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SUBJECT

Identify operational efficiencies between the Office of the State Board of Education (OSBE) and the State Department of Education (SDE)

APPLICABLE STATUTE, RULE, OR POLICY

Idaho Constitution, Article IX, Section 2
Idaho Code §§ 33-101, 105, 114, 115, 116, 118, 120, 125 and 126
Idaho Code § 67-1504

BACKGROUND/DISCUSSION

At the request of the State Superintendent, the State Board of Education (Board) will undertake a review of major activities and initiatives in which OSBE and the State Department of Education (SDE) both have some involvement or interaction in the form of time and resources; and discuss which agency is best suited to take the lead on each respective activity.

IMPACT

Intended outcomes include the following:

- eliminate duplication of effort and overlap in projects and coordination in those areas where each agency have complementary roles;
- increase communication and role clarity between agencies; and
- increase efficiency of project completion.

ATTACHMENTS

STAFF COMMENTS

The Board of Education and Department of Education are often referred to interchangeably by educators and policymakers alike. Yet, by law the two entities have distinct roles and responsibilities. The purpose of the work session is to delineate which entity will take lead on identified activities set forth in Attachment 1 which are currently performed to some extent by staff from both entities.

BOARD ACTION

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

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Major Activities and Initiatives Performed by OSBE and SDE

Activity	Status	Lead Staff/Agency
Administrative Rules	Administrative rules are promulgated under the authority of the State Board of Education, rules are brought forward to the Board for consideration from SDE and OSBE SDE staff highlighted rules related to assessment and graduation requirements.	Tracie Bent, OSBE Amy Roche, SDE (coordinates rules developed by SDE staff) Karlynn Laraway, SDE
Charter Schools	The SDE and potential authorizers (school district or Public Charter School Commission) review new charter petitions in accordance with statutory requirements. These reviews occur at different stages and for different purposes. The SDE review is quantitative and addresses legal sufficiency, while the authorizer review is qualitative and determines whether or not the petitioners should be entrusted with taxpayer funds and public school students. The two reviews complement each other and are designed to help both authorizers and the petitioners succeed. PCSC and the SDE receive and review charter schools' fiscal audits.	Tamara Baysinger, OSBE Michelle Clement Taylor, SDE
College & Career Readiness	LEAs submit their College and Career Advising and Mentoring plans to OSBE. LEAs also report the effectiveness of their college and career advising programs as part of their annual continuous improvement plans also submitted to OSBE. Multiple instances of training and guidance are being provided (statewide conferences, regional trainings, local workshops). These activities are conducted with a high degree of interagency collaboration (SDE, SBOE, Labor, IDLA). SDE staff is also assisting with the review and compilation of college advising /	Byron Yankey, OSBE Tracie Bent, OSBE Matt McCarter, SDE

	career mentoring plans submitted by schools. The SDE provides one-on-one support to LEAs in this area. Additionally, SBOE promulgation of rules impacting SDE activity and LEA requirements is occurring. OSBE staff review the submitted plans and work with LEAs to help them update their plans to meet all of the statutory requirements set by the legislature as well as those requirements set in Administrative Code. As part of this review, LEA's are also provided with technical assistance and suggested best practices for improving their plans. OSBE provided templates to LEA's that could be used for the submittal of plans, including budgets. The templates were based on the administrative rule requirements and were not mandatory.	
College Entrance Exam	Need clarity in roles related to implementation of statewide contract, LEA training, collection and use of data, etc.	Karlynn Laraway, SDE
Data Dashboards	SBOE has requested more regular and purposeful discussion about salient K-20 metrics including institutional metrics and data points in the form of a dashboard. Concurrently, the proposed accountability framework includes indicators which would be presented in a data dashboard. There has been some conversation between OSBE and SDE staff about coordinating the data dashboards.	Carson Howell, OSBE Chris Campbell, SDE Alison Henken and Carson Howell, OSBE Tim McMurtrey and Duncan Robb, SDE
Direct Admissions	OSBE managed the program. SDE provides the student list and GPAs.	Carson Howell, OSBE Chris Campbell, SDE
Dual Credit Workgroup	The Dual Credit Workgroup recommendations are complete and will be presented to the Board for approval in December by SBOE staff.	Randall Brumfield and Dana Kelly, OSBE Tina Polishchuk, SDE

	Data is being compiled/ analyzed on an ongoing basis to ascertain GEM alignment, student access and dual credit contribution to postsecondary program completion. The Advanced Opportunities program is the primary funding source for students taking dual credit and is influenced by SBOE efforts in this arena. The SDE manages Fast Forward student accounts and tracks the appropriation. The SDE provides one on one support to LEAs in this area. Additionally, the promulgation of rules impacting SDE activity and LEA requirements is occurring.	
Educator Effectiveness	Clarification is needed on the roles and responsibilities of the SDE Educator Effectiveness work and the OSBE Educator Effectiveness position.	Christina Linder, OSBE Karen J.M. Seay, SDE
Federal Reporting	While we have unique roles in the process, completing Consolidated State Performance Report (CSPR) involves a number of OSBE and SDE staff. SBOE, as the SEA, has to certify and submit the CSPR to U.S. Dept. of Ed on deadline. While there have been challenges in the past in getting accurate and timely data for submittal, we have improved our communication and workflow on this project.	Alison Henken, OSBE Assessment, Federal Programs and IT staff, SDE
Graduation Requirements / Alternate Routes to Graduation	The Board promulgates the Administrative Rules establishing graduation requirements and the use (when necessary) of alternate routes to graduation. Currently, both OSBE staff and SDE staff answer questions from LEAs about graduation requirements and use of alternate routes. OSBE receives and reviews the Alternate Route Plans from LEAs.	Tracie Bent and Alison Henken, OSBE Assessment & Curriculum staff, SDE
GEAR UP Scholarship	The GEAR UP scholarship is managed by OSBE and is communicated to LEA grant recipients by SDE staff. The	Joy Miller, OSBE CD Breshears, SDE

