 2 build an understanding of the cultural and social development of the United States.

Goal 1.1: Build an understanding of the cultural and social development of the United States.

Objective(s): By the end of Grade 2, the student will be able to:

2.SS.1.1.1 Discuss different groups that a person belongs to, such as family and neighborhood, and how those roles and/or groups have changed or stayed the same.

Goal 1.2: Trace the role of migration and immigration of people in the development of the United States.

No objectives at this grade level

Goal 1.3: Identify the sovereign status and role of American Indians in the development of the United States.

No objectives at this grade level

Goal 1.4: Analyze the political, social, and economic responses to industrialization and technological innovations in the development of the United States.

No objectives at this grade level

Goal 1.5: Trace the role of exploration and expansion in the development of the United States.

No objectives at this grade level

Goal 1.6: Explain the rise of human civilization.

No objectives at this grade level

Goal 1.7: Trace how natural resources and technological advances have shaped human civilization.

No objectives at this grade level

Goal 1.8: Build an understanding of the cultural and social development of human civilization.

No objectives at this grade level

Goal 1.9: Identify the role of religion in the development of human civilization.

No objectives at this grade level

<u>Standard 2</u>**: Geography**

Students in Grade 2 analyze the spatial organizations of people, places, and environment on the earth's surface and explain how human actions modify the physical environment and how physical systems affect human activity and living conditions.

Goal 2.1: Analyze the spatial organizations of people, places, and environment on the earth's surface.

Objective(s): By the end of Grade 2, the student will be able to:

- 2.SS.2.1.1 Identify landforms, bodies of water, and human made features such as cities and dams on a map and globe.
- 2.SS.2.1.2 State the cardinal directions and how to use a compass rose.
- 2.SS.2.1.3 Show that map symbols such as key, legend, and scale represent a real object or place.
- 2.SS.2.1.4 Illustrate that boundary lines separate states.

Goal 2.2: Explain how human actions modify the physical environment and how physical systems affect human activity and living conditions.

Objective(s): By the end of Grade 2, the student will be able to:

- 2.SS.2.2.1 Compare how environmental conditions affect living styles and clothing in different parts of the country.
- 2.SS.2.2.2 Describe how humans depend on the environment to meet their basic needs.

Goal 2.3: Trace the migration and settlement of human populations on the earth's surface.

No objectives at this grade level

Goal 2.4: Analyze the human and physical characteristics of different places and regions.

No objectives at this grade level

Goal 2.5: Explain how geography enables people to comprehend the relationships between people, places, and environments over time.

No objectives at this grade level

Standard 3: Economics

Students in Grade 2 explain basic economic concepts, identify different influences on economic systems, and explain the concepts of ~~good~~ personal finance.

Goal 3.1: Explain basic economic concepts.

Objective(s): By the end of Grade 2, the student will be able to:

2.SS.3.1.1 Identify wants and needs of ~~all~~ families.
2.SS.3.1.2 Define income, and identify different ways to earn and save.
2.SS.3.1.3 Identify the difference between goods and services.
2.SS.3.1.4 Identify differences between producers and consumers.

Goal 3.2: Identify different influences on economic systems.

Objective(s): By the end of Grade 2, the student will be able to:

2.SS.3.2.1 Explain how natural resources affect economic activities in the local community.

Goal 3.3: Analyze the different types of economic institutions.

No objectives at this grade level

Goal 3.4: Explain the concepts of ~~good~~ personal finance.

Objective(s): By the end of Grade 2, the student will be able to:

2.SS.3.4.1 Identify reasons people save money.

Standard 4: Civics and Government

Students in Grade 2 build an understanding of the foundational principles of the American political system, the organization and formation of the American system of government, and that all people in the United States have rights and assume responsibilities.

Goal 4.1: Build an understanding of the foundational principles of the American political system.

Objective(s): By the end of Grade 2, the student will be able to:

2.SS.4.1.1 Explain why rules are necessary at home, ~~and~~ school, and in the neighborhood.
2.SS.4.1.2 Explain that there are benefits for following the rules and consequences for breaking the rules at home, ~~and~~ school, and in the neighborhood.
2.SS.4.1.3 Identify the people or groups that make, apply, and enforce rules at home, ~~and~~ school, and in the neighborhood.

Goal 4.2: Build an understanding of the organization and formation of the American system of government.

Objective(s): By the end of Grade 2, the student will be able to:

2.SS.4.2.1 Explain important customs, symbols, and celebrations that represent the development of American beliefs and principles.

2.SS.4.2.2 ~~State~~ Examine the meaning of key words in the Pledge of Allegiance.

Goal 4.3: Build an understanding that all people in the United States have rights and assume responsibilities.

Objective(s): By the end of Grade 2, the student will be able to:

2.SS.4.3.1 Identify characteristics of good citizenship, such as courage, honesty, and responsibility.

2.SS.4.3.2 ~~Name~~ Identify historic and contemporary people who model characteristics of good citizenship.

Goal 4.4: Build an understanding of the evolution of democracy.

No objectives at this grade level

Goal 4.5: Build an understanding of comparative government.

No objectives at this grade level

Standard 5: Global Perspectives

Students in Grade 2 identify the importance of respecting multiple perspectives and global interdependence.

Goal 5.1: Build an understanding of multiple perspectives and global interdependence.

Objective(s): By the end of Grade 2, the student will be able to:

2.SS.5.1.1 Compare your neighborhood~~s~~/community~~ies~~ to others in various parts of the world.

2.SS.5.1.2 Compare traditions in your neighborhood/community with those practiced in other parts of the world.

IDAHO CONTENT STANDARDS
GRADE 3
SOCIAL STUDIES

Students are expected to know content and apply skills from previous grades.

Standard 1: History

Students in Grade 3 build an understanding of the cultural and social development of the United States, ~~and~~ trace the role of migration and immigration of people in the development of the United States, and identify the sovereign status and role of American Indians in the development of the United States.

Goal 1.1: Build an understanding of the cultural and social development of the United States.

Objective(s): By the end of Grade 3, the student will be able to:

- 3.SS.1.1.1 Explain that people in the United States share a ~~common heritage~~ national identity through patriotic ~~holidays and~~ symbols and holidays.
- 3.SS.1.1.2 Investigate the history of your community.
- 3.SS.1.1.3 Compare different cultural groups in the community, including their distinctive foods, clothing styles, and traditions.
- 3.SS.1.1.4 Identify and describe ways families, groups, tribes and communities influence the individual's daily life and personal choices.

Goal 1.2: Trace the role of migration and immigration of people in the development of the United States.

Objective(s): By the end of Grade 3, the student will be able to:

- 3.SS.1.2.1 Share the origins of classmates' ancestors.
- 3.SS.1.2.2 Describe how migration and immigration are continuous processes.
- 3.SS.1.2.3 Identify reasons for voluntary ~~immigration~~ and involuntary movement of people to and from your community.

Goal 1.3: Identify the sovereign status and role of American Indians in the development of the United States.

~~No objectives at this grade level~~

Objective(s): By the end of Grade 3, the student will be able to:

- 3.SS.1.3.1 Identify characteristics of different cultural groups in your community including American Indians.

Goal 1.4: Analyze the political, social, and economic responses to industrialization and technological innovations in the development of the United States.

No objectives at this grade level

Goal 1.5: Trace the role of exploration and expansion in the development of the United States.

No objectives at this grade level

Goal 1.6: Explain the rise of human civilization.

No objectives at this grade level

Goal 1.7: Trace how natural resources and technological advances have shaped human civilization.

No objectives at this grade level

Goal 1.8: Build an understanding of the cultural and social development of human civilization.

No objectives at this grade level

Goal 1.9: Identify the role of religion in the development of human civilization.

No objectives at this grade level

Standard 2: Geography

Students in Grade 3 analyze the spatial organizations of people, places, and environment on the earth's surface and trace the migration and settlement of human populations on the earth's surface.

Goal 2.1: Analyze the spatial organizations of people, places, and environment on the earth's surface.

Objective(s): By the end of Grade 3, the student will be able to:

- 3.SS.2.1.1 Describe the concepts of globe, continent, country, state, county, city/town, and neighborhood.
- 3.SS.2.1.2 Find the United States, Washington, D.C., Idaho, the state capital Boise, and your own community on a map.
- 3.SS.2.1.3 Locate on a map waterways, landforms, cities, states, and national boundaries using standard map symbols.
- 3.SS.2.1.4 Use a map title, map key, scale, cardinal directions, and symbols to interpret a map.
- 3.SS.2.1.5 Use a number/letter grid to find specific locations on a map.

Goal 2.2: Explain how human actions modify the physical environment and how physical systems affect human activity and living conditions.

No objectives at this grade level

Goal 2.3: Trace the migration and settlement of human populations on the earth's surface.

Objective(s): By the end of Grade 3, the student will be able to:

3.SS.2.3.1 Analyze past and present settlement patterns of the community.
3.SS.2.3.2 Identify geographic features influencing settlement patterns of the community.
3.SS.2.3.3 Compare and contrast city/suburb/town and urban/rural.

Goal 2.4: Analyze the human and physical characteristics of different places and regions.

No objectives at this grade level

Goal 2.5: Explain how geography enables people to comprehend the relationships between people, places, and environments over time.

No objectives at this grade level

Standard 3: Economics

Students in Grade 3 explain basic economic concepts, ~~*and*~~ identify different influences on economic systems, analyze the different types of economic institutions, and explain the concepts of ~~good~~ personal finance.

Goal 3.1: Explain basic economic concepts.

Objective(s): By the end of Grade 3, the student will be able to:

3.SS.3.1.1 Explain the concepts of supply and demand and the role of the consumer and producer.
3.SS.3.1.2 Explain the difference between public and private property.

Goal 3.2: Identify different influences on economic systems.

Objective(s): By the end of Grade 3, the student will be able to:

3.SS.3.2.1 Explain how land, natural resources, labor, trade, and/or technology affect economic activities in the local community.

Goal 3.3: Analyze the different types of economic institutions.

Objective(s): By the end of Grade 3, the student will be able to:

3.SS.3.3.1 Explain the purpose of a bank.

Goal 3.4: Explain the concepts of ~~good~~ personal finance.

Objective(s): By the end of Grade 3, the student will be able to:

3.SS.3.4.1 Describe the purposes and benefits of savings.

Standard 4: Civics and Government

Students in Grade 3 build an understanding of the foundational principles of the American political system, the organization and formation of the American system of government, and that all people in the United States have rights and assume responsibilities.

Goal 4.1: Build an understanding of the foundational principles of the American political system.

Objective(s): By the end of Grade 3, the student will be able to:

3.SS.4.1.1 Explain why communities have laws.
3.SS.4.1.2 Explain that there are benefits for following the laws and consequences for breaking the laws of the community.
3.SS.4.1.3 Identify the people or groups that make, apply, and enforce laws in the community.

Goal 4.2: Build an understanding of the organization and formation of the American system of government.

Objective(s): By the end of Grade 3, the student will be able to:

3.SS.4.2.1 Identify and explain the basic functions of local governments.
3.SS.4.2.2 Explain how local government officials are chosen, e.g., election, appointment.
3.SS.4.2.3 Describe services commonly and primarily provided by governments for the community.
3.SS.4.2.4 Identify local government officials.

Goal 4.3: Build an understanding that all people in the United States have rights and assume responsibilities.

Objective(s): By the end of Grade 3, the student will be able to:

3.SS.4.3.1 Identify ways children and adults can participate in their community and/or local governments.

Goal 4.4: Build an understanding of the evolution of democracy.

No objectives at this grade level

Goal 4.5: Build an understanding of comparative government.

No objectives at this grade level

Standard 5: Global Perspectives

Students in Grade 3 build an understanding of multiple perspectives and global interdependence.

Goal 5.1: Build an understanding of multiple perspectives and global interdependence.

Objective(s): By the end of Grade 3, the student will be able to:

- 3.SS.5.1.1 Explore connections that the local community has with other communities throughout the world.
- 3.SS.5.1.2 Examine the contributions from various cultures from other parts of the world to the development of the community and how they make that community unique.

IDAHO CONTENT STANDARDS
GRADE 4
SOCIAL STUDIES

Students are expected to know content and apply skills from previous grades.

Standard 1: History

Students in Grade 4 build an understanding of the cultural and social development of the United States, trace the role of migration and immigration of people in the development of the United States, and identify the sovereign status and role of American Indians in the development of the United States.

Goal 1.1: Build an understanding of the cultural and social development of the United States.

Objective(s): By the end of Grade 4, the student will be able to:

- 4.SS.1.1.1 Identify characteristics of different cultural groups in Idaho.
- 4.SS.1.1.~~1~~ 2 Describe ways that cultural groups have influenced and impacted each other.
- 4.SS.1.1.~~2~~ 3 Explain the role of explorers and missionaries in the development of Idaho.
- 4.SS.1.1.4 Discuss the treaty period for Idaho's federally recognized tribes including causes, events, and results.

Goal 1.2: Trace the role of migration and immigration of people in the development of the United States.

Objective(s): By the end of Grade 4, the student will be able to:

- 4.SS.1.2.1 Identify the major groups and significant individuals and their ~~motives in the~~ impact on western expansion and ~~settlement in~~ the creation of the State of Idaho.
- 4.SS.1.2.2 Describe the historic role of fur trading and the discovery of gold and ~~other minerals~~ silver in ~~the settlement of~~ Idaho.
- 4.SS.1.2.3 Analyze and describe the different immigrant experiences ~~in~~ across Idaho.
- 4.SS.1.2.4 Analyze and describe ~~how~~ the responses of Idaho's tribes to the effects of westward expansion ~~impacted the American Indians in Idaho~~ and subsequent federal policies.

Goal 1.3: Identify the sovereign status and role of American Indians in the development of the United States.

Objective(s): By the end of Grade 4, the student will be able to:

- 4.SS.1.3.1 Identify the five federally recognized American Indian tribes in Idaho: Coeur d'Alene, Kootenai, Shoshone-Bannock, Nez Perce, and Shoshone-Paiute Tribes and current reservation ~~boundaries~~ lands.

4.SS.1.3.2 Discuss ~~that although there are five federally recognized tribes in Idaho, there are many others in the state~~ how Idaho's tribes interacted with and impacted existing and newly arriving people.

4.SS.1.3.3 Identify and discuss similar and different key characteristics of American Indian tribes ~~and other cultural groups~~ in Idaho.

4.SS.1.3.4 Compare and contrast ~~how~~ past and current ~~Idaho~~ American Indian life ~~today differs from the life of these same groups many years ago~~ in Idaho.

4.SS.1.3.5 Identify ~~how American Indian tribes in Idaho governed themselves~~ the meaning of tribal sovereignty and its relationship at the local, state, and federal levels of government.

4.SS.1.3.6 Describe the preservation of American Indian resources including cultural materials, ~~and their use in everyday life.~~ history, language, and culture.

4.SS.1.3.7 Identify ~~current issues related to~~ and dispel misconceptions about American Indians ~~in present day Idaho~~ today.

Goal 1.4: Analyze the political, social, and economic responses to industrialization and technological innovations in the development of the United States.

No objectives at this grade level

Goal 1.5: Trace the role of exploration and expansion in the development of the United States.

No objectives at this grade level

Goal 1.6: Explain the rise of human civilization.

No objectives at this grade level

Goal 1.7: Trace how natural resources and technological advances have shaped human civilization.

No objectives at this grade level

Goal 1.8: Build an understanding of the cultural and social development of human civilization.

No objectives at this grade level

Goal 1.9: Identify the role of religion in the development of human civilization.

No objectives at this grade level

Standard 2: Geography

Students in Grade 4 analyze the spatial organizations of people, places and environment on the earth's surface and trace the migration and settlement of human populations on the earth's surface.

Goal 2.1: Analyze the spatial organizations of people, places and environment on the earth's surface.

Objective(s): By the end of Grade 4, the student will be able to:

- 4.SS.2.1.1 Use geographic skills to collect, analyze, interpret, and communicate data.
- 4.SS.2.1.2 Show on a map of the world the continents, oceans, landforms, poles, hemispheres, equator, and prime meridian in relation to Idaho.
- 4.SS.2.1.3 Use a number/letter grid to find specific locations on a map of Idaho.
- 4.SS.2.1.4 Describe the physical regions of Idaho, and identify major natural resources.

Goal 2.2: Explain how human actions modify the physical environment and how physical systems affect human activity and living conditions.

No objectives at this grade level

Goal 2.3: Trace the migration and settlement of human populations on the earth's surface.

Objective(s): By the end of Grade 4, the student will be able to:

- 4.SS.2.3.1 Analyze past and present settlement patterns in Idaho.
- 4.SS.2.3.2 Discuss the impact of ~~settlement~~ colonization in Idaho on American Indian tribal lands, such as aboriginal and/or ceded territories, and the Treaties of 1855 and 1863.
- 4.SS.2.3.3 Identify the geographic features of Idaho, and explain their impact on settlement.
- 4.SS.2.3.4 Compare and contrast: city/suburb/town, urban/rural, farm/factory, and agriculture/industry.

Goal 2.4: Analyze the human and physical characteristics of different places and regions.

No objectives at this grade level

Goal 2.5: Explain how geography enables people to comprehend the relationships between people, places, and environments over time.

No objectives at this grade level

Standard 3: Economics

Students in Grade 4 explain basic economic concepts, identify different influences on economic systems, and explain the concepts of ~~good~~ personal finance.

Goal 3.1: Explain basic economic concepts.

Objective(s): By the end of Grade 4, the student will be able to:

4.SS.3.1.1 ~~Compare~~ Describe and analyze how American Indians and early settlers met their basic needs of food, shelter, and water.
4.SS.3.1.2 Explain the concepts of supply and demand and scarcity.
4.SS.3.1.3 Explain the concepts of specialization and division of labor.
4.SS.3.1.4 Identify goods and services in early Idaho settlements.
4.SS.3.1.5 Explain the concept of public and private property in the development of Idaho.

Goal 3.2: Identify different influences on economic systems.

Objective(s): By the end of Grade 4, the student will be able to:

4.SS.3.2.1 Describe examples of historic and current technological innovations in relation to economic growth in Idaho.
4.SS.3.2.2 Describe how geographic features of Idaho have determined the economic base of Idaho's regions.

Goal 3.3: Analyze the different types of economic institutions.

No objectives at this grade level

Goal 3.4: Explain the concepts of ~~good~~ personal finance.

Objective(s): By the end of Grade 4, the student will be able to:

4.SS.3.4.1 Define entrepreneurship, and identify reasons for starting a business.