	GEAR UP grant is being managed by SDE staff.	
Indian Education Committee	The Indian Education Committee is Board committee staffed by both SDE and OSBE. Annual assessment of progress on SBOE Indian Education Strategic Plan. Development of Idaho Essential Understandings regarding Idaho's five tribes and the significance of culturally responsive teaching Efforts underway to craft Indian Education curriculum framework. Inclusion of culturally relevant curriculum in Idaho Content Standards. Collaboration on Direct Admissions, Data Collection, Opportunity and Scholarship as they relate to tribal students.	Randall Brumfield and Patty Sanchez, OSBE Johanna Jones, SDE
K-12 Accountability	There is overlap and sometimes a lack of clarity in regards to the Accountability Oversight Committee's role and tasks and those of the SDE. Some work is done by OSBE staff, some by the AOC, and some work is done by SDE staff. The AOC is a Board Committee with staff support from OSBE. The Committee is charged with making recommendations to the Board regarding the statewide assessment system and K-12 accountability. Clarification is needed on the roles and responsibilities of the SDE Title I Accountability work and the OSBE Accountability position.	Alison Henken, OSBE Pete Koehler, SDE Karen J.M. Seay, SDE
Literacy Committee	The Literacy Committee is composed of one Board member (Debbie Critchfield), one OSBE staff, two SDE staff, one legislator (Rep. VanOrden),	Alison Henken, OSBE

	and a variety of educators. The committee was developed as a subcommittee of the Governor's Task Force and is charged with making recommendations on the literacy related Task Force recommendation. The Committee has made recommendations regarding changes that should happen to improve literacy outcomes. Most recently, based on the work of the Early Literacy Assessment Working Group, they recommended the state release a RFP to identify a new assessment to be used as the IRI. The SDE is overseeing the RFP process.	
Literacy Intervention	OSBE receives and reviews Literacy Intervention Plans from the LEAs. SDE manages the funding. SDE receives annual IRI data, but Literacy Interventions Plans also include a section where LEAs provide data and set benchmarks for future performance. Literacy Plan/IRI: The literacy plans were submitted to the SBOE and reviewed by their staff, however the SDE receives questions regarding data collection (IRI Results), form templates, expenditures, budgets, funding distribution, etc. related to the plans and associated allocations for intervention funding. The SDE distributes the funds, based on IRI results. If the SDE were to receive questions regarding programmatic implementation, best practices, intervention strategies – we would need to review the plans to offer support/resources or direct districts to the Board. OSBE staff review the submitted plans and work with LEAs to help them update their plans to meet all of the statutory requirements set by the	Alison Henken, OSBE Diane Roberts, SDE Karlynn Laraway, SDE

	legislature as well as those requirements set in Administrative Code. As part of this review, LEA's are also provided with technical assistance and suggested best practices for improving their plans. OSBE provided templates to LEA's that could be used for the submittal of plans, including budgets. The templates were based on the administrative rule requirements and were not mandatory.	
Math Work Group	The Math Work Group is chaired by Dave Hill. The group includes OSBE staff, SDE staff, higher education representatives, and others. The group is looking at math achievement and ways that math outcomes can be improved. Statewide convening, followed by regional summits were held to calibrate postsecondary math pathways and scale up the wider use of co-requisite remediation. Currently working on the following: (1) Idaho Mathematics Framework: SDE and Regional Math Center Personnel (2) K-2 Math Screener & Diagnostic Pilot: SDE & District Personnel Future Work – Planning in Progress: (3) ISAT Case Studies: SDE Staff and Districts – inclusion of OSBE staff if desired (4) Statewide Math Instructional Coach & Teacher Lead Collaborative: SDE, district, regional math center and other stakeholders (If Legislature approves funding request) Survey of stakeholders regarding middle school credit system and math credit requirements	Randall Brumfield, Alison Henken and Cathleen McHugh, OSBE Nicole Hall, SDE
Open Educational Resources	**Biology Project**: This project is in its infancy. Working jointly with SDE and Cassidy Hall of the UI Doceo Center,	Randal Brumfield, OSBE Scott Cook, Director Academic Services, SDE

	the plan is to assemble a workgroup of high school and college biology faculty to develop a suite of OERs for use in Introductory Biology dual credit courses (for non-majors). Under discussion: a platform for sharing OER statewide; writing a strategic plan. Underway: reviewing high quality OER via established curricular review process K12 and placing on adoption guide.	
Professional Standards Commission Standards & Endorsement Review	The Professional Standards Commission is authorized to conduct ethics violations and make recommendations to SBOE on improvements to teacher preparations standards and programs. Currently reviewing and revision the standards and endorsement language (20% each year per IDAPA rule): • Administrator • Bilingual/ENL • Idaho Core Teaching • Career Technical Education • World Language • Speech & Language Pathologist • Possible Addition of Dance • Any other revisions due to PSC work	Christina Linder, OSBE Lisa Colón Durham, SDE
School Improvement (K-12)	LEAs are responsible for ensuring that schools identified for improvement complete improvement plans (based on a comprehensive needs assessment) that meet ESSA requirements. There is confusion in the districts between school improvement plans required by the ISDE and the continuous improvement plans (formerly called strategic plans) required by statute. Who at the Board reads the continuous improvement plans? What purpose do they serve? Does the Board approve these? Ideally, LEAs would complete one plan that meets requirements for both entities.	Tracie Bent, OSBE Karen J.M. Seay, SDE

	Statutorily continuous improvement plans are submitted to OSBE. OSBE staff review the submitted plans and work with LEAs to help them update their plans to meet all of the statutory requirements set by the legislature as well as those requirements set in Administrative Code. As part of this review, LEA's are also provided with technical assistance and suggested best practices for improving their plans. OSBE provided templates to LEA's that could be used for the submittal of plans, including budgets. The templates were based on the administrative rule requirements and were not mandatory.	
Single College Application	OSBE has engaged IDLA to develop for Direct Admissions students a single online application to the eight public postsecondary institutions. SDE is pulling the data that will populate data fields from the students' records to be sent to the institutions.	Carson Howell, OSBE Chris Campbell, SDE
Smarter Balanced Assessment Consortium	Because of Idaho's unique governance structure, the Consortium has approved for Idaho to have two K-12 leads. In cases where there is a vote of the consortium states, the two leads have communicated with each other to reach a consensus. OSBE also is responsible for the Consortium Higher Education Lead.	Alison Henken, OSBE Karlynn Laraway, SDE Randal Brumfield, OSBE
STEM	OSBE and SDE staff and the STEM Action Center all work on STEM initiatives and it is not always clear who is or should be doing what. The Board has a STEM Education Strategic Plan, OSBE focusses on STEM higher education issues and K-20 STEM policy issues. SDE implements specific STEM training and programs.	Christina Linder, OSBE Scott Hill, SDE
Teacher Certification/Effectiveness	SDE pulls the data, OSBE analyzes and reports the data. SBOE is responsible for submitting the Federal Title II	Cathleen McHugh and Christina Linder, OSBE Lisa Colon, SDE

	(Higher Education Act Title II) report. This report includes information reported from each approved teacher preparation program and state certification data. The state certification data is collected from SDE. SDE manages the certification application process.	
Teacher Preparation	SBOE is responsible for approval of all teacher preparation programs (public and private), setting minimum standards and assessing the effectiveness of programs. OSBE staff meet regularly with teacher preparations program staff to discuss reporting and accountability issues as well as areas of potential improvement. Currently the PSC makes recommendations on teacher preparation standards as well as program approval.	Christina Linder, OSBE Academic Affairs Staff (public academic program approval)
Title II work	It doesn't look like there is currently a Title II-A (ESEA/ESSA) position at OSBE, but there has been one in the past. Clarification is needed on the difference between any K-12 Title II-A activities conducted by OSBE and the role and responsibilities for the SDE Title II-A coordinator.	Karen J.M. Seay, SDE Christina Linder, OSBE

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SUBJECT

Idaho State Board of Education 2018-2022 K-20 Strategic Plan

REFERENCE

December 2012	Board reviewed and requested amendments to the 2013-2017 State Board of Education Strategic Plan
February 2012	Board approved 2013-2017 State Board of Education K-20 Statewide Strategic Plan
December 2013	Board reviewed and discussed changes to the State Board of Education K-20 Statewide Strategic Plan
February 2014	Board reviewed and approved the updated 2014-2018 State Board of Education K-20 Statewide Strategic Plan
February 2015	Board reviewed and approved amended 2015-2019 (FY16-FY20) State Board of Education K-20 Statewide Strategic Plan
December 2015	Board approved 2016-2020 (FY17-FY21) Idaho State Board of Education Strategic Plan
August 2016	Board discussed higher education operational plan.

APPLICABLE STATUTE, RULE, OR POLICY

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

BACKGROUND/ DISCUSSION

The Board's strategic plan is used to define the vision and mission of Idaho's K-20 educational system; to guide future growth and development, and establish priorities for resource distribution. Strategic planning provides a mechanism for continual review to ensure excellence in education throughout the state. The strategic plan not only defines the Board's purpose, but establishes realistic goals and objectives that are consistent with its governing ideals, and communicates those goals and objectives to the agencies and institutions under the Board, the public, and other stakeholder groups.

Pursuant to the Board's master planning calendar, the Board is scheduled to review and approve its strategic plan annually in December, with the option of a final approval at the February Board meeting if significant changes are requested during the December Board meeting. Once approved the institutions and agencies then use the Board's strategic plan to inform their annual updates to their own strategic plans. The agencies and institutions bring their strategic plans forward for approval in April of each year with an option for final approval in June.

The update of the strategic plan during the February 2015 Board meeting included a comprehensive update to the plan on the recommendations of a committee appointed by the institution presidents and lead by Board staff. At the October 2016 Regular Board meeting, the Board reviewed performance measures. This performance measure review is a backward look at progress made during the

previous year in alignment with the strategic plan approved by the Board at the February 2015 Board meeting.

In addition to the Board's K-20 Education strategic plan, the Board has developed a number of area specific strategic plans as well as the Complete College Idaho plan, the Complete College Idaho plan includes statewide strategies that have been developed to move the Board's strategic plan forward with a focus on moving the needle on the 60% benchmark for the college completion performance measure (Percent of Idahoans (ages 25-34) who have a college degree or certificate requiring one academic year or more of study). The Indian Education strategic plan, STEM Education strategic plan, and Higher Education Research strategic plan, approved by the Board, are all required to be in alignment with the Board's overall K-20 Strategic Plan.