Standard 4: Civics and Government

Students in Grade 4 build an understanding of the foundational principles of the American political system, the organization and formation of the American system of government, that all people in the United States have rights and assume responsibilities, and the evolution of democracy.

Goal 4.1: Build an understanding of the foundational principles of the American political system.

Objective(s): By the end of Grade 4, the student will be able to:

4.SS.4.1.1 Identify the people and groups who make, apply, and enforce laws within state, local, and tribal governments.
4.SS.4.1.2 Explain that rules and laws can be used to protect rights, provide benefits, and assign responsibilities.

Goal 4.2: Build an understanding of the organization and formation of the American system of government.

Objective(s): By the end of Grade 4, the student will be able to:

4.SS.4.2.1 Explain the significance of Idaho symbols and the unique tribal seal of each federally recognized tribe in Idaho.

4.SS.4.2.2 ~~Describe the difference between~~ Identify and explain the basic functions of state, local, and tribal governments.

4.SS.4.2.3 ~~Identify and explain the basic functions of~~ Describe the governmental relationships between state, local, and tribal governments.

4.SS.4.2.4 Identify the three branches of state government and explain the major responsibilities of each.

4.SS.4.2.5 Discuss ~~current governmental organization of~~ the governing structure of American Indian tribes in Idaho.

Goal 4.3: Build an understanding that all people in the United States have rights and assume responsibilities.

Objective(s): By the end of Grade 4, the student will be able to:

4.SS.4.3.1 Name elected state ~~representatives at the legislative and executive branches~~ officials.

4.SS.4.3.2 Explain ways to contact elected state ~~representatives~~ officials.

4.SS.4.3.3 Identify ways people can monitor and influence the decisions and actions of their state and tribal governments.

Goal 4.4: Build an understanding of the evolution of democracy.

Objective(s): By the end of Grade 4, the student will be able to:

4.SS.4.4.1 Discuss the concepts of citizenship, popular ~~consent~~ sovereignty, respect for the individual, equality of opportunity, and personal liberty.

Goal 4.5: Build an understanding of comparative government.

No objectives at this grade level

Standard 5: Global Perspectives

Students in Grade 4 build an understanding of multiple perspectives and global interdependence.

Goal 5.1: Build an understanding of multiple perspectives and global interdependence.

Objective(s): By the end of Grade 4, the student will be able to:

4.SS.5.1.1 Analyze the roles and relationships of diverse groups of people from various parts of the world who have contributed to Idaho’s cultural heritage and impacted the state’s history.

4.SS.5.1.2 Discuss the challenges experienced by people from various cultural, racial, and religious groups that settled in Idaho from various parts of the world.

4.SS.5.1.3 Identify Idaho's role in the global economy.

4.SS.5.1.4 Identify the diversity within Idaho's tribes and develop an awareness of the shared experiences of indigenous populations in the world.

IDAHO CONTENT STANDARDS
GRADE 5
SOCIAL STUDIES

Students are expected to know content and apply skills from previous grades.

Standard 1: History

Students in Grade 5 build an understanding of the cultural and social development of the United States, trace the role of migration and immigration of people in the development of the United States, and identify the sovereign status and role of American Indians in the development of the United States.

Goal 1.1: Build an understanding of the cultural and social development of the United States.

Objective(s): By the end of Grade 5, the student will be able to:

- 5.SS.1.1.1 Describe the interactions between European colonists and established societies in North America.
- 5.SS.1.1.2 Discuss significant individuals who have been responsible for bringing about cultural and social changes in the United States.
- 5.SS.1.1.3 Identify and explain influential political and cultural groups and their impact on American history.
- 5.SS.1.1.4 Identify different examples of how religion has been an important influence in American history.
- 5.SS.1.1.5 Discuss how the establishment of the 13 original colonies contributed to the founding of the nation.
- 5.SS.1.1.6 ~~Discuss~~ Analyze the causes and effects of various compromises and conflicts in American history.

Goal 1.2: Trace the role of migration and immigration of people in the development of the United States.

Objective(s): By the end of Grade 5, the student will be able to:

- 5.SS.1.2.1 Discuss the religious, political, and economic motives of ~~voluntary European~~ immigrants to the United States.
- 5.SS.1.2.2 Explain the history of indentured servitude and the slave trade in the United States.
- 5.SS.1.2.3 Analyze and discuss the motives of the major groups who participated in western expansion.
- 5.SS.1.2.4 Discuss the ~~significant~~ American Indian groups encountered in western expansion.
- 5.SS.1.2.5 Discuss ~~the~~ significant individuals who took part in western expansion.
- 5.SS.1.2.6 Describe the impact of scientific and technological advances on westward expansion.

Goal 1.3: Identify the sovereign status and role of American Indians in the development of the United States.

Objective(s): By the end of Grade 5, the student will be able to:

5.SS.1.3.1 Discuss that American Indians were the first inhabitants of the United States.

5.SS.1.3.2 Identify examples of American Indian individual and collective contributions and influences in the development of the United States.

5.SS.1.3.3 Define the terms treaty, reservation, and sovereignty.

5.SS.1.3.4 Explain that reservations are lands that have been reserved by the tribes for their own use through treaties or executive orders and ~~was~~ were not "given" to them. The principle that land should be acquired from the Indians only through their consent with treaties involved three assumptions:

- That both parties to treaties were sovereign powers.
- That Indian tribes had some form of transferable title to the land.
- That acquisition of Indian land was solely a government matter not to be left to individual colonists or to the States.

Goal 1.4: Analyze the political, social, and economic responses to industrialization and technological innovations in the development of the United States.

No objectives at this grade level

Goal 1.5: Trace the role of exploration and expansion in the development of the United States.

No objectives at this grade level

Goal 1.6: Explain the rise of human civilization.

No objectives at this grade level

Goal 1.7: Trace how natural resources and technological advances have shaped human civilization.

No objectives at this grade level

Goal 1.8: Build an understanding of the cultural and social development of human civilization.

No objectives at this grade level

Goal 1.9: Identify the role of religion in the development of human civilization.

No objectives at this grade level

Standard 2: Geography

Students in Grade 5 analyze the spatial organizations of people, places and environment on the earth's surface.

Goal 2.1: Analyze the spatial organizations of people, places and environment on the earth's surface.

Objective(s): By the end of Grade 5, the student will be able to:

- 5.SS.2.1.1 Develop and use different kinds of maps, globes, graphs, charts, databases, and models to display and obtain information.
- 5.SS.2.1.2 Identify the regions of the United States and their resources.
- 5.SS.2.1.3 Use latitude and longitude coordinates to find specific locations on a map.
- 5.SS.2.1.4 Name and locate the 50 States and their Capitals, and U.S. Territories.
- 5.SS.2.1.5 Show on a map of the world the continents, oceans, landforms, poles, hemispheres, equator, and prime meridian.

Goal 2.2: Explain how human actions modify the physical environment and how physical systems affect human activity and living conditions.

No objectives at this grade level

Goal 2.3: Trace the migration and settlement of human populations on the earth's surface.

No objectives at this grade level

Goal 2.4: Analyze the human and physical characteristics of different places and regions.

No objectives at this grade level

Goal 2.5: Explain how geography enables people to comprehend the relationships between people, places, and environments over time.

No objectives at this grade level

Standard 3: Economics

Students in Grade 5 explain basic economic concepts, identify different influences on economic systems, and explain the concepts of ~~good~~ personal finance.

Goal 3.1: Explain basic economic concepts.

Objective(s): By the end of Grade 5, the student will be able to:

- 5.SS.3.1.1 Describe examples of improved transportation and communication networks and how they encourage economic growth.

5.SS.3.1.2 Explain the concepts of tariffs, taxation, and embargo.
5.SS.3.1.3 Describe the basic characteristics of a market.

Goal 3.2: Identify different influences on economic systems.

Objective(s): By the end of Grade 5, the student will be able to:
5.SS.3.2.1 Discuss the economic policies ~~of England~~ that contributed to ~~the revolt in~~ rebellion within the North American colonies.

Goal 3.3: Analyze the different types of economic institutions.

No objectives at this grade level

Goal 3.4: Explain the concepts of ~~good~~ personal finance.

Objective(s): By the end of Grade 5, the student will be able to:
5.SS.3.4.1 Identify economic incentives and risks ~~for~~ of entrepreneurship.
5.SS.3.4.2 Explain the impact of taxation on personal finance.

Standard 4: Civics and Government

Students in Grade 5 build an understanding of the foundational principles of the American political system, the organization and formation of the American system of government, that all people in the United States have rights and assume responsibilities, and the evolution of democracy.

Goal 4.1: Build an understanding of the foundational principles of the American political system.

Objective(s): By the end of Grade 5, the student will be able to:
5.SS.4.1.1 Identify the people and groups who make, apply, and enforce laws within federal and tribal governments.
5.SS.4.1.2 Identify and explain the important concepts in the Declaration of Independence.
5.SS.4.1.3 Discuss the significance of the Articles of Confederation as the transitional form of government.
5.SS.4.1.4 Identify the basic principles of the United States Constitution and Bill of Rights, ~~such~~ including popular sovereignty, limited government, separation of powers, ~~majority rule with minority rights~~, checks and balances, judicial review, and federalism.

Goal 4.2: Build an understanding of the organization and formation of the American system of government.

Objective(s): By the end of Grade 5, the student will be able to:
5.SS.4.2.1 Distinguish and compare responsibilities among state, national, and tribal governments in a federal system.

5.SS.4.2.2 Identify the three branches of government and the functions and powers of each.
5.SS.4.2.3 Explain the difference between State public lands and Federal public lands.

Goal 4.3: Build an understanding that all people in the United States have rights and assume responsibilities.

Objective(s): By the end of Grade 5, the student will be able to:
5.SS.4.3.1 ~~Name~~ Identify the President and Vice President of the United States and the United States senators and congressional representatives from Idaho.
5.SS.4.3.2 Identify some of the personal responsibilities and basic rights of individual freedoms that belong to American citizens.
5.SS.4.3.3 Describe ways in which citizens participate in public life.

Goal 4.4: Build an understanding of the evolution of democracy.

Objective(s): By the end of Grade 5, the student will be able to:
5.SS.4.4.1 Explain how the United States is a ~~democratic~~ republic.
5.SS.4.4.2 State the difference between direct democracy and the constitutional ~~representative democracy~~ republic of today's United States.
5.SS.4.4.3 Discuss the concepts of popular ~~consent~~ sovereignty, majority rule with minority rights, respect for the individual, equality of opportunity, rule of law, and personal liberty.

Goal 4.5: Build an understanding of comparative government.

No objectives at this grade level

Standard 5: Global Perspectives

Students in Grade 5 build an understanding of multiple perspectives and global interdependence.

Goal 5.1: Build an understanding of multiple perspectives and global interdependence.

Objectives(s): By the end of Grade 5, the student will be able to:
5.SS.5.1.1 Explain how the world is divided into many different nations and that each has its own government.
5.SS.5.1.2 Define a nation.
5.SS.5.1.3 Explain how the United States is one nation and how it interacts with other nations in the world.
5.SS.5.1.4 Discuss how nations try to resolve problems ~~peacefully~~.
5.SS.5.1.5 Identify the role of the United States in a global economy.

IDAHO CONTENT STANDARDS
GRADE 6-9
GEOGRAPHY-WESTERN HEMISPHERE

Students are expected to know content and apply skills from previous grades.

Standard 1: History

Students in Geography-Western Hemisphere build an understanding of the cultural and social development of human civilization.

Goal 1.1: Build an understanding of the cultural and social development of the United States.

No objectives in Geography–Western Hemisphere

Goal 1.2: Trace the role of migration and immigration of people in the development of the United States.

No objectives in Geography–Western Hemisphere

Goal 1.3: Identify the sovereign status and role of American Indians in the development of the United States.

No objectives in Geography–Western Hemisphere

Goal 1.4: Analyze the political, social, and economic responses to industrialization and technological innovations in the development of the United States.

No objectives in Geography–Western Hemisphere

Goal 1.5: Trace the role of exploration and expansion in the development of the United States.

No objectives in Geography–Western Hemisphere

Goal 1.6: Explain the rise of human civilization.

No objectives in Geography–Western Hemisphere

Goal 1.7: Trace how natural resources and technological advances have shaped human civilization.

No objectives in Geography–Western Hemisphere

Goal 1.8: Build an understanding of the cultural and social development of human civilization.

Objective(s): By the end of Geography-Western Hemisphere, the student will be able to:

6-9.GWH.1.8.1	Describe major aspects of the civilizations of the Western Hemisphere prior to European contact. ~~such as Mesoamerica.~~
6-9.GWH.1.8.2	Examine the impact of Europeans on indigenous cultures in the Western Hemisphere.
6-9.GWH.1.8.3	Compare various approaches to European colonization in the Western Hemisphere.
6-9.GWH.1.8.4	Explain how and why events may be interpreted differently according to the points of view of participants and observers.

Goal 1.9: Identify the role of religion in the development of human civilization.

No objectives in Geography–Western Hemisphere

Standard 2: Geography

Students in Geography-Western Hemisphere analyze the spatial organizations of people, places, and environment on the earth's surface, explain how human actions modify the physical environment and how physical systems affect human activity and living conditions, trace the migration and settlement of human populations on the earth's surface, analyze the human and physical characteristics of different places and regions, and explain how geography enables people to comprehend the relationships between people, places, and environments over time.

Goal 2.1: Analyze the spatial organizations of people, places, and environment on the earth's surface.

Objective(s): By the end of Geography-Western Hemisphere, the student will be able to:

6-9.GWH.2.1.1	Explain and use the components of maps, compare different map projections, and explain the appropriate uses for each.
6-9.GWH.2.1.2	Apply latitude and longitude to locate places on Earth and describe the uses of technology, such as Global Positioning Systems (GPS) and Geographic Information Systems (GIS).
6-9.GWH.2.1.3	Use mental maps to answer geographic questions.
6-9.GWH.2.1.4	Analyze visual and mathematical data presented in charts, tables, graphs, maps, and other graphic organizers to assist in interpreting a historical event.

Goal 2.2: Explain how human actions modify the physical environment and how physical systems affect human activity and living conditions.

Objective(s): By the end of Geography-Western Hemisphere, the student will be able to:

6-9.GWH.2.2.1	Explain how Earth/sun relationships, ocean currents, and winds influence climate differences on Earth.

6-9.GWH.2.2.2 Locate, map, and describe the climate regions of the Western Hemisphere and their impact on human activity and living conditions.

6-9.GWH.2.2.3 Identify major biomes and explain ways in which the natural environment and climate of places in the Western Hemisphere ~~relates to their climate~~ are related.

6-9.GWH.2.2.4 Analyze and give examples of the consequences of human impact on the physical environment. ~~and evaluate ways in which technology influences human capacity to modify the physical environment~~.

6-9.GWH.2.2.5 Evaluate ways in which technology influences human capacity to modify the physical environment.

6-9.GWH.2.2.6 Explain how physical processes have shaped Earth's surface. Classify these processes according to those that have built up Earth's surface (mountain-building and alluvial deposition) and those that wear away at Earth's surface (erosion).

Goal 2.3: Trace the migration and settlement of human populations on the earth's surface.

Objective(s): By the end of Geography-Western Hemisphere, the student will be able to:

6-9.GWH.2.3.1 Identify the names and locations of countries and major cities in the Western Hemisphere.

6-9.GWH.2.3.2 Describe major physical characteristics of regions in the Western Hemisphere.

6-9.GWH.2.3.3 Identify patterns of population distribution and growth in the Western Hemisphere and explain changes in these patterns which have occurred over time.

Goal 2.4: Analyze the human and physical characteristics of different places and regions.

Objective(s): By the end of Geography-Western Hemisphere, the student will be able to:

6-9.GWH.2.4.1 Use maps, charts, and graphs to compare rural and urban populations in selected countries in the Western Hemisphere.

6-9.GWH.2.4.~~1~~ 2 Describe major cultural characteristics of regions in the Western Hemisphere.

6-9.GWH.2.4.~~2~~ 3 Compare and contrast cultural patterns in the Western Hemisphere, such as language, religion, and ethnicity.

6-9.GWH.2.4.~~3~~ 4 Analyze the locations of the major manufacturing and agricultural regions of the Western Hemisphere.

Goal 2.5: Explain how geography enables people to comprehend the relationships between people, places, and environments over time.

Objective(s): By the end of Geography-Western Hemisphere, the student will be able to:

6-9.GWH.2.5.1 Analyze the distribution of natural resources in the Western Hemisphere.
6-9.GWH.2.5.2 Give examples of how both natural and technological hazards have impacted the physical environment and human populations in specific areas of the Western Hemisphere.
6-9.GWH.2.5.3 Give examples of how land forms, ~~and~~ water, climate, and natural vegetation have influenced historical trends and developments in the Western Hemisphere.
6-9.GWH.2.5.4 Identify contrasting perspectives of environmental issues that affect the Western Hemisphere.
6-9.GWH.2.5.5 Explain how human-induced changes in the physical environment in one place can cause changes in another place such as acid rain, air pollution, ~~and~~ water pollution, and deforestation.

Standard 3: Economics

Students in Geography-Western Hemisphere explain basic economic concepts and identify different influences on economic systems.

Goal 3.1: Explain basic economic concepts.

Objective(s): By the end of Geography-Western Hemisphere, the student will be able to:

6-9.GWH.3.1.1 Define abundance and scarcity and ~~its~~ their impact on decision making such as trade and settlement.

Goal 3.2: Identify different influences on economic systems.

Objective(s): By the end of Geography-Western Hemisphere, the student will be able to:

6-9.GWH.3.2.1 Describe how different economic systems in the Western Hemisphere answer the basic economic questions on what to produce, how to produce, and for whom to produce.
6-9.GWH.3.2.2 Compare the standard of living of various countries of the Western Hemisphere today using Gross Domestic Product (GDP) per capita as an indicator.
6-9.GWH.3.2.3 Analyze current economic issues in the countries of the Western Hemisphere using a variety of information resources.
6-9.GWH.3.2.4 Identify economic connections between a local community and the countries of the Western Hemisphere.
6-9.GWH.3.2.5 Identify specific areas of the Western Hemisphere with important natural resource deposits.
6-9.GWH.3.2.6 Investigate how physical geography, productive resources, specialization, and trade have influenced the way people earn income.

Goal 3.3: Analyze the different types of economic institutions.

No objectives in Geography–Western Hemisphere

Goal 3.4: Explain the concepts of ~~good~~ personal finance.

No objectives in Geography–Western Hemisphere

Standard 4: Civics and Government

Students in Geography-Western Hemisphere build an understanding of comparative government.