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." During the August 2016 Board meeting the Board provided feedback requesting a brief summary of each activity be included in the document. The attached Operation Plan incorporates those descriptions.

IMPACT

Once approved, the institutions and agencies will align their strategic plans to the Board's strategic plan and bring them forward to the Board for consideration in April.

The Board and staff use the strategic plan to prioritize statewide education initiatives in Idaho as well as the work of the Board staff. By focusing on critical priorities, Board staff, institutions, and agencies can direct limited resources to maximum effect.

ATTACHMENTS

STAFF COMMENTS AND RECOMMENDATIONS

The amendments proposed during this review cycle focus on updates to the performance measures benchmarks that were reached during the previous year or we are close to meeting. Board staff will walk the Board through the various

performance measures and discuss the proposed benchmarks. Discussion during the Work Session will focus on progress made toward meeting the Board's goals and whether or not there should be additional amendments made to the plan during this cycle.

The performance measure data has been incorporated into the strategic plan to make it easier to identify the progress that has been made and to help facilitate the discussion. In addition to the strategic plan with performance measure data, the annual reports on the Opportunity Scholarship and Duel Credit participation are include, should any Board member want more detailed information on efforts in these areas. This is the third year the Board office has produced the dual credit report, which focuses on the impact of students taking dual credit courses. The Opportunity Scholarship Review is our second look at the impact of the Opportunity Scholarship since the consolidation of the state managed scholarships in 2014. The 2015-2016 school year is the first year of full. The Board is required to report on the scholarships effectiveness each year to the legislature. The more detailed information is provided to the Board to help inform the progress of these specific focus areas of the Board and provide a more complete picture of the landscape that impacts the progress towards meeting the Board's goals.

In additional to the overall strategic plan discussion the Board will also have the opportunity to discuss the discrete activities and initiatives identified in the Operation Plan and prioritize activities. The Operational Plan document will serve as the basis for discussions with a stakeholder group. The stakeholder group will formulate recommendation on the Operational Plan for the Board's consideration at a future date.

Amendments to plan may be made during the work session, should the Board have no additional amendments following the work session, the Strategic Plan may be approved at this meeting.

BOARD ACTION

I move to approve the 2018-2022 (FY19-FY23) Idaho State Board of Education K-20 Education Strategic Plan as submitted in Attachment 1.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

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Idaho State Board of Education

FY2018-2022
Strategic Plan

An Idaho Education: High Potential – High Achievement

VISION

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

MISSION

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

AUTHORITY AND SCOPE:

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

State Board of Education Governed Agencies and Institutions:

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

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: 10,000, $16M [1, 2]

2013	2014	2015	2016	Benchmark
8,225	7,864	1,787	1,798	10,000
$6,671,809	$6,187,700	$6,369,276	$6,528,700	16,000,000

- Proportion of graduates with debt.
  Benchmark: 50% or less [4]

2013	2014	2015	2016	Benchmark
68.1%	71.3%			<50%

  Benchmark: 85% graduating student debt of peers [3, 4]

2013	2014	2015	2016	Benchmark
108.5%	109.1%			85%

  Benchmark: 10% reduction of average default rate in 5 years (3yr default rate 4yr/2yr institutions) [1, 4]

2013	2014	2015	2016	Benchmark
8.4%				10% reduction
20.9%				10% reduction

- Percentage of Idaho High School graduates meeting college placement/entrance exam college readiness benchmarks.
  Benchmark: SAT – 60% [5]
  ACT – 60% [5]

2013	2014	2015	2016	Benchmark
	25.7%	25.2%	33.0%	60%
32.0%	34.0%	37.0%	36.8%	60%

- Percent of high school students enrolled and number of credits earned in Dual Credit and Advanced Placement (AP):
  - Dual credit
    Benchmark: 30% students per year [1, 4]

2013	2014	2015	2016	Benchmark
18.4%	20.3%	23.9%	27.7%	30%

    Benchmark: 180,000 credits per year [1, 4]

2013	2014	2015	2016	Benchmark
62,248	68,950	87,684	95,337	180,000

  - Technical Competency Credit
    Benchmark: 27% students per year enrolled [1, 4]

2013	2014	2015	2016	Benchmark
24.2%	20.0%	17.6%		27%

  - Advanced Placement (AP) exams taken each year.
    Benchmark: 10% students per year [1, 4]

2013	2014	2015	2016	Benchmark
9.0%	8.9%	9.2%		10%

Benchmark: 10,000 exams taken per year [1, 4]

2013	2014	2015	2016	Benchmark
9,463	9,149	9,980		10,000

- Percent of high school graduates who have participated in one or more advanced opportunities.
  Benchmark: 80% [1, 4]

2013	2014	2015	2016	Benchmark
				80%

- Percent of high school graduates who enroll in postsecondary institutions:
  - Within 12 months of graduation
    Benchmark: 60% [1, 4, 5]

2013	2014	2015	2016	Benchmark
54.5%	52.2%	45.8%		60%

  - Within 36 months of graduation
    Benchmark: 80% [1, 4, 5]

2013	2014	2015	2016	Benchmark
64.1%				80%

- Increase in cost of attendance (to the student)
  Benchmark: less than 4% [1, 4]

2013	2014	2015	2016	Benchmark
0.6%	1.9%	2.8%	-1.1%	<4%

- Gap in access measures between groups with traditionally low educational attainment (traditionally underrepresented groups) and the general populace.

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% [1, 5]

2013	2014	2015	2016	Benchmark
35.3%	34.4%	35.9%		37%

- Number of graduates of retraining programs in the technical colleges (integrated, reintegrated, upgrade, and customized)
  Benchmark: 20 [1, 4]

2013	2014	2015	2016	Benchmark
6	15	15		20

- Number of GEDs awarded per population
  Benchmark: 5,000 [1, 5]

2013	2014	2015	2016	Benchmark
4,829	879	1,653		5,000

- Number of non-traditional college graduates (age>39)
  Benchmark: 2,000 [1, 5]

2013	2014	2015	2016	Benchmark
1,801	1,863	1,811	1,806	2,000

- Number of veterans enrolled at public institutions (broken out by full-time and part time status)
  Benchmark: 2,000 [1, 4]

2013	2014	2015	2016	Benchmark
				2,000

- Gap in re-integration measures between groups with traditionally low educational attainment (traditionally underrepresented groups) and the general populace.

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% [1, 5]

2013	2014	2015	2016	Benchmark
41.0%	40.0%	42.0%		60%

- High School Cohort Graduation rate.
  Benchmark: 95% [1, 4]

2013	2014	2015	2016	Benchmark
84.1%	77.3%	78.9%		95%

- 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)
  2-year Institution Benchmark: 75% [1, 4]

2013	2014	2015	2016	Benchmark
55.2%	56.2%	56.3%	57.4%	75%

  4-year Institution Benchmark: 85% [1, 4]

2013	2014	2015	2016	Benchmark
70.9%	75.2%	75.0%	74.7%	85%

- Unduplicated percent of graduates as a percent of degree seeking student FTE.
  Benchmark: 20% [4]

2013	2014	2015	2016	Benchmark
				20%

- Percent of graduates at each level relative to Board target numbers.
  Benchmark: Certificates – 5% by 2020 [5]

2013	2014	2015	2016	Benchmark
5.8%	5.8%	6.5%	7.0%	5%

  Benchmark: Associate's – 25% by 2020 [5]

2013	2014	2015	2016	Benchmark
21.4%	21.9%	21.3%	23.1%	25%

  Benchmark: Bachelor's – 55% by 2020 [5]

2013	2014	2015	2016	Benchmark
43.5%	44.1%	44.3%	23.1%	55%

  Benchmark: Graduate degree – 15% by 2020 [5]

2013	2014	2015	2016	Benchmark
15.1%	14.1%	14.0%	13.4%	15%

- Percent of full-time first-time freshman graduating within 150% of time (2yr and 4yr).
  Benchmark: 50% (2yr/4yr) [1]

2013	2014	2015	2016	Benchmark
18.1%	16.2%			50%
41.4%	41.5%			50%

- Gap in educational attainment measures between groups with traditionally low educational attainment. Broken out by minority populations, disadvantaged students, and gender in addition to traditionally underrepresented groups and the general populace.

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

Performance Measures:

- Percent of students meeting proficient or advance placement on the Idaho Standards Achievement Test, broken out by subject area.
  Benchmark: 100% for both 5th and 10th Grade students, broken out by subject area (English Language Arts, Mathematics, Science) [1]

Grade	Subject	2013	2014	2015	2016	Benchmark
5th	ELA			60.00%	62.00%	100%
5th	Math			30.00%	31.00%	100%
5th	Science			N/A	66.00%	100%
10th	ELA			52.00%	54.00%	100%
10th	Math			38.00%	50.00%	100%
10th	Science			62.90%	63.00%	100%

- Average composite college placement score of graduating secondary students.
  Benchmark: ACT – 24 [6]

2013	2014	2015	2016	Benchmark
22.1	22.4	22.7	22.7	24

  Benchmark: SAT – 1010 [6]

2013	2014	2015	2016	Benchmark
1,356	1,357	1,366	999	1010

- Percent of students meeting college readiness benchmark on SAT in Mathematics.
  Benchmark: 60% [6]

2013	2014	2015	2016	Benchmark
35.2%	33.0%	36.1%		60%

- Gap in student achievement measures between groups with traditionally low educational attainment (traditionally underrepresented groups) and the general populace.

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).
  Benchmark: 1:0.25 [1, 2]

2013	2014	2015	2016	Benchmark
1:0.24	1:0.25	1:0.24	1:0.24	1:0.25

- Number of University of Utah Medical School or WWAMI graduates who are residents in one of Idaho's graduate medical education programs.
  Benchmark: 8 graduates at any one time [1]

2013	2014	2015	2016	Benchmark
8	8	8	8	8

- Number of Idaho graduates who participated in one of the state sponsored medical programs who returned to Idaho.
  Benchmark: 60% [1]

2013	2014	2015	2016	Benchmark
				60%

- Percentage of Family Medicine Residency graduates practicing in Idaho.
  Benchmark: 60% [1]

Program	2013	2014	2015	2016	Benchmark
Boise	54%	54%	53%	53%	60%
ISU	48%	48%	50%	50%	60%
CDA					60%

- Percentage of Psychiatry Residency Program graduates practicing in Idaho.
  Benchmark: 50% [1]

2013	2014	2015	2016	Benchmark
100% (3)	100% (2)	100% (1)		50%

- Percent of graduates (baccalaureate and above) in high paying jobs three years after graduation.
  Benchmark: 80% [1]