Goal 4.1: Build an understanding of the foundational principles of the American political system.

No objectives in Geography–Western Hemisphere

Goal 4.2: Build an understanding of the organization and formation of the American system of government.

No objectives in Geography–Western Hemisphere

Goal 4.3: Build an understanding that all people in the United States have rights and assume responsibilities.

No objectives in Geography–Western Hemisphere

Goal 4.4: Build an understanding of the evolution of democracy.

No objectives in Geography–Western Hemisphere

Goal 4.5: Build an understanding of comparative government.

Objective(s): By the end of Geography-Western Hemisphere, the student will be able to:

6-9.GWH.4.5.1 Identify the major forms of government in the Western Hemisphere and compare them with the United States.

6-9.GWH.4.5.2 Give examples of the different routes to independence from colonial rule taken by countries in the Western Hemisphere.

Standard 5: Global Perspectives

Students in Geography-Western Hemisphere build an understanding of multiple perspectives and global interdependence.

Goal 5.1: Build an understanding of multiple perspectives and global interdependence.

Objective(s): By the end of Geography-Western Hemisphere, the student will be able to:

6-9.GWH.5.1.1	Discuss how social institutions, including family, religion, and education, influence behavior in different societies in the Western Hemisphere.
6-9.GWH.5.1.2	Give examples of how language, literature, and the arts shaped the development and transmission of culture in the Western Hemisphere.
6-9.GWH.5.1.3	Define ethnocentrism and give examples of how this attitude can lead to cultural misunderstandings.
6-9.GWH.5.1.4	Discuss present conflicts between cultural groups and nation-states in the Western Hemisphere.
6-9.GWH.5.1.5	Give examples of the benefits of global connections, such as developing opportunities for trade, cooperating in seeking solutions to mutual problems, learning for technological advances, acquiring new perspectives, and benefiting from developments in architecture, music, and the arts.
6-9.GWH.5.1.6	Give examples of the causes and consequences of current global issues, such as the expansion of global markets, the urbanization of the developing world, the consumption of natural resources, and the extinction of species, and speculate possible responses by various individuals, groups, and nations.

IDAHO CONTENT STANDARDS
GRADE 6-9
GEOGRAPHY-EASTERN HEMISPHERE

Students are expected to know content and apply skills from previous grades.

Standard 1: History

Students in Geography-Eastern Hemisphere build an understanding of the cultural and social development of human civilization.

Goal 1.1: Build an understanding of the cultural and social development of the United States.

No objectives in Geography–Eastern Hemisphere

Goal 1.2: Trace the role of migration and immigration of people in the development of the United States.

No objectives in Geography–Eastern Hemisphere

Goal 1.3: Identify the sovereign status and role of American Indians in the development of the United States.

No objectives in Geography–Eastern Hemisphere

Goal 1.4: Analyze the political, social, and economic responses to industrialization and technological innovations in the development of the United States.

No objectives in Geography–Eastern Hemisphere

Goal 1.5: Trace the role of exploration and expansion in the development of the United States.

No objectives in Geography–Eastern Hemisphere

Goal 1.6: Explain the rise of human civilization.

No objectives in Geography–Eastern Hemisphere

Goal 1.7: Trace how natural resources and technological advances have shaped human civilization.

No objectives in Geography–Eastern Hemisphere

Goal 1.8: Build an understanding of the cultural and social development of human civilization.

Objective(s): By the end of Geography-Eastern Hemisphere, the student will be able to:

6-9.GEH.1.8.1	Describe major aspects of the civilizations of the Eastern Hemisphere prior to European contact.
6-9.GEH.1.8.2	Examine the impact of Europeans on indigenous cultures in the Eastern Hemisphere.
6-9.GEH.1.8.3	Compare various approaches to European colonization in the Eastern Hemisphere.
6-9.GEH.1.8.4	Explain how and why events may be interpreted differently according to the points of view of participants and observers.
6-9.GEH.1.8.5	Describe the historical origins, central beliefs, and spread of major religions, including Judaism, Christianity, Islam, Hinduism, Buddhism, and Confucianism.

Goal 1.9: Identify the role of religion in the development of human civilization.

No objectives in Geography–Eastern Hemisphere

Standard 2: Geography

Students in Geography-Eastern Hemisphere analyze the spatial organizations of people, places, and environment on the earth's surface, explain how human actions modify the physical environment and how physical systems affect human activity and living conditions, trace the migration and settlement of human populations on the earth's surface, analyze the human and physical characteristics of different places and regions, and explain how geography enables people to comprehend the relationships between people, places, and environments over time.

Goal 2.1: Analyze the spatial organizations of people, places, and environment on the earth's surface.

Objective(s): By the end of Geography-Eastern Hemisphere, the student will be able to:

6-9.GEH.2.1.1	Explain and use the components of maps, compare different map projections, and explain the appropriate uses for each.
6-9.GEH.2.1.2	Apply latitude and longitude to locate places on Earth and describe the uses of technology, such as Global Positioning Systems (GPS) and Geographic Information Systems (GIS).
6-9.GEH.2.1.3	Use mental maps to answer geographic questions.
6-9.GEH.2.1.4	Analyze visual and mathematical data presented in charts, tables, graphs, maps, and other graphic organizers to assist in interpreting a historical event.

Goal 2.2: Explain how human actions modify the physical environment and how physical systems affect human activity and living conditions.

Objective(s): By the end of Geography-Eastern Hemisphere, the student will be able to:

6-9.GEH.2.2.1 Explain how Earth/sun relationships, ocean currents, and winds influence climate differences on Earth.

6-9.GEH.2.2.2 Locate, map, and describe the climate regions of the Eastern Hemisphere and their impact on human activity and living conditions.

6-9.GEH.2.2.3 Identify major biomes and explain ways in which the natural environment and climate of places in the Eastern Hemisphere ~~relates to their climate~~ are related.

6-9.GEH.2.2.4 Analyze and give examples of the consequences of human impact on the physical environment.

6-9.GEH.2.2.5 Evaluate ways in which technology influences human capacity to modify the physical environment.

6-9.GEH.2.2.~~4~~ 6 Explain how physical processes have shaped Earth's surface. Classify these processes according to those that have built up Earth's surface (mountain-building and alluvial deposition) and those that wear away at Earth's surface (erosion).

~~6-9.GEH.2.2.5 Analyze and give examples of the consequences of human impact on the physical environment and evaluate ways in which technology influences human capacity to modify the physical environment.~~

Goal 2.3: Trace the migration and settlement of human populations on the earth's surface.

Objective(s): By the end of Geography-Eastern Hemisphere, the student will be able to:

6-9.GEH.2.3.1 Identify the names and locations of countries and major cities in the Eastern Hemisphere.

6-9.GEH.2.3.2 Describe major physical characteristics of regions in the Eastern Hemisphere.

6-9.GEH.2.3.3 Identify patterns of population distribution and growth in the Eastern Hemisphere, and explain changes in these patterns, which have occurred over time.

Goal 2.4: Analyze the human and physical characteristics of different places and regions.

Objective(s): By the end of Geography-Eastern Hemisphere, the student will be able to:

6-9.GEH.2.4.1 Use maps, charts, and graphs to compare rural and urban populations in selected countries in the Eastern Hemisphere.

6-9.GEH.2.4.2 Describe major cultural characteristics of regions in the Eastern Hemisphere.

6-9.GEH.2.4.~~2~~ 3 Compare and contrast cultural patterns in the Eastern Hemisphere, such as language, religion, and ethnicity.

6-9.GEH.2.4.~~3~~ 4 Analyze the locations of the major manufacturing and agricultural regions of the Eastern Hemisphere.

Goal 2.5: Explain how geography enables people to comprehend the relationships between people, places, and environments over time.

Objective(s): By the end of Geography-Eastern Hemisphere, the student will be able to:

6-9.GEH.2.5.1 Analyze the distribution of natural resources in the Eastern Hemisphere.

6-9.GEH.2.5.2 Give examples of how both natural and technological hazards have impacted the physical environment and human populations in specific areas of the Eastern Hemisphere.

6-9.GEH.2.5.3 Give examples of how land forms<u>,</u> ~~and~~ water, climate, and natural vegetation have influenced historical trends and developments in the Eastern Hemisphere.

6-9.GEH.2.5.4 Identify contrasting perspectives of environmental issues that affect the Eastern Hemisphere.

6-9.GEH.2.5.5 Explain how human-induced changes in the physical environment in one place can cause changes in another place, such as acid rain, air <u>pollution</u>, ~~and~~ water pollution, <u>and</u> deforestation.

<u>Standard 3</u>: Economics

Students in Geography-Eastern Hemisphere explain basic economic concepts and identify different influences on economic systems.

Goal 3.1: Explain basic economic concepts.

Objective(s): By the end of Geography-Eastern Hemisphere, the student will be able to:

6-9.GEH.3.1.1 Define <u>abundance and</u> scarcity and ~~its~~ <u>their</u> impact on decision making such as trade and settlement.

Goal 3.2: Identify different influences on economic systems.

Objective(s): By the end of Geography-Eastern Hemisphere, the student will be able to:

6-9.GEH.3.2.1 Describe how different economic systems in the Eastern Hemisphere answer the basic economic questions on what to produce, how to produce, and for whom to produce.

6-9.GEH.3.2.2 Compare the standard of living of various countries of the Eastern Hemisphere today using Gross Domestic Product (GDP) per capita as an indicator.

6-9.GEH.3.2.3 Analyze current economic issues in the countries of the Eastern Hemisphere using a variety of information resources.

6-9.GEH.3.2.4 Identify economic connections between a local community and the countries of the Eastern Hemisphere.

6-9.GEH.3.2.5 Identify specific areas of the Eastern Hemisphere with important natural resource deposits.

6-9.GEH.3.2.6 Investigate how physical geography, productive resources, specialization, and trade have influenced the way people earn income.

Goal 3.3: Analyze the different types of economic institutions.

No objectives in Geography–Eastern Hemisphere

Goal 3.4: Explain the concepts of ~~good~~ personal finance.

No objectives in Geography–Eastern Hemisphere

Standard 4: Civics and Government

Students in Geography-Eastern Hemisphere build an understanding of comparative government.

Goal 4.1: Build an understanding of the foundational principles of the American political system.

No objectives in Geography–Eastern Hemisphere

Goal 4.2: Build an understanding of the organization and formation of the American system of government.

No objectives in Geography–Eastern Hemisphere

Goal 4.3: Build an understanding that all people in the United States have rights and assume responsibilities.

No objectives in Geography–Eastern Hemisphere

Goal 4.4: Build an understanding of the evolution of democracy.

No objectives in Geography–Eastern Hemisphere

Goal 4.5: Build an understanding of comparative government.

Objective(s): By the end of Geography-Eastern Hemisphere, the student will be able to:

6-9.GEH.4.5.1 Identify the major forms of government in the Eastern Hemisphere and compare them with the United States.

6-9.GEH.4.5.2 Give examples of the different routes to independence from colonial rule taken by countries in the Eastern Hemisphere.

Standard 5: Global Perspectives

Students in Geography-Eastern Hemisphere build an understanding of multiple perspectives and global interdependence.

Goal 5.1: Build an understanding of multiple perspectives and global interdependence.

Objective(s): By the end of Geography-Eastern Hemisphere, the student will be able to:

6-9.GEH.5.1.1	Discuss how social institutions, including the family, religion, and education, influence behavior in different societies in the Eastern Hemisphere.
6-9.GEH.5.1.2	Give examples of how language, literature, and the arts shaped the development and transmission of culture in the Eastern Hemisphere.
6-9.GEH.5.1.3	Define ethnocentrism and give examples of how this attitude can lead to cultural misunderstandings.
6-9.GEH.5.1.4	Discuss present conflicts between cultural groups and nation-states in the Eastern Hemisphere.
6-9.GEH.5.1.5	Give examples of the benefits of global connections, such as developing opportunities for trade, cooperating in seeking solutions to mutual problems, learning for technological advances, acquiring new perspectives, and benefiting from developments in architecture, music, and the arts.
6-9.GEH.5.1.6	Give examples of the causes and consequences of current global issues, such as the expansion of global markets, the urbanization of the developing world, the consumption of natural resources, and the extinction of species, and speculate possible responses by various individuals, groups, and nations.

IDAHO CONTENT STANDARDS
GRADE 6-9
WORLD HISTORY AND CIVILIZATION

Students are expected to know content and apply skills from previous grades.

Standard 1: History

Students in World History and Civilization explain the rise of human civilization, trace how natural resources and technological advances have shaped human civilization, build an understanding of the cultural and social development of human civilization, and identify the role of religion in the development of human civilization.

Goal 1.1: Build an understanding of the cultural and social development of the United States.

No objectives in World History and Civilization

Goal 1.2: Trace the role of migration and immigration of people in the development of the United States.

No objectives in World History and Civilization

Goal 1.3: Identify the sovereign status and role of American Indians in the development of the United States.

No objectives in World History and Civilization

Goal 1.4: Analyze the political, social, and economic responses to industrialization and technological innovations in the development of the United States.

No objectives in World History and Civilization

Goal 1.5: Trace the role of exploration and expansion in the development of the United States.

No objectives in World History and Civilization

Goal 1.6: Explain the rise of human civilization.

Objective(s): By the end of World History and Civilization, the student will be able to:

6-9.WHC.1.6.1	Describe types of evidence used by anthropologists, archaeologists, and other scholars to reconstruct early human and cultural development.
6-9.WHC.1.6.2	Describe the characteristics of early hunter-gatherer communities.
6-9.WHC.1.6.3	Analyze the characteristics of early civilizations.

Goal 1.7: Trace how natural resources and technological advances have shaped human civilization.

Objective(s): By the end of World History and Civilization, the student will be able to:

6-9.WHC.1.7.1	Explain how man adapted the environment for civilization to develop.
6-9.WHC.1.7.2	Identify the technological advances developed by Ancient, Greco Roman, Middle Age, Early-Modern, and Modern ~~European~~ societies and civilizations.

Goal 1.8: Build an understanding of the cultural and social development of human civilization.

Objective(s): By the end of World History and Civilization, the student will be able to:

6-9.WHC.1.8.1	Find examples of how writing, art, architecture, mathematics, and science have evolved in ~~western~~ civilizations over time.
6-9.WHC.1.8.2	Identify the origins and characteristics of different social classes.
6-9.WHC.1.8.3	Describe how the structure of family changes in relation to socioeconomic conditions.

Goal 1.9: Identify the role of religion in the development of human civilization.

Objective(s): By the end of World History and Civilization, the student will be able to:

6-9.WHC.1.9.1	Explain the relationship between religion and the peoples understanding of the natural world.
6-9.WHC.1.9.2	Explain how religion shaped the development of ~~western~~ civilizations.
6-9.WHC.1.9.3	Discuss how religion influenced social behavior and created social order.
6-9.WHC.1.9.4	Describe why different religious beliefs were sources of conflict.

Standard 2: Geography

Students in World History and Civilization analyze the spatial organizations of people, places, and environment on the earth's surface, trace the migration and settlement of human populations on the earth's surface, analyze the human and physical characteristics of different places and regions, and explain how geography enables people to comprehend the relationships between people, places, and environments over time.

Goal 2.1: Analyze the spatial organizations of people, places, and environment on the earth's surface.

Objective(s): By the end of World History and Civilization, the student will be able to:

6-9.WHC.2.1.1 Develop and interpret different kinds of maps, globes, graphs, charts, databases, and models.

Goal 2.2: Explain how human actions modify the physical environment and how physical systems affect human activity and living conditions.

No objectives in World History and Civilization

Goal 2.3: Trace the migration and settlement of human populations on the earth's surface.

Objective(s): By the end of World History and Civilization, the student will be able to:

6-9.WHC.2.3.1 Identify main reasons for major migrations of people.
6-9.WHC.2.3.2 Explain how climate affects human migration and settlement.
6-9.WHC.2.3.3 Describe how physical features, such as mountain ranges, fertile plains, and rivers led to the development of cultural regions.
6-9.WHC.2.3.4 Explain how transportation routes stimulate growth of cities and the exchange of goods, knowledge, and technology.

Goal 2.4: Analyze the human and physical characteristics of different places and regions.

Objective(s): By the end of World History and Civilization, the student will be able to:

6-9.WHC.2.4.1 Explain the impact of waterways on civilizations.

Goal 2.5: Explain how geography enables people to comprehend the relationships between people, places, and environments over time.

Objective(s): By the end of World History and Civilization, the student will be able to:

6-9.WHC.2.5.1 Explain how the resources of an area can be the source of conflict between competing groups.
6-9.WHC.2.5.2 Illustrate how the population growth rate impacts a nation's resources.
6-9.WHC.2.5.3 Explain how rapid growth of cities can lead to economic, social, and political problems.
6-9.WHC.2.5.4 Describe how the conservation of resources is necessary to maintain a healthy environment.

Standard 3: Economics

Students in World History and Civilization explain basic economic concepts and identify different influences on economic systems.

Goal 3.1: Explain basic economic concepts.

Objective(s): By the end of World History and Civilization, the student will be able to:

6-9.WHC.3.1.1	Explain how ~~historically~~ people historically have relied on their natural resources to meet their needs.
6-9.WHC.3.1.2	List examples that show how economic opportunity and a higher standard of living are important factors in the migration of people.
6-9.WHC.3.1.3	Analyze the role of money as a means of exchange.
6-9.WHC.3.1.4	Describe alternative means of exchange.

Goal 3.2: Identify different influences on economic systems.

Objective(s): By the end of World History and Civilization, the student will be able to:

6-9.WHC.3.2.1	Analyze the impact of economic growth on ~~European~~ society.
6-9.WHC.3.2.2	Trace the evolution of hunting-gathering, agrarian, industrial, and technological economic systems.
6-9.WHC.3.2.3	Identify influential economic thinkers and the impact of their philosophies.
6-9.WHC.3.2.4	Identify important economic organizations that have influenced economic growth.

Goal 3.3: Analyze the different types of economic institutions.

No objectives in World History and Civilization

Goal 3.4: Explain the concepts of good personal finance.

No objectives in World History and Civilization

Standard 4: Civics and Government

Students in World History and Civilization build an understanding of the evolution of democracy.

Goal 4.1: Build an understanding of the foundational principles of the American political system.

No objectives in World History and Civilization

Goal 4.2: Build an understanding of the organization and formation of the American system of government.

No objectives in World History and Civilization

Goal 4.3: Build an understanding that all people in the United States have rights and assume responsibilities.

No objectives in World History and Civilization

Goal 4.4: Build an understanding of the evolution of democracy.