2013	2014	2015	2016	Benchmark
				80%

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 students participating in internships.
  Benchmark: 30% [1, 4]

2013	2014	2015	2016	Benchmark
4.1%	3.5%	3.4%		30%

- Percentage of undergraduate students participating in undergraduate research.
  Benchmark: 30% [1, 4]

2013	2014	2015	2016	Benchmark
				30%

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

Performance Measures:

- Institution expenditures from competitive Federally funded grants
  Benchmark: $112M [1, 4]

2013	2014	2015	2016	Benchmark
$89,099,167	$81,951,549	$106,047,448	$104,850,624	$112,000,000

- Institution expenditures from competitive industry funded grants
  Benchmark: $7.2M [1, 4]

2013	2014	2015	2016	Benchmark
$9,253,841	$7,748,543	$7,748,543	$7,389,079	$7,200,000

- Funding of sponsored projects involving the private sector.
  Benchmark: 10% increase [1, 4]

2013	2014	2015	2016	Benchmark
108	69.4%(183)	-27.3% (133)	24.1% (165)	10% increase

- Total amount of research expenditures
  Benchmark: 20% increase [1, 4]

2013	2014	2015	2016	Benchmark
($121,580,993)	17.4% ($142,771,851)	2.8% ($146,699,825)		20% increase

- Number of startups, number of patents, and number of disclosures.
  Benchmark: 10% increase [1, 4]

	2013	2014	2015	2016	Benchmark
Startups	5	-100% (0)	0% (0)	8	10% increase
Patents	540% (32)	-59.4% (13)	-23.1% (10)	80% (18)	10% increase
Disclosures	-21.8% (43)	9.3% (47)	-38.3% (29)	38% (40)	10% increase

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

Performance Measures:

- Percentage of graduates employed in Idaho 1 and 3 years after graduation
  Benchmark: 1 year - 75% [1, 4]

2013	2014	2015	2016	Benchmark
				75%

  Benchmark: 3 years - 80% [1, 4]

2013	2014	2015	2016	Benchmark
				80%

- Increase in gross state product (GSP)
  Benchmark: 3% or more annual growth [4]

2013	2014	2015	2016	Benchmark
2.6%	2.1%	1.9%		3% or more annual growth

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.

Performance Measures:

- Number of publicly available data dashboards
  Benchmark: 10 or more annually [4]

2013	2014	2015	2016	Benchmark
		5		10 or more

- Number of data requests from school districts
  Benchmark: 20 or more annually [4]

2013	2014	2015	2016	Benchmark
				20 or more

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

Performance Measures:

- Median SAT/ACT scores of students in public institution teacher training programs.
  Benchmark: ACT – 24 [6]

2013	2014	2015	2016	Benchmark
				24

Benchmark: SAT – 1010 [6]

2013	2014	2015	2016	Benchmark
				1010

- Percentage of first-time test takers from approved teacher preparation programs that pass the Praxis Subject Assessments (formerly the Praxis II).
  Benchmark: 90% [1, 4]

2013	2014	2015	2016	Benchmark
				90%

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.).

Performance Measures:

- Percent of Idaho community college transfers who graduate from four year institutions.
  Benchmark: 50% [1, 4, 5]

2013	2014	2015	2016	Benchmark
		49.4%		50%

- Percent of dual credit students who go-on to postsecondary education within 12 months of graduating from high school.
  Benchmark: 80% 1, 4, 5

2013	2014	2015	2016	Benchmark
71%				80%

- Percent of dual credit students who graduate high school with an Associate's Degree
  Benchmark: 10% 1, 4, 5

2013	2014	2015	2016	Benchmark
0.2%	0.2%	0.3%		10%

- Percent of postsecondary first time freshmen who graduated from an Idaho high school in the previous year requiring remedial education in math and language arts.
  Benchmark: 2 year – less than 55% 1, 4

2013	2014	2015	2016	Benchmark
62.8%	62.9%	60.7%		<55%

  Benchmark: 4 year – less than 20% 1, 4

2013	2014	2015	2016	Benchmark
21.5%	23.2%	23.5%		<20

- Percent of postsecondary students participating in a remedial program who completed the program or course
  Benchmark: 95% 1, 4

2013	2014	2015	2016	Benchmark
				95%

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

Performance Measures:

- Expense per student FTE
  Benchmark: $12,000 or less 1, 4

2013	2014	2015	2016	Benchmark
$20,303	$21,438	$22,140		$12,000 or less

- Graduates per $100,000
  Benchmark: 1.7 or more 1, 4

2013	2014	2015	2016	Benchmark
1.5	1.5	1.5		1.7 or more

- Number of degrees produced
  Benchmark: 14,000 1, 4, 5

2013	2014	2015	2016	Benchmark
13,491	13,778	14,026	14,409	14,000 or more

- Number of graduates
  Benchmark: 13,000 1, 4, 5

2013	2014	2015	2016	Benchmark
13,397	12,428	12,616	13,012	13,000 or more

- Cost per undergraduate weighted student credit hour
  Benchmark: no more than $320 1, 4

2013	2014	2015	2016	Benchmark
$493	$519	$537		<$320

- Average net cost to attend public institution.
  Benchmark: 4 year - 90% of peers (using IPEDS calculation) 3