Objective(s): By the end of World History and Civilization, the student will be able to:

6-9.WHC.4.4.1 Describe the role of government in population movements throughout ~~western~~ civilization.

6-9.WHC.4.4.2 Analyze the various political influences which shaped ~~western~~ civilizations including the City-State, Monarchy, Republic, Nation-State, and Democracy.

6-9.WHC.4.4.3 Analyze and evaluate the global expansion of liberty and democracy through revolution and reform movements in challenging authoritarian or despotic regimes.

Goal 4.5: Build an understanding of comparative government.

No objectives in World History and Civilization

Standard 5: Global Perspectives

Students in World History and Civilization build an understanding of multiple perspectives and global interdependence.

Goal 5.1: Build an understanding of multiple perspectives and global interdependence.

Objective(s): By the end of World History and Civilization, the student will be able to:

6-9.WHC.5.1.1 Explain common reasons and consequences for the breakdown of order among nation-states, such as conflicts about national interests, ethnicity, and religion; competition for resources and territory; the absence of effective means to enforce international law.

6-9.WHC.5.1.2 Explain the global consequences of major conflicts in the 20th century, such as World War I; World War II, ~~including~~ and the Holocaust; and the Cold War.

6-9.WHC.5.1.3 Evaluate why peoples unite for political, economic, and humanitarian reasons.

IDAHO CONTENT STANDARDS
GRADE 6-12
U.S. HISTORY I

Students are expected to know content and apply skills from previous grades.

Standard 1: History

Students in U.S. History I build an understanding of the cultural and social development of the United States, trace the role of migration and immigration of people in the development of the United States, identify the sovereign status and role of American Indians in the development of the United States, analyze the political, social, and economic responses to industrialization and technological innovations in the development of the United States, and trace the role of exploration and expansion in the development of the United States.

Goal 1.1: Build an understanding of the cultural and social development of the United States.

Objective(s): By the end of U.S. History I, the student will be able to:

- 6-12.USH1.1.1.1 Compare and contrast early cultures and settlements that existed in North America prior to European contact.
- 6-12.USH1.1.1.~~1~~ 2 Compare and contrast the different cultural, religious, and social influences that emerged in the North American colonies.
- 6-12.USH1.1.1.~~2~~ 3 Describe the experiences of culturally, ethnically, and racially different groups existing as part of American society prior to the Civil War.
- 6-12.USH1.1.1.~~3~~ 4 Analyze the common traits, beliefs, and characteristics that unite the United States as a nation and a society.
- 6-12.USH1.1.1.~~4~~ 5 Discuss the causes and effects of various compromises and conflicts in American history, such as the American Revolution, Civil War and Reconstruction.
- ~~6-12.USH1.1.1.5 Compare and contrast early cultures and settlements that existed in North America prior to European contact.~~

Goal 1.2: Trace the role of migration and immigration of people in the development of the United States.

Objective(s): By the end of U.S. History I, the student will be able to:

- 6-12.USH1.1.2.1 Analyze the religious, political, and economic motives of ~~European~~ immigrants who came to North America.
- 6-12.USH1.1.2.2 Explain the motives for and the consequences ~~for~~ of slavery and other forms of involuntary immigration to North America.
- 6-12.USH1.1.2.3 Analyze the concept of Manifest Destiny and its impact on American Indians ~~and~~ in the development of the United States.

Goal 1.3: Identify the sovereign status and role of American Indians in the development of the United States.

Objective(s): By the end of U.S. History I, the student will be able to:

6-12.USH1.1.3.1 Trace federal policies and treaties such as removal, reservations, and allotment ~~throughout history~~ that have impacted ~~contemporary~~ American Indians historically and currently.

6-12.USH1.1.3.2 Explain how and why events may be interpreted differently according to the points of view of participants and observers.

6-12.USH1.1.3.3 ~~Discuss the resistance of American Indians to~~ Identify the impact termination practices such as removal policies, boarding schools, and forced assimilation had on American Indians.

Goal 1.4: Analyze the political, social, and economic responses to industrialization and technological innovations in the development of the United States.

Objective(s): By the end of U.S. History I, the student will be able to:

6-12.USH1.1.4.1 Explain the ~~consequences~~ effects of scientific and technological inventions and changes on the social and economic lives of the people in the development of the United States.

6-12.USH1.1.4.2 Explain how the development of various modes of transportation increased economic prosperity and promoted national unity.

Goal 1.5: Trace the role of exploration and expansion in the development of the United States.

Objective(s): By the end of U.S. History I, the student will be able to:

6-12.USH1.1.5.1 Examine the development of diverse cultures in what is now the United States.

6-12.USH1.1.5.2 Identify significant countries and their roles and motives in the European exploration of the Americas.

6-12.USH1.1.5.3 Describe and analyze the interactions between native peoples and the European explorers.

6-12.USH1.1.5.4 Summarize the major events in the European settlement of North America from Jamestown to the end of the 18th century.

6-12.USH1.1.5.5 Identify the United States territorial expansion between 1801 and 1861, and explain internal and external conflicts.

Goal 1.6: Explain the rise of human civilization.

No objectives in U.S. History I

Goal 1.7: Trace how natural resources and technological advances have shaped human civilization.

No objectives in U.S. History I

Goal 1.8: Build an understanding of the cultural and social development of human civilization.

No objectives in U.S. History I

Goal 1.9: Identify the role of religion in the development of human civilization.

No objectives in U.S. History I

Standard 2: Geography

Students in U.S. History I analyze the spatial organizations of people, places, and environment on the earth's surface, explain how human actions modify the physical environment and how physical systems affect human activity and living conditions, and trace the migration and settlement of human populations on the earth's surface.

Goal 2.1: Analyze the spatial organizations of people, places, and environment on the earth's surface.

Objective(s): By the end of U.S. History I, the student will be able to:

6-12.USH1.2.1.1 Develop and interpret different kinds of maps, globes, graphs, charts, databases and models.

Goal 2.2: Explain how human actions modify the physical environment and how physical systems affect human activity and living conditions.

Objective(s): By the end of U.S. History I, the student will be able to:

6-12.USH1.2.2.1 Analyze ways in which the physical environment affected political, social, and economic development.

Goal 2.3: Trace the migration and settlement of human populations on the earth's surface.

Objective(s): By the end of U.S. History I, the student will be able to:

6-12.USH1.2.3.1 Describe Pre-Columbian migration to the Americas.
6-12.USH1.2.3.2 Analyze the impact of the Columbian exchange.
6-12.USH1.2.3.~~2~~ 3 Illustrate westward migration across North America.

Goal 2.4: Analyze the human and physical characteristics of different places and regions.

No objectives in U.S. History I

Goal 2.5: Explain how geography enables people to comprehend the relationships between people, places, and environments over time.

No objectives in U.S. History I

Standard 3: Economics

Students in U.S. History I explain basic economic concepts, identify different influences on economic systems, ~~and~~ analyze the different types of economic institutions, and explain the concepts of personal finance.

Goal 3.1: Explain basic economic concepts.

Objective(s): By the end of U.S. History I, the student will be able to:

6-12.USH1.3.1.1 Describe the economic characteristics of mercantilism.

6-12.USH1.3.1.2 Compare the economic development of the North with the South.

Goal 3.2: Identify different influences on economic systems.

Objective(s): By the end of U.S. History I, the student will be able to:

6-12.USH1.3.2.1 Describe the emergence and evolution of a market economy.

6-12.USH1.3.2.2 Analyze the role of government policy in the early economic development of the United States.

Goal 3.3: Analyze the different types of economic institutions.

Objective(s): By the end of U.S. History I, the student will be able to:

6-12.USH1.3.3.1 Evaluate the role of financial institutions in the economic development of the United States.

Goal 3.4: Explain the concepts of ~~good~~ personal finance.

~~No objectives in U.S. History I~~

Objective(s): By the end of U.S. History I, the student will be able to:

6-12.USH1.3.4.1 Analyze how economic conditions affect personal finance.

Standard 4: Civics and Government

Students in U.S. History I build an understanding of the foundational principles of the American political system, the organization and formation of the American system of government, that all people in the United States have rights and assume responsibilities, and the evolution of democracy.

Goal 4.1: Build an understanding of the foundational principles of the American political system.

Objective(s): By the end of U.S. History I, the student will be able to:

6-12.USH1.4.1.1 Trace the development of our constitutional ~~democracy~~ republic ~~in the United States~~ ~~such as the Mayflower Compact,~~ through founding documents, colonial assemblies, ~~Bacon's Rebellion~~ and colonial rebellions.

6-12.USH1.4.1.2 Identify fundamental values and principles as expressed in basic documents, ~~such as~~ including the Declaration of Independence, Articles of Confederation, and the United States Constitution.

6-12.USH1.4.1.3 Evaluate issues in which fundamental values and principles are in conflict, such as between liberty and equality, individual interests and the common good, and majority rule and minority protections.

Goal 4.2: Build an understanding of the organization and formation of the American system of government.

Objective(s): By the end of U.S. History I, the student will be able to:

6-12.USH1.4.2.1 Explain how the executive, legislative, and judicial powers are distributed and shared among the three branches of national government.

6-12.USH1.4.2.2 Explain how and why powers are distributed and shared between national and state governments in a federal system.

Goal 4.3: Build an understanding that all people in the United States have rights and assume responsibilities.

Objective(s): By the end of U.S. History I, the student will be able to:

6-12.USH1.4.3.1 Provide and evaluate examples of social and political leadership in early American history.

6-12.USH1.4.3.2 Describe ways in which citizens participated in early American public life.

Goal 4.4: Build an understanding of the evolution of democracy.

Objective(s): By the end of U.S. History I, the student will be able to:

6-12.USH1.4.4.1 Describe the role of gender, race, ethnicity, religion, and national origin on the development of individual rights and political rights.

Goal 4.5: Build an understanding of comparative government.

No objectives in U.S. History I

Standard 5: Global Perspectives

Students in U.S. History I build an understanding of multiple perspectives and global interdependence.

Goal 5.1: Build an understanding of multiple perspectives and global interdependence.

Objective(s): By the end of U.S. History I, the student will be able to:

6-12.USH1.5.1.1 Explain the significance of principle policies and events in the United States' relations with the world, such as the War of 1812, Monroe Doctrine, and Mexican-American War and Spanish American War~~s~~.

6-12.USH1.5.1.2 Evaluate the major foreign policy positions that have characterized the United States' relations with the world, such as isolationism and imperialism.

6-12.USH1.5.1.3 Analyze how national interest shapes foreign policy.

IDAHO CONTENT STANDARDS
GRADE 9-12
U.S. HISTORY II

Students are expected to know content and apply skills from previous grades.

Standard 1: History

Students in U.S. History II build an understanding of the cultural and social development of the United States, trace the role of migration and immigration of people in the development of the United States, identify the sovereign status and role of American Indians in the development of the United States, analyze the political, social, and economic responses to industrialization and technological innovations in the development of the United States, and trace the role of exploration and expansion in the development of the United States.

Goal 1.1: Build an understanding of the cultural and social development of the United States.

Objective(s): By the end of U.S. History II, the student will be able to:

- 9-12.USH2.1.1.1 Analyze ways in which language, literature, the arts, traditions, beliefs, values, and behavior patterns of diverse cultures have enriched American society.
- ~~9-12.USH2.1.1.2 Discuss the causes and effects of various compromises and conflicts in American history.~~
- 9-12.USH2.1.1.~~3~~ 2 Analyze significant movements for social change.

Goal 1.2: Trace the role of migration and immigration of people in the development of the United States.

Objective(s): By the end of U.S. History II, the student will be able to:

- 9-12.USH2.1.2.1 Identify motives for continued immigration to the United States.
- 9-12.USH2.1.2.2 Identify the political and social resistance to immigration.
- 9-12.USH2.1.2.~~2~~ 3 Analyze the changes in the political, social, and economic conditions of immigrant groups.
- 9-12.USH2.1.2.~~3~~ 4 Discuss the causes and effects of 20^{th} century migration and settlement patterns.

Goal 1.3: Identify the sovereign status and role of American Indians in the development of the United States.

Objective(s): By the end of U.S. History II, the student will be able to:

- 9-12.USH2.1.3.1 Trace federal policies, such as Indian citizenship, Indian Reorganization Act, Termination, AIM, and self-determination ~~throughout history~~ ~~that~~ which have impacted ~~contemporary~~ American Indians historically and currently.

9-12.USH2.1.3.2 Discuss the ~~resistance~~ impact of forced assimilation on the land, cultural practices, and identity of American Indians. ~~to assimilation.~~

9-12.USH2.1.3.3 ~~Explain~~ Identify and discuss the influences of American Indians ~~to~~ on the history and culture of the United States.

Goal 1.4: Analyze the political, social, and economic responses to industrialization and technological innovations in the development of the United States.

Objective(s): By the end of U.S. History II, the student will be able to:

9-12.USH2.1.4.1 Explain the factors that contributed to the rise of industrialization in the 19^{th} century.

9-12.USH2.1.4.2 Describe the economic responses to industrialization and the emergence of the American labor movement.

9-12.USH2.1.4.3 Analyze the political and social responses to industrialization.

9-12.USH2.1.4.4 Identify and analyze the causes of the Great Depression and its effects upon American society.

9-12.USH2.1.4.5 ~~Account for and define~~ Examine the shift from the industrial society at the beginning of the 20th century to the technological society at the end of the 20th century.

Goal 1.5: Trace the role of exploration and expansion in the development of the United States.

Objective(s): By the end of U.S. History II, the student will be able to:

9-12.USH2.1.5.1 ~~Describe the factors that contributed to~~ Analyze the causes and effects of the expansion of the United States.

Goal 1.6: Explain the rise of human civilization.

No objectives in U.S. History II

Goal 1.7: Trace how natural resources and technological advances have shaped human civilization.

No objectives in U.S. History II

Goal 1.8: Build an understanding of the cultural and social development of human civilization.

No objectives in U.S. History II

Goal 1.9: Identify the role of religion in the development of human civilization.

No objectives in U.S. History II

Standard 2: Geography

Students in U.S. History II analyze the spatial organizations of people, places, and environment on the earth's surface, and explain how human actions modify the physical environment and how physical systems affect human activity and living conditions.

Goal 2.1: Analyze the spatial organizations of people, places, and environment on the earth's surface.

Objective(s): By the end of U.S. History II, the student will be able to:

9-12.USH2.2.1.1 Develop and interpret different kinds of maps, globes, graphs, charts, databases and models.

Goal 2.2: Explain how human actions modify the physical environment and how physical systems affect human activity and living conditions.

Objective(s): By the end of U.S. History II, the student will be able to:

9-12.USH2.2.2.1 Analyze ways in which the physical environment affected political, social, and economic development.

Goal 2.3: Trace the migration and settlement of human populations on the earth's surface.

No objectives in U.S. History II

Goal 2.4: Analyze the human and physical characteristics of different places and regions.

No objectives in U.S. History II

Goal 2.5: Explain how geography enables people to comprehend the relationships between people, places, and environments over time.

No objectives in U.S. History II

Standard 3: Economics

Students in U.S. History II explain basic economic concepts, identify different influences on economic systems, analyze the different types of economic institutions, and explain the concepts of ~~good~~ personal finance.

Goal 3.1: Explain basic economic concepts.

Objective(s): By the end of U.S. History II, the student will be able to:

9-12.USH2.3.1.1 Describe the emergence of the modern corporation.
9-12.USH2.3.1.2 Describe the development of a consumer economy.
9-12.USH2.3.1.3 Analyze the role of the modern United States in the global economy.

Goal 3.2: Identify different influences on economic systems.

Objective(s): By the end of U.S. History II, the student will be able to:

9-12.USH2.3.2.1 Analyze the role of government policy in the economic development of the modern United States.

Goal 3.3: Analyze the different types of economic institutions.

Objective(s): By the end of U.S. History II, the student will be able to:

9-12.USH2.3.3.1 Evaluate the role of financial institutions in the economic development of the United States.

Goal 3.4: Explain the concepts of ~~good~~ personal finance.

Objective(s): By the end of U.S. History II, the student will be able to:

9-12.USH2.3.4.1 Analyze how economic conditions affect personal finance.

Standard 4: Civics and Government

Students in U.S. History II build an understanding of the organization and formation of the American system of government, build an understanding that all people in the United States have rights and assume responsibilities, and build an understanding of the evolution of democracy.

Goal 4.1: Build an understanding of the foundational principles of the American political system.

No objectives in U.S. History II

Goal 4.2: Build an understanding of the organization and formation of the American system of government.

Objective(s): By the end of U.S. History II, the student will be able to:

9-12.USH2.4.2.1 Analyze the relationship between the three federal branches of government.

Goal 4.3: Build an understanding that all people in the United States have rights and assume responsibilities.

Objective(s): By the end of U.S. History II, the student will be able to:

9-12.USH2.4.3.1 Identify the impact of landmark United States Supreme Court cases, including *Plessy v. Ferguson* and *Brown v. Board of Education of Topeka*.

9-12.USH2.4.3.2 Provide and evaluate examples of social and political leadership in American history.

Goal 4.4: Build an understanding of the evolution of democracy.

Objective(s): By the end of U.S. History II, the student will be able to:

9-12.USH2.4.4.1 Trace the development and expansion of political, civil, and economic rights.

Goal 4.5: Build an understanding of comparative government.

No objectives in U.S. History II

Standard 5: Global Perspectives

Students in U.S. History II build an understanding of multiple perspectives and global interdependence.

Goal 5.1: Build an understanding of multiple perspectives and global interdependence.

Objective(s): By the end of U.S. History II, the student will be able to:

9-12.USH2.5.1.1 Compare competing belief systems of the 20th century, including capitalism, communism, imperialism, totalitarianism, isolationism, and internationalism.

9-12.USH2.5.1.2 Trace the major foreign policy positions that have characterized the United States' relations with the world in the 20th century.

9-12.USH2.5.1.3 Explain the significance of principal events in the United States' relations with the world, such as Spanish-American War, World Wars I and II, formation of the United Nations, Marshall Plan, NATO, Korean and Vietnam Wars, end of the Cold War, and interventions in Latin America and the Middle East.

9-12.USH2.5.1.4 Explain how and why the United States assumed the role of world leader after World War II and analyze its leadership role in the world today.

IDAHO CONTENT STANDARDS
GRADE 9-12
AMERICAN GOVERNMENT

Students are expected to know content and apply skills from previous grades.

Standard 1: History

Students in American Government build an understanding of the cultural and social development of the United States.

Goal 1.1: Build an understanding of the cultural and social development of the United States.