2013	2014	2015	2016	Benchmark
103.1%	107.0%	98.6%		90% of peers

Benchmark: 2 year – 90% of public 2-year institutions from WICHE states 2

2013	2014	2015	2016	Benchmark
94.5%	98.6%	99.4%		90% of WICHE peers

- Median number of credits earned at completion of Associate's or Baccalaureate degree program.
  Benchmark: 115% of required for transfer students 1, 4

	2013	2014	2015	2016	Benchmark
Associates					115%
Baccalaureate	Transfer = 108.9 (31 to 59 credits)				115%

Benchmark: 115% of required for non-transfer students 1, 4

	2013	2014	2015	2016	Benchmark
Associates	Full-time = 89.5; Part-time = 89.9;				115%
Baccalaureate	Full-time = 140.8; Part-time = 135.1;				115%

- Institutional reserves comparable to best practice.
  Benchmark: A minimum target reserve of 5% of operating expenditures 1, 4, 6

2013	2014	2015	2016	Benchmark
BSU = 5.0%; ISU= 11.7%; UI = 2.7%; LCSC = 5.1%	BSU = 6.1%; ISU= 16.2%; UI = 4.2%; LCSC = 6.5%			5%
BSU = 5.0%; ISU= 11.7%; UI = 2.7%; LCSC = 5.1%	BSU = 6.1%; ISU= 16.2%; UI = 4.2%; LCSC = 6.5%			5%

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

Performance Measures:

- Next Steps Idaho usage
  Benchmark: 10% annual increase per year 4

2013	2014	2015	2016	Benchmark
		10,930	105.8%	10% increase

1 – Benchmarks are set based on an analysis of historical trends combined with desired level of achievement.

2 – Benchmarks are set based on performance of their WICHE peer institutions and are set to bring them either in alignment with their peer or closer to the performance level of their peer institutions.

3 – Benchmarks are set based on performance of their IPEDS peer institutions and are set to bring them either in alignment with their peer or closer to the performance level of their peer institutions.

4 – Benchmarks are set based on analysis of available and projected resources (staff, facilities, and funding) and established best practices and what can realistically be accomplished while still qualifying as a stretch goal and not status quo.

5 – Benchmarks are set based on the 60% goal.

6 – Benchmarks are set based on industry standards.

Key External Factors

Accreditation

Eligible Idaho public Universities are regionally accredited by the Northwest Commission on Colleges & Universities (NWCCU). To that end, there are 24 eligibility requirements and five standards, containing 114 subsets for which the institutions must maintain compliance. The five standards for accreditation are statements that articulate the quality and effectiveness expected of accredited institutions, and collectively they provide a framework for continuous improvement within institutions. The five standards also serve as indicators by which institutions are evaluated by national peers. The standards are designed to guide institutions in a process of self-reflection that blends analysis and synthesis in a holistic examination of:

- The institution's Mission and Core Themes;
- The translation of the Mission's Core Themes into assessable objectives supported by programs and services;
- The appraisal of the institution's potential to fulfill the Mission;
- The planning and implementation involved in achieving and assessing the desired outcomes of programs and services; and
- An evaluation of the results of the institution's efforts to fulfill the Mission and assess its ability to monitor its environment, adapt, and sustain itself as a viable institution.

Current Initiatives

1. Support and facilitate the implementation of the Governor’s Task Force for Improving Education 20 recommendations.
2. Ensure college and career readiness of all students
3. Development of intentional advising along the K-20 education continuum that links education with careers
4. Support accelerated high school to postsecondary education and career pathways
5. Develop a statewide model for remedial placement and education
6. Provide clear statewide articulation and transfer options
7. Establish metrics and accountability for all components of the public education system
8. Strengthen collaborations between education and business/industry partners
9. Provide meaningful financial aid/support to students
10. Develop transfer coordinated admission policies between community colleges and four year institutions to create pathways from 2 year to 4 year institutions.
11. Continued assessment of postsecondary institution mission fulfillment and effectiveness through the accreditation process.

Goal 1: A Well Education 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.

Activity	Description	Status
Advanced Opportunities	Beginning in FY2017, Idaho Code §33-4602 authorizes an allocation of $4,125 to every student in grades 7-12 attending an Idaho public or charter school to use towards Advanced Opportunities (i.e. dual credit, technical competency credit, Advanced Placement, and International Baccalaureate programs).	Operational.
Adult Degree Completers Scholarship	New scholarship for adult students returning to a public college or university after an absence of at least three years or more and who are completing their first undergraduate degree. It is estimated that 28% of Idahoans have some college and no degree.	Proposed (FY18 budget request) The Governor's Office and the Board will be co-sponsoring enabling legislation.
College & Career Advising	Beginning in FY2017, the Idaho Legislature appropriated $5M as direct funding to school districts to provide college and career advising and mentoring. school district/charter school must have a College and Career Advising and Mentoring Plan, plans must be submitted to the State Board of Education and the effectiveness of the plans must be reported annually. The Board provides schools districts with information about six evidence-based advising model programs which can be used, and also will provide professional development opportunities for advisors.	Implementation stage. College & Career Advising plans have been submitted.
Direct Admissions	Automatically admit all graduating Idaho high school seniors to six or more of Idaho's public college and universities based students' GPA and SAT score.	Operational.