Objective(s): By the end of American Government, the student will be able to:

9-12.G.1.1.1 Describe historical milestones that led to the creation of limited government in the United States, such as the Declaration of Independence (1776), Articles of Confederation (1781), state constitutions and charters, United States Constitution (1787), and the Bill of Rights (1791).

9-12.G.1.1.2 Analyze important events and individuals responsible for bringing about political changes in the United States.

Goal 1.2: Trace the role of migration and immigration of people in the development of the United States.

No objectives in American Government

Goal 1.3: Identify the sovereign status and role of American Indians in the development of the United States.

No objectives in American Government

Goal 1.4: Analyze the political, social, and economic responses to industrialization and technological innovations in the development of the United States.

No objectives in American Government

Goal 1.5: Trace the role of exploration and expansion in the development of the United States.

No objectives in American Government

Goal 1.6: Explain the rise of human civilization.

No objectives in American Government

Goal 1.7: Trace how natural resources and technological advances have shaped human civilization.

No objectives in American Government

Goal 1.8: Build an understanding of the cultural and social development of human civilization.

No objectives in American Government

Goal 1.9: Identify the role of religion in the development of human civilization.

No objectives in American Government

Standard 2: Geography

Students in American Government explain how geography enables people to comprehend the relationships between people, places, and environments over time.

Goal 2.1: Analyze the spatial organizations of people, places, and environment on the earth's surface.

No objectives in American Government

Goal 2.2: Explain how human actions modify the physical environment and how physical systems affect human activity and living conditions.

No objectives in American Government

Goal 2.3: Trace the migration and settlement of human populations on the earth's surface.

No objectives in American Government

Goal 2.4: Analyze the human and physical characteristics of different places and regions.

No objectives in American Government

Goal 2.5: Explain how geography enables people to comprehend the relationships between people, places, and environments over time.

Objective(s): By the end of American Government, the student will be able to:

9-12.G.2.5.1 Analyze the impact of geography on the American political system, such as electoral politics and congressional redistricting.

Standard 3: Economics

Students in American Government identify different influences on economic systems.

Goal 3.1: Explain basic economic concepts.

No objectives in American Government

Goal 3.2: Identify different influences on economic systems.

Objective(s): By the end of American Government, the student will be able to:

9-12.G.3.2.1 Analyze the economic impact of government policy.

9-12.G.3.2.2 Compare and contrast different economic systems and relate each to the different forms of government.

Goal 3.3: Analyze the different types of economic institutions.

No objectives in American Government

Goal 3.4: Explain the concepts of ~~good~~ personal finance.

No objectives in American Government

Standard 4: Civics and Government

Students in American Government build an understanding of the foundational principles of the American political system, the organization and formation of the American system of government, that all people in the United States have rights and assume responsibilities, ~~and~~ the evolution of democracy, and an understanding of comparative government.

Goal 4.1: Build an understanding of the foundational principles of the American political system.

Objective(s): By the end of American Government, the student will be able to:

9-12.G.4.1.1 Describe the origins of constitutional law in western civilization, including the natural rights philosophy, Magna Carta (1215), common law, and the Bill of Rights (1689) in England.

9-12.G.4.1.2 Analyze the essential philosophies, ideals, and objectives of the ~~original~~ ~~organizing~~ foundational documents of the United States, including the Declaration of Independence, the Articles of Confederation, ~~and~~ the United States Constitution, Bill of Rights, and ~~Amendments~~ Federalist Papers.

9-12.G.4.1.3 Explain the central principles of the United States governmental system including a written constitution, popular sovereignty, limited government, separation of powers, checks and balances, majority rule with minority rights, judicial review, and federalism.

Goal 4.2: Build an understanding of the organization and formation of the American system of government.

Objective(s): By the end of American Government, the student will be able to:

9-12.G.4.2.1 Identify and describe the three branches of federal government, their powers, and responsibilities.

9-12.G.4.2.2 Explain the functions, powers, interactions, and relationships among federal, state, local, and tribal governments.

9-12.G.4.2.3 Analyze and explain sovereignty and the treaty/trust relationship the United States has with American Indian tribes with emphasis on Idaho, such as hunting and fishing rights, and land leasing.

9-12.G.4.2.4 ~~Analyze~~ Trace the development and role of political parties and other political organizations and their impact on the American system of government.

9-12.G.4.2.5 Analyze the role of other political organizations and their impact on the American system of government.

9-12.G.4.2.~~5~~ 6 Explain the electoral process at each level of government.

~~9-12.G.4.2.6 Compare different forms of government, such as presidential with parliamentary, unitary with federal, democracy with dictatorship.~~

9-12.G.4.2.7 Name key officials, both elected and appointed, in the legislative, executive, and judicial branches at the State and Federal levels.

9-12.G.4.2.8 Name the United States Senators and Congressional representatives from Idaho.

Goal 4.3: Build an understanding that all people in the United States have rights and assume responsibilities.

Objective(s): By the end of American Government, the student will be able to:

9-12.G.4.3.1 Explain the ways in which individuals become citizens and distinguish among obligations, responsibilities, and rights.

9-12.G.4.3.2 Explain the implications of dual citizenship with regard to American Indians.

9-12.G.4.3.3 Identify the ways in which citizens can participate in the political process at the local, state, and national level.

9-12.G.4.3.4 Analyze and evaluate decisions about rights of individuals in landmark cases of the United States Supreme Court. ~~including *Gideon v. Wainwright, Miranda v. Arizona*.~~

Goal 4.4: Build an understanding of the evolution of democracy.

Objective(s): By the end of American Government, the student will be able to:

9-12.G.4.4.1 Analyze the struggles for the extension of civil rights.

9-12.G.4.4.2 Analyze and evaluate states' rights disputes past and present.

9-12.G.4.4.3 Provide and evaluate examples of the role of leadership in the changing relationship among the branches of American government.

9-12.G.4.4.4 Discuss how the interpretation and application of the United States Constitution has evolved.

Goal 4.5: Build an understanding of comparative government.

~~No objectives in American Government~~

Objective(s): By the end of American Government, the student will be able to:

9-12.G.4.5.1 Compare and contrast different forms of government, such as presidential with parliamentary, unitary with federal, dictatorship with democracy.

Standard 5: Global Perspectives

Students in American Government build an understanding of multiple perspectives and global interdependence.

Goal 5.1: Build an understanding of multiple perspectives and global interdependence.

Objective(s): By the end of American Government, the student will be able to:

9-12.G.5.1.1 Discuss the mutual impact of ideas, issues, and policies among nations, including environmental, economic, and humanitarian.

9-12.G.5.1.2 Describe the characteristics of United States foreign policy and how it has been created and implemented over time.

9-12.G.5.1.3 Identify and evaluate the role of the United States in international organizations and agreements. ~~such as the United Nations, NAFTA, and humanitarian organizations.~~

IDAHO CONTENT STANDARDS
GRADE 9-12
ECONOMICS

Students are expected to know content and apply skills from previous grades.

Standard 1: **History**

Students in Economics analyze the political, social, and economic responses to industrialization and technological innovations in the development of the United States.

Goal 1.1: Build an understanding of the cultural and social development of the United States.

No objectives in Economics

Goal 1.2: Trace the role of migration and immigration of people in the development of the United States.

No objectives in Economics

Goal 1.3: Identify the sovereign status and role of American Indians in the development of the United States.

No objectives in Economics

Goal 1.4: Analyze the political, social, and economic responses to industrialization and technological innovations in the development of the United States.

Objective(s): By the end of Economics, the student will be able to:

9-12.E.1.4.1 Analyze the impact of events, such as wars, industrialization, and technological developments on the business cycle.

Goal 1.5: Trace the role of exploration and expansion in the development of the United States.

No objectives in Economics

Goal 1.6: Explain the rise of human civilization.

No objectives in Economics

Goal 1.7: Trace how natural resources and technological advances have shaped human civilization.

No objectives in Economics

Goal 1.8: Build an understanding of the cultural and social development of human civilization.

No objectives in Economics

Goal 1.9: Identify the role of religion in the development of human civilization.

No objectives in Economics

Standard 2: Geography

Students in Economics analyze the human and physical characteristics of different places and regions**.**

Goal 2.1: Analyze the spatial organizations of people, places, and environment on the earth's surface.

No objectives in Economics

Goal 2.2: Explain how human actions modify the physical environment and how physical systems affect human activity and living conditions.

No objectives in Economics

Goal 2.3: Trace the migration and settlement of human populations on the earth's surface.

No objectives in Economics

Goal 2.4: Analyze the human and physical characteristics of different places and regions.

Objective(s): By the end of Economics, the student will be able to:

9-12.E.2.4.1 Explain how the factors of production are distributed among geographic regions and how this influences economic growth.

Goal 2.5: Explain how geography enables people to comprehend the relationships between people, places, and environments over time.

No objectives in Economics

Standard 3: Economics

Students in Economics explain basic economic concepts, identify different influences on economic systems, analyze the different types of economic institutions, and explain the concepts of ~~good~~ personal finance.

Goal 3.1: Explain basic economic concepts.

Objective(s): By the end of Economics, the student will be able to:

9-12.E.3.1.1 ~~Define~~ Apply the concepts of supply and demand, ~~and~~ scarcity, and opportunity costs, and explain ~~its~~ their implications in decision making.
9-12.E.3.1.2 Identify ways in which the interaction of all buyers and sellers influences prices.
9-12.E.3.1.3 Identify how incentives determine what is produced and distributed in a competitive market system.
9-12.E.3.1.4 Describe the factors of production.
9-12.E.3.1.5 Create and interpret graphs that model economic concepts.
9-12.E.3.1.6 Explain the difference between monetary policy and fiscal policy and the role of the Federal Reserve.
9-12.E.3.1.7 Analyze the various parts of the business cycle and its effect on the economy.

Goal 3.2: **Identify different influences on economic systems.**

Objective(s): By the end of Economics, the student will be able to:
9-12.E.3.2.1 Compare and contrast the characteristics of different economic systems and economic philosophies.
9-12.E.3.2.2 Explain and illustrate the impact of economic policies and decisions made by governments, businesses, and individuals.
9-12.E.3.2.3 Explain the purposes of labor unions.

Goal 3.3: Analyze the different types of economic institutions.

Objective(s): By the end of Economics, the student will be able to:
9-12.E.3.3.1 Explain the characteristics of various types of business and market structures.
9-12.E.3.3.2 Describe the elements of entrepreneurship and successful businesses.
9-12.E.3.3.3 Identify the role of the financial markets and institutions.
~~9-12.E.3.3.4 Explain the purposes of labor unions.~~
~~9-12.E.3.3.5 Explain the difference between monetary policy and fiscal policy.~~
~~9-12.E.3.3.6 Analyze the various parts of the business cycle and its effect on the economy.~~

Goal 3.4: Explain the concepts of ~~good~~ personal finance.

Objective(s): By the end of Economics, the student will be able to:
9-12.E.3.4.1 Examine and apply the elements of responsible personal fiscal management, such as budgets, interest, investment, savings, credit, and debt.
9-12.E.3.4.2 Identify and evaluate sources and examples of consumers' responsibilities and rights.
9-12.E.3.4.3 Discuss the impact of taxation as applied to personal finances.

Standard 4: Civics and Government

Students in Economics build an understanding of the organization and formation of the American system of government.

Goal 4.1: Build an understanding of the foundational principles of the American political system.

No objectives in Economics

Goal 4.2: Build an understanding of the organization and formation of the American system of government.

Objective(s): By the end of Economics, the student will be able to:

- 9-12.E.4.2.1 Explain the basic functions of government in a mixed economic system.
- 9-12.E.4.2.2 Identify laws and policies adopted in the United States to regulate competition.
- 9-12.E.4.2.3 Examine the federal budget, debt, and deficit, and their implications on the economy.

Goal 4.3: Build an understanding that all people in the United States have rights and assume responsibilities.

No objectives in Economics

Goal 4.4: Build an understanding of the evolution of democracy.

No objectives in Economics

Goal 4.5: Build an understanding of comparative government.

No objectives in Economics

Standard 5: Global Perspectives

Students in Economics build an understanding of multiple perspectives and global interdependence.

Goal 5.1: Build an understanding of multiple perspectives and global interdependence.

Objective(s): By the end of Economics, the student will be able to:

- 9-12.E.5.1.1 Describe the involvement of the United States in international economic organizations and treaties, such as GATT, IMF, and the WTO.
- 9-12.E.5.1.2 Analyze global economic interdependence and competition.

9-12.E.5.1.3 Apply economic concepts to explain the role of imports/exports both nationally and internationally.

Idaho K-12 Content Standards for Computer Science

The Computer Science standards build upon frameworks developed by professional organizations, educators, and industry. In particular, they build upon the 2016 draft standards put out by CSTA (Computer Science Teachers Association). It is not an exhaustive list of everything in computer science that can be learned within a K-12 pathway, but instead outlines what it means to be literate in Computer Science. Curriculum developers are encouraged to create a learning experience that extends beyond the framework to encompass students' many interests, abilities, and aspirations. The framework reflects the latest research in CS education, including learning progressions, trajectories, and computational thinking.

The CSTA draft standards were created by several states (MD, CA, IN, IA, AR, UT, ID, NE, GA, WA, NC), large school districts (NYC, Chicago, San Francisco), technology companies (Microsoft, Google, Apple), organizations (Code.org, ACM, CSTA, ISTE, MassCAN, CSNYC), and individuals (university faculty, researchers, K-12 teachers, and administrators). They align with the K-12 CS Education Framework (https://k12cs.org) that is steered by 5 organizations: ACM (Association for Computing Machinery), CIC (Cyber Innovation Center), Code.org, CSTA, and NMSI (National Math+Science Initiative). The K-12 CS framework provides overarching, high-level guidance per grade bands, while the standards provide detailed student performance expectations at particular grade levels.

What is Computer Science?

Computer Science is an established discipline at the collegiate and post-graduate levels. It is best defined as "the scientific and engineering approach to computation, as well as its applications and impact. It is the systematic study of the feasibility, structure, expression, and mechanization of the methodical procedures (or algorithms) that underlie the acquisition, representation, processing, storage, communication of, and access to information." [1] We will use the following concepts and practices from the K-12 CS Education Framework to structure the standards.

The five *Core Computer Science concepts*:

1. Devices
2. Networks and Communication
3. Data and Analysis
4. Algorithms and Programming
5. Impact of Computing

The seven *Computational Thinking Framework Practices*:

1. Designing and Representing Computational Problems
2. Developing and using Abstractions
3. Creating Computational Artifacts
4. Testing and Iteratively Refining
5. Fostering an Inclusive Computing Culture
6. Communicating about Computing
7. Collaborating around Computing

Idaho K-12 Content Standards for Computer Science

International Society for Technology Education (ISTE Standards):

1. Creativity and Innovation
2. Communication and Collaboration
3. Research and Information Fluency
4. Critical Thinking, Problem Solving, and Decision Making
5. Digital Citizenship
6. Technology Operations and Concepts

Navigating the Idaho Content Standards for Computer Science

The Idaho Content Standards for Computer Science is a set of learning standards that provide a foundation for a comprehensive K-12 Computer Science curriculum. The standards are organized by grade bands (K-2, 3-5, K-5, 6-8, 9-10, 11-12 and 9-12) and the five Core Computer Science Concepts as referred to by the K-12 CS Education Framework (https://k12cs.org). It is intentional that some of the grade bands overlap. An item code is designated to facilitate the ease of locating and identifying specific standards based on the grade band (e.g. K-2), the abbreviated core concept (e.g. D-Devices), and the ordered number in the sequence (e.g. K-2.D.1). The seven Computational Thinking Framework Practices are included to frame the different standards. Also included is a column for the designation of ISTE (International Society for Technology Education) Standards as they align with the content standards for Computer Science.

The standards are not curriculum. Curriculum is determined by the local school districts. The standards clarify the learning outcomes of students. The standards inform teachers of what students should know, understand, and be able to do. Teachers can create “I can” statements with student friendly language from the standards. The examples listed within the standards are intended to be suggestions and provide clarification for teachers; they are not intended to be a menu, prescriptive, or all inclusive. While these standards set a foundation of learning statewide, local school districts in Idaho have the discretion to expand expectations of student learning beyond the state standards. Educators can use the standards in a variety of creative ways.

Once standards are introduced and mastered, they become prerequisites and are intended to be included in the curriculum at advanced grade levels. For example, the standard 6-8.D.04 (troubleshooting software and hardware) introduced in Grades 6-8 isn’t explicitly repeated at higher grades as the students will continue to practice the skills identified in this standard at higher grade levels. At the high school level, the learning objectives appropriate for all students at this level are included in *Grades 9-10*. Some students will opt for additional, more rigorous elective Computer Science courses in high school. The objectives appropriate for the subset of high school students focusing more deeply in Computer Science are listed in level *Grades 11-12*.

The standards written for grade bands K-2, 3-5, K-5, and 6-8, have been written with the intent that they can be incorporated into existing classes and subject areas relevant to each grade band and do not necessitate the creation of a specific Computer Science course to address the standards. However, this does not preclude local school districts from choosing to create specific Computer Science courses or units at these levels. At the high school level, we expect most local school districts will create standalone Computer Science courses. Two nationally recognized high school courses that are worth mentioning as models are *Exploring Computer Science* (http://www.exploringcs.org) and *AP Computer Science Principles* (http://apcsprinciples.org). These courses don’t cover all of the proposed high school standards but they can serve as model courses for local school districts to adapt to their unique environments.

Idaho K-12 Content Standards for Computer Science

	K-12 CS Standards - Devices (D) *The student will be able to:*	**Computational Thinking Framework Practice**	**ISTE Standard**
K-2.D.01	Locate and identify computing, input, and output devices in a variety of environments (e.g. desktop and laptop computers, tablets, mobile devices, monitors, keyboards, mouse, printers). (Grades K-2)	Communicating about Computing	Technology operations and concepts
K-2.D.02	Demonstrate how to operate a variety of computing devices (e.g. turn on, navigate, open/close programs or apps). (Grades K-2)	Communicating about Computing	Technology operations and concepts
K-2.D.03	Recognize that software is required to control all computing devices (e.g. programs, browsers, websites, apps). (Grades K-2)	Communicating about Computing	Technology operations and concepts
K-2.D.04	Identify, using accurate terminology, simple hardware and software problems and apply strategies for solving these problems (e.g. rebooting the device, checking the power, access to the network, read error messages, discuss problems with peers and adults). (Grades K-5)	Testing and Iteratively Refining	Critical thinking, problem solving and decision making ◦ Technology operations and concepts
3-5.D.01	Create code to model intelligent behavior in computing devices (e.g. CS unplugged activities, robot programming). (Grades 3-5)	Creating Computational Artifacts	Creativity and innovation
3-5.D.02	Identify, using accurate terminology, simple hardware and software problems and apply strategies for solving these problems (e.g. rebooting the device, checking the power, access to the network, read error messages, discuss problems with peers and adults). (Grades K-5)	Testing and Iteratively Refining	Critical thinking, problem solving and decision making ◦ Technology operations and concepts
6-8.D.01	Exemplify how computational devices impact the quality of life (both positively and negatively) and enhance the ability of people to perform work, communicate, and interact with others. (Grades 6-8)	Fostering an Inclusive Computing Culture	Communication and collaboration ◦ Digital citizenship
6-8.D.02	Compare and contrast the ways that humans and machines process instructions and sense the world. (Grades 6-8)	Developing and using Abstractions	Critical thinking, problem solving and decision making
6-8.D.03	Differentiate features of everyday objects that contain computing components (i.e., devices that collect, store, analyze, and/or transmit data) (e.g. Kinect, GoPro, smartphone, car). (Grades 6-8)	Developing and using Abstractions	Research and information fluency
6-8.D.04	Apply troubleshooting strategies for solving hardware and software problems (e.g. recognizing, describing, reproducing, isolating, fixing and retesting). (Grades 6-8)	Testing and Iteratively Refining	Creativity and innovation ◦ Critical thinking, problem solving, and decision making ◦ Technology operations and concepts

Idaho K-12 Content Standards for Computer Science

6-8.D.05	Compare and contrast the capabilities of different hardware and software in computer systems (e.g. processors, display types, input devices, communication, and storage capabilities). (Grades 6-8)	Communicating about Computing	Technology operations and concepts
9-10.D.01	Identify and evaluate what computing resources are required for a given purpose (e.g. system requirements needed to run a program, hardware, and software needed to run game X). (Grades 9-10)	Fostering an Inclusive Computing Culture	Creativity and innovation ◦ Research and information fluency ◦ Critical thinking, problem solving, and decision making ◦ Technology operations and concepts
9-10.D.02	Explore the unique features of embedded computers in areas such as mobile devices, sensors, and vehicles. (Grades 9-10)	Fostering an Inclusive Computing Culture	Creativity and innovation ◦ Research and information fluency ◦ Critical thinking, problem solving, and decision making ◦ Technology operations and concepts
9-10.D.03	Create or modify a program that uses different forms of input and output. (e.g. use voice input instead of text input, use text-to-speech for output) (Grades 9-10)	Creating Computational Artifacts	Creativity and innovation ◦ Research and information fluency ◦ Critical thinking, problem solving, and decision making ◦ Technology operations and concepts
9-10.D.04	Demonstrate the multiple levels of abstraction that support program execution including programming languages, translations, and low-level systems including the fetch-execute cycle (e.g. model, dance, create a play/presentation). (Grades 9-10)	Developing and using Abstractions	Creativity and innovation ◦ Communication and collaboration ◦ Critical thinking, problem solving, and decision making ◦ Technology operations and concepts
11-12.D.01	Identify and describe hardware (e.g. physical layers, logic gates, chips, components). (Grades 11-12)	Communicating about Computing	Critical thinking, problem solving and decision making ◦ Technology operations and concepts
11-12.D.02	Create a model of how embedded systems sense, process, and actuate in a given	Communicating about Computing	Critical thinking, problem solving

Idaho K-12 Content Standards for Computer Science

	environment (e.g. ocean, atmosphere, and highway) (Grades 11-12)		and decision making ◦ Technology operations and concepts

	K-12 CS Standards - Data and Analysis (DA) *The student will be able to:*	**Computational Thinking Framework Practice**	**ISTE Standard**
K-2.DA.01	Classify and sort information into useful order without using a computer (e.g. sorting objects by various attributes). (Grades K-2)	Fostering an Inclusive Computing Culture	Research and information fluency
K-2.DA.02	Demonstrate that computing devices save information as data that can be stored, searched, retrieved, modified, and deleted. (Grades K-2)	Developing and using Abstractions	Research and information fluency ◦ Technology operations and concepts
K-2.DA.03	Explain that networks, like the Internet, link people using computers and other computing devices allowing them to communicate, access, and share information. (Grades K-2)	Developing and using Abstractions	Communication and collaboration ◦ Technology operations and concepts
3-5.DA.01	Use outcome data (results) from running a simulation to solve a problem or answer a question in a core subject area, either individually or collaboratively. (Grades 3-5)	Designing and Representing Computational Problems	Communication and collaboration ◦ Critical thinking, problem solving and decision making
3-5.DA.02	Understand how computers encode and store data (e.g. simple mapping of binary number to decimal number, letter, or color). (Grades 3-5)	Developing and using Abstractions	Communication and collaboration ◦ Technology operations and concepts
3-5.DA.03	Gather, manipulate, and evaluate data to explore a real world problem that is of interest to the student. (Grades 3-5)	Designing and Representing Computational Problems	Research and information fluency ◦ Critical thinking, problem solving, and decision making
6-8.DA.01	Describe the trade-off between quality and file size of stored data (e.g. music, video, text, images). (Grades 6-8)	Communicating about Computing	Technology operations and concepts
6-8.DA.02	Defend the selection of the data, collection, and analysis needed to answer a question. (Grades 6-8)	Communicating about Computing	Communication and collaboration ◦ Research and information fluency ◦ Critical

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			thinking, problem solving, and decision making
6-8.DA.03	Understand that data collection is used to make recommendations to influence decisions as well as predict behavior. List the positive and negative impacts. (Grades 6-8)	Fostering an Inclusive Computing Culture	Research and information fluency ◦ Critical thinking, problem solving, and decision making
6-8.DA.04	Encode and decode information using encryption/decryption schemes. (e.g. Morse code, Unicode, binary, symbols, student-created codes, simple ciphers). (Grades 6-8)	Developing and using Abstractions	Technology operations and concepts
6-8.DA.05	Identify layers of abstraction in different contexts (e.g. video and animation are made of audio and video frames, which are made of pixels, which are made of color codes). (Grades 6-8)	Developing and using Abstractions	Critical thinking, problem solving, and decision making ◦ Technology operations and concepts
9-10.DA.01	Illustrate how various types of data are stored in a computer system (e.g. how sound and images are stored). (Grades 9-10)	Communicating about Computing	Communication and collaboration ◦ Critical thinking, problem solving, and decision making ◦ Technology operations and concepts
9-10.DA.02	Differentiate between information access and distribution rights (e.g. write, discuss). (Grades 9-10)	Communicating about Computing	Communication and collaboration ◦ Critical thinking, problem solving, and decision making ◦ Digital citizenship ◦ Technology operations and concepts
9-10.DA.03	Compare and contrast the viewpoints on cybersecurity from the perspective of security experts, privacy advocates, the government (e.g. persuasive essay, presentation, or debate). (Grades 9-12)	Fostering an Inclusive Computing Culture	Communication and collaboration ◦ Critical thinking, problem solving, and decision making ◦ Digital citizenship
9-10.DA.04	Explain the principles of security by examining encryption, cryptography, and authentication techniques. (Grades 9-12)	Designing and Representing Computational Problems	Critical thinking, problem solving, and decision making ◦ Digital citizenship

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9-10.DA.05	Apply basic techniques for locating, collecting, and understanding the quality of small and large-scale data sets (e.g. public data sets). (Grades 9-10)	Designing and Representing Computational Problems	Research and information fluency ◦ Technology operations and concepts
9-10.DA.06	Convert between binary, decimal, octal, and hexadecimal representations of data. (Grades 9-10)	Developing and using Abstractions	Research and information fluency ◦ Technology operations and concepts
9-10.DA.07	Analyze the representation and trade-offs among various forms of digital information (e.g. lossy versus lossless compression). (Grades 9-10)	Developing and using Abstractions	Research and information fluency ◦ Critical thinking, problem solving, and decision making ◦ Technology operations and concepts
9-10.DA.08	Analyze data and identify patterns through modeling and simulation.(Grades 9-12)	Developing and using Abstractions	Research and information fluency ◦ Critical thinking, problem solving, and decision making ◦ Technology operations and concepts
11-12.DA.01	Use data analysis to enhance understanding and gain knowledge of complex systems to show the transformation from data to information to knowledge (e.g. using existing data sets). (Grades 11-12)	Fostering an Inclusive Computing Culture	Research and information fluency ◦ Critical thinking, problem solving, and decision making ◦ Technology operations and concepts
11-12.DA.02	Use various data collection techniques for different types of problems (e.g. mobile device GPS, user surveys, embedded system sensors, open data sets, social media data sets). (Grades 11-12)	Fostering an Inclusive Computing Culture	Research and information fluency ◦ Critical thinking, problem solving, and decision making ◦ Technology operations and concepts
11-12.DA.03	Understand and explain security policies by comparing encryption and authentication strategies (e.g. trapdoor functions and man in the middle attacks). (Grades 11-12)	Designing and Representing Computational Problems	Creativity and innovation ◦ Research and information fluency ◦ Critical thinking, problem solving, and decision making

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			◦ Technology operations and concepts
11-12.DA.04	Discuss the variety of interpretations of binary sequences (e.g. instructions, numbers, text, sound, image). (Grades 11-12)	Developing and using Abstractions	Technology operations and concepts
11-12.DA.05	Use models and simulations to help formulate, refine, and test scientific hypotheses. (Grades 11-12)	Developing and using Abstractions	Research and information fluency ◦ Critical thinking, problem solving, and decision making ◦ Technology operations and concepts
11-12.DA.06	Analyze data and identify patterns through modeling and simulation.(Grades 9-12)	Developing and using Abstractions	Research and information fluency ◦ Critical thinking, problem solving, and decision making ◦ Technology operations and concepts

	K-12 CS Standards - Impact of Computing (IC) *The student will be able to:*	**Computational Thinking Framework Practice**	**ISTE Standard**
K-2.IC.01	Practice responsible digital citizenship (legal and ethical behaviors) in the use of technology systems and software. (Grades K-5)	Fostering an Inclusive Computing Culture	Digital citizenship
K-2.IC.02	Understand that a wide range of jobs require knowledge or use of computer science. (Grades K-2)	Fostering an Inclusive Computing Culture	Research and information fluency
3-5.IC.01	Practice responsible digital citizenship (legal and ethical behaviors) in the use of technology systems and software. (Grades K-5)	Fostering an Inclusive Computing Culture	Digital citizenship
3-5.IC.02	Explore the connections between computer science and other fields. (Grades 3-5)	Fostering an Inclusive Computing Culture	Research and information fluency ◦ Critical thinking, problem solving, and decision making
3-5.IC.03	Generate examples of how the use of computing can affect society and how society can	Fostering an Inclusive Computing	Communication and

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	influence the use of computing. (Grades 3-5)	Culture	collaboration
3-5.IC.04	Explain ethical issues that relate to computers and networks (e.g. equity of access, security, privacy, copyright, digital citizenship, and intellectual property). (Grades 3-5)	Fostering an Inclusive Computing Culture	Digital citizenship
3-5.IC.05	Evaluate the positive and negative impacts of computing devices in daily life. (e.g., downloading videos and audio files, electronic appliances, wireless Internet, mobile computing devices, GPS systems, Internet of Things, wearable computing). Describe the pros and cons of these impacts.(Grades 3-5)	Fostering an Inclusive Computing Culture	Digital citizenship
6-8.IC.01	Explore security risks associated with using weak passwords, lack of encryption and/or insecure transactions. (Grades 6-8)	Communicating about Computing	Critical thinking, problem solving, and decision making ◦ Digital citizenship ◦ Technology operations and concepts
6-8.IC.02	Explore how computer science fosters innovation and enhances other careers and disciplines. (Grades 6-8)	Communicating about Computing	Creativity and innovation ◦ Research and information fluency ◦ Technology operations and concepts
6-8.IC.03	Describe ethical issues that relate to computers and networks (e.g. equity of access, security, privacy, ownership and information sharing, copyright, licensing). (Grades 6-8)	Fostering an Inclusive Computing Culture	Creativity and innovation ◦ Research and information fluency ◦ Digital Citizenship ◦ Technology operations and concepts
6-8.IC.04	Explore how the Internet impacts global communication and collaboration. (Grades 6-8)	Fostering an Inclusive Computing Culture	Creativity and innovation ◦ Communication and collaboration
6-8.IC.05	Design, develop, and present computational artifacts that have a positive social impact (e.g. web pages, mobile applications, animations). (Grades 6-8)	Creating Computational Artifacts	Creativity and innovation ◦ Communication and collaboration ◦ Critical thinking, problem solving, and decision making
6-8.IC.06	Redesign user interfaces to be more inclusive, accessible, and minimizing the impact of the designer's inherent bias. (e.g. web pages, mobile applications, animations). (Grades 6-8)	Testing and Iteratively Refining	Creativity and innovation ◦ Communication and

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			collaboration ◦ Research and information fluency ◦ Critical thinking, problem solving, and decision making
6-8.IC.07	Understand and explain the elements of federal, state, and local regulations that relate to digital citizenship (e.g. COPPA, CIPA, state laws, district policies). (Grades 6-8)	Fostering an Inclusive Computing Culture	Digital citizenship
6-8.IC.08	Summarize current events and changes resulting from computing and their effects on education, the workplace, and society. (Grades 6-8)	Fostering an Inclusive Computing Culture	Creativity and innovation ◦ Research and information fluency ◦ Technology operations and concepts
6-8.IC.09	Predict positive and negative social impacts of existing or student created content and computational artifacts (e.g. economic, entertainment, education, or political). (Grades 6-8)	Collaborating around Computing	Critical thinking, problem solving, and decision making ◦ Digital citizenship ◦ Technology operations and concepts
9-10.IC.01	Explain the social and economic implications associated with unethical computing practices (e.g. software piracy, intrusion, malware, current corporate fraud examples). (Grades 9-10)	Collaborating around Computing	Critical thinking, problem solving, and decision making ◦ Digital citizenship ◦ Technology operations and concepts
9-10.IC.02	Discuss trade-offs such as privacy, safety, and convenience associated with the collection and large scale analysis of information about individuals (e.g. social media, online shopping, how grocery/dept stores collect and use personal data). (Grades 9-10)	Communicating about Computing	Communication and collaboration ◦ Research and information fluency ◦ Digital citizenship ◦ Technology operations and concepts
9-10.IC.03	Understand and explain the impact of artificial intelligence and robotics. (Grades 9-10)	Communicating about Computing	Critical thinking, problem solving, and decision making ◦ Technology operations and concepts
9-10.IC.04	Describe how computer science shares features with creating and designing an artifact such as in music and art. (Grades 9-12)	Communicating about Computing	Critical thinking, problem solving, and decision making ◦ Technology operations and

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			concepts
9-10.IC.05	Demonstrate how computing enhances traditional forms and enables new forms of experience, expression, communication, and collaboration (e.g. virtual reality). (Grades 9-10)	Fostering an Inclusive Computing Culture	Creativity and innovation ◦ Communication and collaboration ◦ Critical thinking, problem solving, and decision making ◦ Technology operations and concepts
9-10.IC.06	Explain the impact of the digital divide on access to critical information (e.g. education, healthcare, medical records, access to training). (Grades 9-10)	Fostering an Inclusive Computing Culture	Communication and collaboration ◦ Research and information fluency ◦ Critical thinking, problem solving, and decision making ◦ Digital citizenship
9-10.IC.07	Explain the impact of the digital divide on access to critical information (e.g. education, healthcare, medical records, access to training). (Grades 9-10)	Fostering an Inclusive Computing Culture	Communication and collaboration ◦ Research and information fluency ◦ Critical thinking, problem solving, and decision making ◦ Digital citizenship
9-10.IC.08	Compare the positive and negative impacts of computing on behavior and culture. (Grades 9-10)	Fostering an Inclusive Computing Culture	Communication and collaboration ◦ Research and information fluency ◦ Critical thinking, problem solving, and decision making ◦ Digital citizenship
9-10.IC.09	Evaluate a computational artifact for its effectiveness for universal access (e.g. compare sample code with accessibility standards, building in access from initial design). (Grades 9-10)	Testing and Iteratively Refining	Research and information fluency ◦ Critical thinking, problem solving, and decision making ◦ Technology operations and concepts
9-10.IC.10	Practice responsible digital citizenship (legal and ethical behaviors) in the use of technology	Fostering an Inclusive Computing	Digital citizenship

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	systems and software. (Grades 9-10)	Culture	
9-10.IC.11	Explain how computer science fosters innovation and enhances other careers and disciplines. (Grades 6-8)	Communicating about Computing	Communication and collaboration ◦ Research and information fluency ◦ Critical thinking, problem solving, and decision making ◦ Digital citizenship
9-10.IC.12	Explain the impact of computing on business, manufacturing, commerce, and society. (Grades 9-12)	Fostering an Inclusive Computing Culture	Communication and collaboration ◦ Research and information fluency ◦ Critical thinking, problem solving, and decision making ◦ Digital citizenship
11-12.IC.01	Understand the ecosystem of open source software development and its impact on global collaboration through an open-source software project (e.g. https://codein.withgoogle.com). (Grades 11-12)	Collaborating around Computing	Research and information fluency; Critical thinking, problem solving, and decision making; Digital citizenship; Technology operations and concepts
11-12.IC.02	Debate laws and regulations that impact the development and use of software. (e.g. compare and contrast licensing versus certification, professional societies, professional code of ethics). (Grades 11-12)	Communicating about Computing	Communication and collaboration ◦ Research and information fluency ◦ Critical thinking, problem solving, and decision making ◦ Digital citizenship ◦ Technology operations and concepts
11-12.IC.03	Research, analyze, and present how computational thinking has revolutionized an aspect of our culture (e.g. agriculture, communication, work, healthcare, music, art). (Grades 11-12)	Fostering an Inclusive Computing Culture	Creativity and innovation ◦ Research and information fluency ◦ Critical thinking, problem solving, and decision

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			making ◦ Digital citizenship ◦ Technology operations and concepts
11-12.IC.04	Analyze the role and impact of government regulation on privacy and security. (Grades 11-12)	Fostering an Inclusive Computing Culture	Research and information fluency ◦ Critical thinking, problem solving, and decision making ◦ Digital citizenship
11-12.IC.05	Debate how the issues of equity, access, and power relate to the distribution of computing resources in a global society. (Grades 11-12)	Fostering an Inclusive Computing Culture	Communication and collaboration ◦ Research and information fluency ◦ Critical thinking, problem solving, and decision making
11-12.IC.06	Identify and evaluate the beneficial and harmful effects of computing innovations. (Grades 11-12)	Developing and using Abstractions	Research and information fluency ◦ Critical thinking, problem solving, and decision making ◦ Digital citizenship
11-12.IC.07	Practice responsible digital citizenship (legal and ethical behaviors) in the use of technology systems and software. (Grades 11-12)	Fostering an Inclusive Computing Culture	Digital citizenship
11-12.IC.08	Describe how computer science shares features with creating and designing an artifact such as in music and art. (Grades 9-12)	Communicating about Computing	Critical thinking, problem solving, and decision making ◦ Technology operations and concepts
11-12.IC.09	Explain the impact of computing on business, manufacturing, commerce, and society. (Grades 9-12)	Fostering an Inclusive Computing Culture	Communication and collaboration ◦ Research and information fluency ◦ Critical thinking, problem solving, and decision making ◦ Digital citizenship
11-12.IC.10	Summarize how computer automation and control is transforming society and the global economy (e.g. financial markets, transactions, predictions). (Grades 11-12)	Fostering an Inclusive Computing Culture	Communication and collaboration ◦ Research and

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			information fluency ◦ Critical thinking, problem solving, and decision making ◦ Digital citizenship

	K-12 CS Standards - Networks and Communication (NC) *The student will be able to:*	Computational Thinking Framework Practice	ISTE Standard
3-5.NC.01	Demonstrate how a device on a network sends and receives information. (Grades 3-5)	Developing and using Abstractions	Technology operations and concepts
6-8.NC.01	Simulate the flow of information as packets on the Internet and networks (e.g. model using strings and paper, note passing). (Grades 6-8)	Communicating about Computing	Communication and collaboration ◦ Technology operations and concepts
6-8.NC.02	Compare and contrast the trade-offs between physical (wired), wireless, and mobile networks (e.g. speed, security, and cost). (Grades 6-8)	Communicating about Computing	Communication and collaboration ◦ Technology operations and concepts
9-10.NC.01	Describe the underlying process of Internet-based services. (e.g. illustrate how information flows in a global network, servers and clients, cloud services, secure versus insecure communication). (Grades 9-10)	Communicating about Computing	Communication and collaboration ◦ Research and information fluency ◦ Critical thinking, problem solving, and decision making ◦ Technology operations and concepts
9-10.NC.02	Illustrate the basic components of computer networks, protocols and routing (e.g. team based activities which may include drawing a diagram of a network including routers, switches, local networks, and end user devices, creating models with string and paper, see CS unplugged activities). (Grades 9-10)	Developing and using Abstractions	Communication and collaboration ◦ Research and information fluency ◦ Critical thinking, problem solving, and decision making ◦ Technology operations and concepts

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11-12.NC.01	Simulate and discuss the issues that impact network functionality (e.g. use ns3 or other free network simulators). (Grades 11-12)	Developing and using Abstractions	Creativity and innovation ◦ Research and information fluency ◦ Communication and collaboration ◦ Technology operations and concepts
11-12.NC.02	Examine how encryption is essential to ensuring privacy and security over the internet. (Grades 11-12)	Communicating about Computing	Communication and collaboration ◦ Research and information fluency ◦ Critical thinking, problem solving, and decision making ◦ Technology operations and concepts

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	K-12 CS Standards - Algorithms and Programming (AP) *The student will be able to:*	Computational Thinking Framework Practice	ISTE Standard
K-2.AP.01	Construct and test problem solutions using a block-based visual programming language, both independently and collaboratively (e.g. pair programming). (Grades K-5)	Creating Computational Artifacts	Creativity and innovation ◦ Critical thinking, problem solving, and decision making
K-2.AP.02	Create a design document to illustrate thoughts, ideas, and stories in a sequential manner (e.g., storyboard, mind map). (Grades K-2)	Designing and Representing Computational Problems	Creativity and innovation
K-2.AP.03	Construct an algorithm to accomplish a task, both independently and collaboratively. (Grades K-5)	Developing and using Abstractions	Creativity and innovation ◦ Critical thinking, problem solving and decision making ◦ Communication and collaboration
K-2.AP.04	Follow the sequencing in an algorithm. (Grades K-2)	Testing and Iteratively Refining	Critical thinking, problem solving and decision making
3-5.AP.01	Identify and understand ways that teamwork and collaboration can support problem solving and the software design cycle. (Grades 3-5)	Collaborating around Computing	Creativity and innovation ◦ Communication and collaboration ◦ Critical thinking, problem solving, and decision making
3-5.AP.02	Construct and test problem solutions using a block-based visual programming language, both independently and collaboratively (e.g. pair programming). (Grades K-5)	Creating Computational Artifacts	Creativity and innovation ◦ Critical thinking, problem solving, and decision making
3-5.AP.03	Generate a list of sub-problems to consider while addressing a larger problem. (Grades 3-5)	Designing and Representing Computational Problems	Critical thinking, problem solving, and decision making
3-5.AP.04	Understand that computer program design is an iterative process that includes the following steps: define the problem, generate ideas, build a program, test the program, improve the program. (Grades 3-5)	Designing and Representing Computational Problems	Creativity and innovation ◦ Research and information fluency ◦ Critical thinking,

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			problem solving and decision making ◦ Technology operations and concepts
3-5.AP.05	Understand, explain and debug the sequencing in an algorithm. (Grades 3-5)	Testing and Iteratively Refining	Critical thinking, problem solving and decision making
3-5.AP.06	Construct and test problem solutions using a block-based visual programming language, both independently and collaboratively (e.g. pair programming). (Grades K-5)	Creating Computational Artifacts	Creativity and innovation ◦ Critical thinking, problem solving, and decision making
3-5.AP.07	Construct an algorithm to accomplish a task, both independently and collaboratively. (Grades K-5)	Developing and using Abstractions	Creativity and innovation ◦ Critical thinking, problem solving and decision making ◦ Communication and collaboration
6-8.AP.01	Solicit, evaluate, and integrate peer feedback as appropriate to develop or refine a product. (Grades 6-8)	Collaborating around Computing	Communication and collaboration ◦ Critical thinking, problem solving, and decision making
6-8.AP.02	Compare different algorithms that may be used to solve the same problem by time and space efficiency. (Grades 6-8)	Communicating about Computing	Critical thinking, problem solving, and decision making ◦ Technology operations and concepts
6-8.AP.03	Interpret, modify, and analyze content-specific models used to run simulations (e.g. ecosystems, epidemics, spread of ideas) . (Grades 6-8)	Creating Computational Artifacts	Creativity and innovation ◦ Critical thinking, problem solving, and decision making ◦ Technology operations and concepts
6-8.AP.04	Apply an iterative design process (define the problem, generate ideas, build, test, and improve solutions) in problem solving, both individually and collaboratively. (Grades 6-8)	Creating Computational Artifacts	Creativity and innovation ◦ Communication and collaboration ◦ Research and information fluency ◦ Critical

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			thinking, problem solving, and decision making ◦ Technology operations and concepts
6-8.AP.05	Create, analyze, and modify control structures to create programming solutions. (Grades 6-8)	Creating Computational Artifacts	Creativity and innovation ◦ Communication and collaboration ◦ Research and information fluency ◦ Critical thinking, problem solving, and decision making ◦ Technology operations and concepts
6-8.AP.06	Predict the outcome of an algorithm and then step through it to verify your predictions. (Grades 6-8)	Creating Computational Artifacts	Communication and collaboration ◦ Critical thinking, problem solving, and decision making
6-8.AP.07	Decompose a problem into sub-problems and demonstrate how the parts can be synthesized to create a solution. (Grades 6-8)	Developing and using Abstractions	Communication and collaboration ◦ Critical thinking, problem solving, and decision making ◦ Technology operations and concepts
6-8.AP.08	Evaluate the correctness of a program by collecting and analyzing data generated from multiple runs of the program. (Grades 6-8)	Testing and Iteratively Refining	Communication and collaboration ◦ Critical thinking, problem solving, and decision making ◦ Technology operations and concepts
6-8.AP.09	Use debugging and testing to improve program quality. (Grades 6-8)	Testing and Iteratively Refining	Critical thinking, problem solving, and decision making ◦ Technology operations and concepts
9-10.AP.01	Design and develop a software artifact by leading, initiating, and participating in a team (e.g. pair programming, agile software development). (Grades 9-12)	Collaborating around Computing	Creativity and innovation ◦ Communication and collaboration ◦ Critical thinking,

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			problem solving, and decision making
9-10.AP.02	Demonstrate how diverse collaboration, both inside and outside of a team, impacts the design and development of software products (e.g. students show their own artifacts and demonstrate and reflect how diverse collaboration made a product better). (Grades 9-12)	Collaborating around Computing	Communication and collaboration ◦ Research and information fluency ◦ Critical thinking, problem solving, and decision making
9-10.AP.03	Compare a variety of programming languages available to solve problems and develop systems. (Grades 9-10)	Collaborating around Computing	Research and information fluency ◦ Critical thinking, problem solving, and decision making ◦ Technology operations and concepts
9-10.AP.04	Explore security issues that might lead to compromised computer programs (e.g. ambiguous function calls, lack of error checking of the input, buffer overflow, SQL injection attacks, denial of service attacks). (Grades 9-12)	Communicating about Computing	Research and information fluency ◦ Critical thinking, problem solving, and decision making ◦ Technology operations and concepts
9-10.AP.05	Classify and define the different types of software licenses in order to understand how to apply each one to a specific software example. (Grades 9-12)	Fostering an Inclusive Computing Culture	Research and information fluency ◦ Critical thinking, problem solving, and decision making ◦ Digital citizenship ◦ Technology operations and concepts
9-10.AP.06	Understand the notion of hierarchy and abstraction in high-level languages, translation, instruction sets, and logic circuits. (Grades 9-10)	Fostering an Inclusive Computing Culture	Research and information fluency ◦ Critical thinking, problem solving, and decision making ◦ Technology operations and concepts
9-10.AP.07	Explore issues surrounding mobile computing by creating a mobile computing application (e.g. App Inventor). (Grades 9-10)	Creating Computational Artifacts	Creativity and innovation ◦ Critical thinking, problem solving, and decision making ◦

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			Technology operations and concepts
9-10.AP.08	Create software solutions by applying analysis, design, implementation and testing techniques. (Grades 9-10)	Creating Computational Artifacts	Creativity and innovation ◦ Critical thinking, problem solving, and decision making ◦ Technology operations and concepts
9-10.AP.09	Demonstrate code reuse by creating programming solutions using APIs and libraries (e.g. using text to speech in App Inventor, using Twitter API). (Grades 9-10)	Creating Computational Artifacts	Creativity and innovation ◦ Critical thinking, problem solving, and decision making ◦ Technology operations and concepts
9-10.AP.10	Illustrate the flow of execution and output of a given program (e.g. flow and control diagrams). (Grades 9-10)	Creating Computational Artifacts	Critical thinking, problem solving, and decision making ◦ Technology operations and concepts
9-10.AP.11	Illustrate how mathematical and statistical functions, sets, and logic are used in computation. (Grades 9-10)	Creating Computational Artifacts	Research and information fluency ◦ Critical thinking, problem solving, and decision making
9-10.AP.12	Design algorithms using sequence, selection, iteration and recursion. (Grades 9-10)	Designing and Representing Computational Problems	Creativity and innovation ◦ Critical thinking, problem solving, and decision making
9-10.AP.13	Explain, represent, and understand natural phenomena using modeling and simulation (Grade 9-10).	Designing and Representing Computational Problems	Creativity and innovation ◦ Critical thinking, problem solving, and decision making
9-10.AP.14	Describe the concept of parallel processing as a strategy to solve large problems. (Grades 9-10)	Designing and Representing Computational Problems	Critical thinking, problem solving, and decision making ◦ Technology operations and concepts

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9-10.AP.15	Compare and evaluate software development processes used to solve problems (e.g. waterfall, agile). (Grades 9-10)	Designing and Representing Computational Problems	Critical thinking, problem solving, and decision making ◦ Technology operations and concepts
9-10.AP.16	Decompose a complex problem into simpler parts using predefined functions and parameters, classes, and methods. (Grades 9-10)	Developing and using Abstractions	Critical thinking, problem solving, and decision making
9-10.AP.17	Demonstrate the value of abstraction to manage problem complexity. (Grades 9- 10)	Developing and using Abstractions	Creativity and innovation ◦ Critical thinking, problem solving, and decision making ◦ Technology operations and concepts
9-10.AP.18	Evaluate and improve program quality using various debugging and testing methods and examine the difference between verification and validation. (Grades 9-12)	Testing and Iteratively Refining	Critical thinking, problem solving, and decision making ◦ Technology operations and concepts
9-10.AP.19	Evaluate programs written by others for readability and usability. (Grades 9-10)	Collaborating around Computing	Critical thinking, problem solving, and decision making ◦ Technology operations and concepts ◦ Communication and Collaboration
11-12.AP.01	Analyze the notion of intelligent behavior through programs that learn and adapt, play games, do image recognition, perform text analysis, and control the behavior of robots. (Grades 11-12)	Communicating about Computing	Creativity and innovation ◦ Research and information fluency ◦ Critical thinking, problem solving, and decision making ◦ Technology operations and concepts
11-12.AP.02	Create collaborative software projects using version control systems, Integrated Development Environments (IDEs), and collaborative tools. (Grades 11-12)	Collaborating around Computing	Critical thinking, problem solving, and decision making ◦ Technology operations and concepts ◦ Communication and collaboration

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11-12.AP.03	Demonstrate an understanding of the software life cycle process (e.g. by participating on a software project team). (Grades 11-12)	Collaborating around Computing	Critical thinking, problem solving, and decision making ◦ Technology operations and concepts ◦ Communication and collaboration
11-12.AP.04	Modify an existing program to add additional functionality and discus the positive and negative implications (e.g., breaking other functionality). (Grades 11-12)	Communicating about Computing	Critical thinking, problem solving, and decision making ◦ Technology operations and concepts
11-12.AP.05	Explain the value of heuristic algorithms to approximate solutions for intractable problems. (Grades 11-12)	Designing and Representing Computational Problems	Critical thinking, problem solving, and decision making ◦ Technology operations and concepts
11-12.AP.06	Decompose a computational problem through data abstraction and modularity. (Grades 9-12)	Designing and Representing Computational Problems	Critical thinking, problem solving, and decision making ◦ Technology operations and concepts
11-12.AP.07	Critically examine algorithms and design an original algorithm (e.g. adapt, remix, improve). (Grades 11-12)	Developing and using Abstractions	Critical thinking, problem solving, and decision making ◦ Technology operations and concepts
11-12.AP.08	Evaluate efficiency, correctness, and clarity of algorithms. (Grades 11-12)	Developing and using Abstractions	Critical thinking, problem solving, and decision making ◦ Technology operations and concepts
11-12.AP.09	Compare and contrast simple data structures and their uses (e.g. arrays, lists, stacks, queues, maps, trees, graphs). (Grades 11-12)	Developing and using Abstractions	Critical thinking, problem solving, and decision making ◦ Technology operations and concepts
11-12.AP.10	Decompose a problem by creating functions and classes. (Grades 11-12)	Developing and using Abstractions	Critical thinking, problem

Idaho K-12 Content Standards for Computer Science

			solving, and decision making ◦ Technology operations and concepts
11-12.AP.11	Use variable scope and encapsulation to design programs with cohesive and decoupled components. (Grades 9-12)	Designing and Representing Computational Problems	Critical thinking, problem solving, and decision making ◦ Technology operations and concepts
11-12.AP.12	Classify problems as tractable, intractable, or computationally unsolvable. (Grades 11-12)	Developing and using Abstractions	Critical thinking, problem solving, and decision making ◦ Technology operations and concepts
11-12.AP.13	Understand and explain the use of concurrency (e.g. separate processes into threads and divide data into parallel streams, have students self sort by height). (Grades 11-12)	Designing and Representing Computational Problems	Critical thinking, problem solving, and decision making ◦ Technology operations and concepts
11-12.AP.14	Evaluate the qualities of a program such as correctness, usability, readability, efficiency, portability and scalability through a process such as a code review. (Grades 11-12)	Testing and Iteratively Refining	Communication and collaboration ◦ Critical thinking, problem solving, and decision making ◦ Technology operations and concepts

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Idaho K-12 Content Computer Science Standards White Paper

This white paper is a companion to the "Idaho K-12 Computer Science Standards." This document provides motivation and rationale for the standards and describes their development process. This document also adds transparency for the standards development process by providing historical reference and rationale for the content of the standards. It is intended to provide context and guidance for the standards usage.

What is Computer Science?

Computer Science is an established discipline at the collegiate and post-graduate levels. It is best defined as "the study of computers and algorithmic processes, including principles, their hardware and software designs, their applications, and their impact on society." The foundational concepts of Computer Science permeates all work and play in the digital world that we live in. Although its name contains the word *science*, Computer Science is usually considered to be a branch of engineering. This is in sharp contrast to most of the physical sciences, which separate the understanding and advancement of the science from its practical applications. Science is a technique for learning about the natural world by applying the principles of the *scientific method* (which includes making empirical observations, proposing hypotheses to explain those observations, and then testing those hypotheses); engineering is the application of science.

Computers are virtually indispensable to the field of computer science. Yet, as Edsger Dijkstra, a pioneering computer scientist, so aptly put it, "Computer science is no more about computers than astronomy is about telescopes." Some of the major subspecialties of computer science are algorithms and data structures, programming methodology and languages, software engineering, computer architecture, operating systems, database systems, distributed systems, networks and communications, parallel computing, human-computer interaction, artificial intelligence, computer graphics.

The Idaho K-12 Computer Science standards are organized by grade bands (K-2, 3-5, K-5, 6-8, 9-10, 11-12 and 9-12) and the five Core Computer Science Concepts as referred to by the CSTA (Computer Science Teachers Association). The seven Computational Thinking Framework Practices (CSTA) are included to frame the different standards. Also included is a column for the designation of ISTE (International

Society for Technology Education) Standards as they align with the content standards for Computer Science.

The 5 Core Computer Science concepts:

1. Devices
2. Networks and Communication
3. Data and Analysis
4. Algorithms and Programming
5. Impact of Computing

The 7 Computational Thinking practices:

1. Recognizing and Representing Computational Problems
2. Developing and using Abstractions
3. Creating Computational Artifacts
4. Testing and Iteratively Refining
5. Fostering an Inclusive Computing Culture
6. Communicating about Computing
7. Collaborating around Computing

International Society for Technology Education (ISTE Standards):

1. Creativity and Innovation
2. Communication and Collaboration
3. Research and Information Fluency
4. Critical Thinking, Problem Solving, and Decision Making
5. Digital Citizenship
6. Technology Operations and Concepts

The Purpose of the Standards

Computer Science is a field of study that will help to prepare students for future college and career goals. There are many jobs that require the understanding of Computer Science concepts and skills, however, all Idahoans can benefit from the computational thinking that is incorporated into these standards. The development of the Computer Science standards will move the students from being consumers of technology to being able to understand and create new technologies of the future.

The standards prioritize, clarify, and build upon frameworks developed by professional organizations, educators, and industry. It is not an exhaustive list of everything in Computer Science that can be learned within a K-12 pathway but instead describes what it means to be *literate* in Computer Science.

The standards are not curriculum. Curriculum is determined by the LEA (Local Education Agency). The standards clarify the learning outcomes of students. The standards inform teachers of what students should know, understand, or be able to do. Teachers can create "I can" statements with student friendly language from the standards. These are the minimum standards for Computer Science education. The LEA may include additional standards when writing curriculum depending on course offerings and the needs of students. Educators can use the standards in a variety of creative ways.

Current Status of Computer Science in Idaho

Idaho's current state of Computer Science is unstructured, disjointed, and uneven. As a result of not having a cohesive set of Idaho Computer Science Standards, teachers grasp from various resources and standards, which may not align across the state. This causes a lack of parity and equality for Idaho's students, as well as their access to Computer Science education. Having a uniform set of Computer Science standards will provide continuity of K-12 Computer Science education offerings throughout the state. Benefits will continue through higher education, and ultimately industry, business, and commerce of Idaho as more competent and well-educated graduates fulfill positions throughout the state.

According to the Conference Board (used by the Idaho Department of Labor), there are currently around 1300 unfilled open jobs in the state of Idaho for computer science related professions, many of which can be attributed to a lack of qualified candidates. Not only is this challenging for potential employers, but also affects our state revenues in potential taxes with salaries averaging around $70,000. For the benefit of our citizens, students' education, as well as the future of computer science and the technology industry in our state, creating these standards is an important step.

The Standards Creation Process

The standards were built on a progression of skills that can be accomplished using a variety of tools and in some cases limited access. Several existing Computer Science and related standards from CSTA (Computer Science Teachers Association), ISTE (International Society for Technology in Education), Florida Department of Education, Idaho CTE Programming Standards, Teacher Preparation Standards for Initial Certification in Computer Science, and Idaho Core Standards were reviewed and considered.

The working group chose the CSTA 2016 Computer Science draft standards as the starting point for the following reasons:

- The working group felt that the CSTA draft standards were the best match for Idaho.
- They were the most up to date standards with input from a variety of educators, industry, and professional organizations.
- The CSTA draft standards were created by the following participants:
    - Several states (MD, CA, IN, IA, AR, UT, ID, NE, GA, WA, NC)
    - Large school districts (NYC, Chicago, San Francisco)
    - Technology companies (Microsoft, Google, Apple)
    - Organizations (Code.org, ACM, CSTA, ISTE, MassCAN, CSNYC), and individuals (higher ed faculty, researchers, K-12 teachers, and administrators)
    - Idaho representation within the CSTA group

The working group evaluated and adapted the 2016 draft of the CSTA K-12 CS Standards with consideration of the following:

- Is the standard appropriate for Idaho?
- Is the standard appropriate for the given grade level?
- Is the standard measureable?
- Are there areas that we want to add that are not covered in the standards?
- Does the standard need an example for clarification?
- What needs to be removed, rewritten, or repositioned?
- Do the standards parallel what occurs in disciplines such as science, mathematics, and language arts?

The working group customized the CTA standards for Idaho using the above questions as a guide. This was done over four days of intense face to face discussion as well as offline email exchanges. The working group made several improvements and changes in the draft CSTA standards. These modification were also submitted back to the CSTA for incorporation into the national standards.

Once the a draft of the proposed standards was ready, a survey was sent to individuals in industry, elementary, secondary and postsecondary educators, and other interested parties to solicit input. The working group received over fifty surveys. The working group assessed and modified the standards based on the feedback.

Supporting Resources and References

CSTA K-12 CS Standards (2016)
ISTE Standards
https://labor.idaho.gov/publications/software-occupations-in-demand.pdf

The K-12 Idaho Computer Science Standards Working Group

Scott Cook, Director of Academic Services, Idaho SDE (**Facilitator**)
Tim Andersen, Computer Science Faculty, Boise State University
Todd Bigelow, Sr. Manager (Product Engineering), ON Semiconductors
Chris Conant, Morley Nelson Elementary School, Boise School District
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Robert Schreiber, Physics and Computer Science Teacher, Treasure Valley Math & Science Center
Frederick T. Sheldon, Computer Science Faculty, University of Idaho
Justin Touchstone, Program Manager, Engineering and Technology Ed., Idaho Division of Career and Technical Education

SUBJECT

Temporary and Proposed Rule — IDAPA 08.02.03.106, .117, Rules Governing Thoroughness, Advanced Opportunities

REFERENCE

August 2010	Board approved temporary and proposed rule to add a new section for the Mastery Advancement Pilot Program at IDAPA 08.02.03.117.
August 2011	Board approved temporary and proposed rule to add language to the advanced opportunities requirement and dual credit provisions of 08.02.03.106, Rules Governing Thoroughness, Advanced Opportunities.
November 2011	Board approved pending rule adding language to IDAPA 08.02.03.106 clarifying that students participating in the Dual Credit for Early Completers program need not complete their senior project prior to being eligible for participation.
August 2015	Board approved proposed rule amending the definition of Advanced Opportunities in IDAPA 08.02.03.007 to bring it into alignment with Board Policy III.Y. and the Advanced Opportunities the institutions were authorized to offer.
November 2015	Board approved pending rules changes to the Advanced Opportunities definition in IDAPA 08.02.02.007.

APPLICABLE STATUTE, RULE, OR POLICY

Section 33-4602, Idaho Code
IDAPA 08.02.03.106, .117 -- Rules Governing Thoroughness, Advanced Opportunities

BACKGROUND/DISCUSSION

This temporary and proposed rule will address changes made to the Advanced Opportunities funded by the state authorized in Section 33-1602, Idaho Code. Separate sections of the rule previously authorized separate programs known as the “8 in 6” Program and the Mastery Advancement Program. The new provisions in Section 33-4602, Idaho Code merge some of the opportunities from these programs with the program known as the Fast Forward Program. The temporary and proposed rule changes repeals the section of rule specific to the Mastery Advancement Pilot Program and adds provisions and clarity to the Advanced Opportunities section on the administration of the new Early Graduation Scholarship.

This rule language was vetted in the negotiated rulemaking process in which the State Department of Education conducted six (6) meetings throughout the state in April 2016. Additionally, feedback from stakeholders took place during program trainings in formal and informal settings, as well as suggestions via email. Overall, there were no concerns about the content or changes.

IMPACT

There should be no fiscal impact due to this rule above and beyond that which the legislation supports. The impact of this rule will provide detailed guidance for the administrative nuances of Advanced Opportunities funded by the State of Idaho.

ATTACHMENTS

STAFF COMMENTS AND RECOMMENDATIONS

The proposed amendments repeals the section of Administrative Code outlining the requirements for the Mastery Advancement Program. The enabling legislation creating the Mastery Advancement Program was repealed during the 2016 legislative session, while the provisions allowing for an early graduation scholarship were retained as part of a new program that expands the "Fast Forward" program. The new program provides state funding, up to $4,125 per student in grades 7 through 12, for use toward overload courses, dual credits, college credit-bearing examinations and professional certificate examinations, within specified limits. In addition to this amount students who graduate at least one year early are also eligible for an Advanced Opportunities scholarship to any Idaho public postsecondary institution in an amount equal to thirty-five percent (35%) of the statewide average daily attendance driven funding per enrolled student for each year that the student graduated early.

Proposed rules have a 21 day comment period prior to returning to the Board for consideration as a pending rule. Based on received comments and Board direction, changes may be made to proposed rules prior to entering the pending stage. All pending rules will be brought back to the Board for approval prior to submittal to the Department of Administration for publication in the Idaho Administrative Rules Bulletin. Pending rules are then forwarded to the legislature for consideration. Pending rules become effective at the end of the legislative session in which they are submitted unless rejected by the legislature.

Temporary rules go into effect at the time of Board approval unless an alternative effective date is specified by Board action. To qualify as a temporary rule, the rule must meet one of three criteria: provides protection of public health, safety, or welfare; or is to come into compliance with deadlines in amendments to governing law or federal programs; or is conferring a benefit. This rule qualifies as temporary rules as it brings the state in compliance with HB 458a (2016) and Section 33-4602, Idaho code.

BOARD ACTION

I move to approve the Temporary and Proposed Rule amendment to IDAPA 08.02.03.106 and 08.02.03.117, Rules Governing Thoroughness, for Advanced Opportunities, as submitted in Attachment 1.

Moved by ___________ Seconded by ___________ Carried Yes _____ No _____

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IDAPA 08
TITLE 02
CHAPTER 03

08.02.03 - RULES GOVERNING THOROUGHNESS

106. ADVANCED OPPORTUNITIES ~~(EFFECTIVE JULY 1, 2008).~~

01. Advanced Opportunities Requirement. All high schools in Idaho shall be required to provide Advanced Opportunities, as defined in Subsection 007~~.01~~, or provide opportunities for students to take courses at the postsecondary campus. ~~(3-29-12)~~(   )

~~**02. Dual Credit**. A student participating in the Dual Credit for Early Completers program (33-1626, Idaho Code) need not have completed a senior project prior to being eligible. However, a student must still complete a senior project by the end of grade twelve (12) or the student's final year of high school. (3-29-12)~~

02. Advanced Opportunities Early Graduation Scholarship Funding (Effective July 1, 2016). (   )

a. Scholarship Calculation. (   )

i. The statewide average daily attendance-driven funding per enrolled pupil shall be calculated by adding the previous fiscal year's statewide distributions for salary-based apportionment, benefit apportionment and discretionary funds, and dividing the total by the previous year's statewide public school enrollment for all grades. (   )

ii. The statewide average daily attendance-driven funding per enrolled pupil shall be recalculated each fiscal year. (   )

iii. All benefits paid for scholarships and to public schools shall be based on the statewide average daily attendance-driven funding per enrolled pupil figure for the fiscal year in which the benefit is paid. (   )

b. Payments to Idaho Colleges and Universities. (   )

i. Annual scholarship payments will be made in one installment during the first semester in which the student is enrolled, regardless of the number of years early the student graduated. Proof of enrollment in an Idaho public college or university must be obtained before any scholarship payment is made. (   )

ii. The State Department of Education will be responsible for making payments to the Idaho public colleges and universities attended by eligible students. The payments must be made no later than August 30 for the fall semester and January 30 for the spring semester. (   )

c. Payments to Public Schools. (   )

i. Public schools shall report to the State Department of Education, no later than June 15 of each school year, students who have graduated early. (   )

ii. The State Department of Education will make a single annual payment to public schools no later than October 1 of each year for all early graduates who are not attending the public school that school year as a result of early graduation. (   )

(BREAK IN CONTINUITY OF SECTIONS)

117. ~~MASTER ADVANCEMENT PILOT PROGRAM (MAPP).~~ (RESERVED)

~~**01. Definitions**. The following definitions apply only to Section 117 of these rules. (4-7-11)~~

~~**a.** Challenge Exam. A test that is rigorous and covers the full depth and breadth of knowledge of a specific course. A challenge exam is more difficult than an End of Course exam which typically is counted only for a portion of a student's final grade and covers only a sampling of the course content. (4-7-11)~~

~~**b.** Elementary. School grades K-6 (4-7-11)~~

~~**c.** Local Education Agency (LEA). A school district or a charter school that operates independently of any district and reports to the Idaho Public Charter School Commission. (4-7-11)~~

~~**d.** Secondary. School grades 7-12 (4-7-11)~~

~~**f.** Alternate pathways. An alternate method for a student to receive a high school diploma early. The methods may include but are not limited to: portfolios, accelerated classes, online and independent study. (4-7-11)~~

~~**02. LEA Participation**. (4-7-11)~~

~~**a.** LEAs must apply for the MAPP program no later than September 2010. LEAs will not be allowed to participate in the program after the initial sign up period. (4-7-11)~~

~~**b.** LEAs may request from the State Department of Education in writing of the intent to opt out of the program during the six (6) year pilot. (4-7-11)~~

~~**c.** The State Department of Education will create and review LEA application submissions. (4-7-11)~~

~~**d.** LEAs may choose to include all or as few as one (1) school within the district. (4-7-11)~~

~~**e.** LEAs may participate in the secondary pilot or the elementary pilot or both. (4-7-11)~~

~~**f.** LEAs must include in the application a plan for public involvement and parental notification of the program (4-7-11)~~

~~**03. Secondary Pilot Program**. (4-7-11)~~

~~**a.** To be eligible for the secondary pilot program LEAs must meet the following criteria: (4-7-11)~~

~~i. LEAs will provide a detailed plan for implementing the program. This plan will include at a minimum: a process for students to request a Challenge Exam, review of the exam scores and providing advice on course or grade advancement. (4-7-11)~~

~~ii. Participating districts shall use and apply the "Standards for Educational and Psychological Testing" (AERA, 1999) if creating district challenge exams. (4-7-11)~~

~~iii. LEAs may choose to incorporate scores from national standardized test approved by the State Department of Education. The State Department of Education shall create and make public a list of approved tests. (4-7-11)~~

~~**b.** The State Department of Education, in cooperation with the vendors of the national standardized tests, will provide a list recommending the course of mastery and the standard (score) at which students would be successful in the next course. (4-7-11)~~

~~**c.** LEAs may require students to reimburse the LEA for any of the assessments administered. Costs could include the standardized test fee or the administration costs incurred by the district. Requests for reimbursement may not exceed the actual costs incurred by the district. (4-7-11)~~

~~**d.** LEAs may provide alternate pathways to students for early graduation. (4-7-11)~~

~~**04. Elementary Pilot Program**. (4-7-11)~~

~~**a.** To be eligible for the elementary pilot program LEAs must meet the following criteria: (4-7-11)~~

~~i. Elementary school participation in MAPP allows for schools to use measures other than assessments. LEAs must submit a plan including how students will be measured and advanced either to the next grade or class. (4-7-11)~~

~~ii. The State Department of Education will review the plans and provide direction or suggestions. (4-7-11)~~

~~iii. The State Department of Education will provide information on two research-based advancement programs for elementary schools as suggested models. LEAs may submit a plan that is different from the suggested models. (4-7-11)~~

~~**b.** LEAs may require students to reimburse the LEA for any of the assessments administered. Costs could include the standardized test fee or the administration costs incurred by the district. Requests for reimbursement may not exceed the actual costs incurred by the district. (4-7-11)~~

~~**05. Reporting**. LEAs are required to submit to the State Department of Education, no later than June 10, the following data for all schools within the district regardless of whether the school is a site for MAPP: (4-7-11)~~

~~**a.** Comprehensive list of all students who participated in MAPP, including the students who graduated early and the number of years that each student graduated early. (4-7-11)~~

~~**b.** Detailed information on the performance of participating students on Challenge Exams or other measures used. (4-7-11)~~

~~**c.** The number of requests for Challenge Exams or advancement and the requests granted. (4-7-11)~~

~~**d.** School and District disciplinary and/or behavioral incidents. (4-7-11)~~

~~**e.** School and District graduation and dropout rates. (4-7-11)~~

~~**f.** Number of students in each school and for the LEA participating in advanced placement concurrent enrollment, or college courses while still students in the LEA. (4-7-11)~~

~~**06. Early Graduation Eligibility**. (4-7-11)~~

~~**a.** Students must have attended an Idaho public school for four full school years, as defined in IDAPA 08.02.01, "Rules Governing Administration, State Board of Education Rules, Subsection 250.01, immediately prior to graduation to be eligible for a Mastery Scholarship. (4-7-11)~~

~~**b.** Students must have completed all LEA and State graduation requirements within eleven (11) full school years or nine thousand nine hundred (9,900) hours to be eligible for a one (1) year mastery scholarship, within ten (10) full school years or eight thousand nine hundred ten (8,910) hours to be eligible for a two (2) year mastery scholarship or within nine (9) full school years or seven thousand nine hundred twenty (7,920) hours to be eligible for a three (3) year mastery scholarship. (4-7-11)~~

~~**c.** Students must attend an Idaho public college or university for the entirety of the scholarship period~~

~~in order to receive the scholarship payment. (4-7-11)~~

~~**d.** Students are eligible for a maximum of three (3) years of mastery scholarship. (4-7-11)~~

~~**e.** Students must enroll at an Idaho public college or university immediately within two (2) years following early graduation in order to receive scholarship funds. (4-7-11)~~

~~**07. ADA and Scholarship Funding**. (4-7-11)~~

~~**a.** Guidelines; (4-7-11)~~

~~i. The statewide average daily attendance-driven funding per enrolled pupil shall be calculated by adding the previous fiscal year's statewide distributions for salary-based apportionment, benefit apportionment and discretionary funds, and dividing the total by the previous year's statewide public school enrollment for all grades. (4-7-11)~~

~~ii. The statewide average daily attendance-driven funding per enrolled pupil shall be re-calculated each fiscal year. (4-7-11)~~

~~iii. All benefits paid for scholarships and to LEAs shall be based on the statewide average daily attendance-driven funding per enrolled pupil figure for the fiscal year in which the benefit is paid. (4-7-11)~~

~~**b.** Payments to Idaho Colleges and Universities. (4-7-11)~~

~~i. Annual scholarship payments will be made in two (2) equal installments, one (1) each at the beginning of each semester. (4-7-11)~~

~~ii. Proof of enrollment in an Idaho public college or university must be obtained before any scholarship payments are made. This proof must be obtained for each semester in which scholarship payments are made. (4-7-11)~~

~~iii. Students may apply to the State Department of Education to receive a multi-year scholarship over fewer years if the student will graduate from an Idaho public college or university in less than the number of scholarship years. (4-7-11)~~

~~iv. The State Department of Education will be responsible for making payments to the Idaho public colleges and universities attended by eligible students. The payments must be made no later than August 15 for the first semester and January 15 for the second semester. (4-7-11)~~

~~**c.** Payments to LEAs (4-7-11)~~

~~i. The State Department of Education will make a single annual payment to eligible LEAs by no later than October 1 of each year for all early graduates who are not attending the LEA that school year as a result of early graduation. (4-7-11)~~

~~ii. Payments will not be made to LEAs who fail to meet the reporting requirements. (4-7-11)~~