Goal 1: A Well Education Citizenry -- Idaho's P-20 educational system will provide opportunities for individual advancement across Idaho's diverse population

Eastern Idaho community college	The Board supports expanding access to quality, affordable postsecondary education. Leveraging the existing EITC campus and infrastructure to provide access to postsecondary academic (lower-division) and CTE programs in the Idaho Falls area presents a unique opportunity.	Holding $5M in trust as seed money for the creation of a new community college in eastern Idaho.
Expanding Online Program Offerings	A Board-authorized Online Program Fee provides institutions with flexibility needed for competitive pricing.	Operational. Six new programs have been added since the fee was first authorized in 12/2014.
Idaho College Portal	A single-site application for Idaho resident high school seniors to apply to any Idaho public colleges and universities. Students will only need to provide enough personal information to verify their identity, and then the system will automatically populate the remaining necessary fields with data pulled in from ISEE. Students will be able to apply to one or more institutions from a dropdown list. When combined with Direct Admissions, this will eliminate another unnecessary barrier to the Board's attainment goal and will leverage the Board's governance structure.	In development stage. Will go live for the 2017-18 application cycle.
www.NextSteps.Idaho.Gov	One-stop-shop portal for students and parents, and teachers of Idaho-specific information about postsecondary opportunities.	Operational and expanding.

Goal 1: A Well Education Citizenry -- Idaho's P-20 educational system will provide opportunities for individual advancement across Idaho's diverse population

Open Educational Resources	"OER are teaching, learning, and research resources that reside in the public domain or have been released under an intellectual property license that permits their free use and re-purposing by others. Open educational resources include full courses, course materials, modules, textbooks, streaming videos, tests, software, and any other tools, materials, or techniques used to support access to knowledge." (Hewlett Foundation)	The Board and the State Dept. of Ed are working together on an initial effort to develop OER for the top five enrolled dual credit courses.

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.

Activity	**Description**	**Status**
Adult Degree Completion Scholarship	[see Goal 1, Obj. A]	
Co-requisite Remediation	Evidence suggests that co-requisite remediation (i.e. enrolled in credit bearing, gateway courses while being required to attend mandatory academic and non-academic supports) results in better outcomes.	The co-requisite model is nearly fully scaled in Idaho for English/ language arts. The institutions now working to scale co-requisite math remediation to the greatest possible extent.
Articulation & Transfer Portal	Online crosswalk used to determine how course credits (including dual credit) will transfer to another public college or university in Idaho. Also includes an Advanced Placement crosswalk.	Operational.
Outcomes-based Funding	Provide incentive funding for colleges and universities to ensure that students complete academic and technical programs and obtain certificates and degrees which will prepare them for productive careers in the State's workforce.	Proposed (FY18 budget request)

Goal 1: A Well Education Citizenry -- Idaho's P-20 educational system will provide opportunities for individual advancement across Idaho's diverse population

Prior Learning Assessment	Use of validated methods for assessing learning to enable students to demonstrate knowledge, competencies and skills in a particular field and have that learning evaluated for college credit by appropriate faculty.	Board policy is being updated to establish new statewide expectations and minimums.

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

Activity	**Description**	**Status**
Advanced Opportunities	[see Goal 1, Obj. A]	
College & Career Advising	[see Goal 1, Obj. A]	
Outcomes-based Funding	[see Goal 1, Obj. B]	
Direct Admissions	[see Goal 1, Obj. A]	
Idaho College Portal	[see Goal 1, Obj. A]	

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

Activity	**Description**	**Status**
Program Prioritization	Board-directed initiative for college and universities to rigorously evaluate, prioritize and rank all academic and non-academic programs into quintiles. The process has been institutionalized and deeply embedded into the resource allocation processes at the institutions.	Operational.
Improve Teacher Prep Programs	Ongoing work is being done with individual programs as well as the various teacher preparation groups within the state. Most recently consensus was reached on measures for identifying varying levels of program performance. Work in this area is ongoing and will involve the process for evaluating programs for continued state approval.	In Progress

Goal 1: A Well Education Citizenry -- Idaho's P-20 educational system will provide opportunities for individual advancement across Idaho's diverse population

Low Performing Schools	Pursuant to S1412 (2015), OSBE received $750k to conduct school improvement evaluations. OSBE awarded a contract to University of Idaho to perform evaluations of one school district in each of the six education regions of the state.	Contract awarded to UI College of Ed to conduct improvement evaluations for one school district in each of the six regions.

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

Activity	**Description**	**Status**
College & Career Advising	[see Goal 1, Obj. A]	
K-20-workforce longitudinal data system	The state has three separate longitudinal data systems (K-12, postsecondary and workforce) from which masked data can be extracted in order to analyze college and career preparedness. The state also participates in a voluntary data exchange with several states (including OR and WA) in order to track movement across state lines.	Operational and expanding.

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.

Activity	Description	Status
CTE program alignment	Ensure CTE credits earned in high school meet content and competency requirements to transfer to college.	In Progress.
Computer Science Co-Op Program	Participating college & university students would take one to two years of core classes and then alternate school semesters in school with working for a relevant Idaho business. Modeled after Univ. of Waterloo's renowned program.	Proposed.
Idaho SkillKStack	Badging/micro-certification platform that allows Idaho's educators to validate the skills their students demonstrate proficiency in leading to industry-relevant badges, which can stack towards college credit or industry certifications.	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 B: Innovation and Creativity – Increase creation and development of new ideas and solutions that benefit society.

Activity	Description	Status
Higher Education Research Council	Idaho Global Entrepreneurial Mission (IGEM) grant program (as seed funding for strategically investing in the development of expertise, products, and services which result in state economic growth) and Incubation Funds program (to support technology transfer and commercialization)	Operational.
Capital project	Construction of two facilities to house cybercore and collaborative computing center. Will provide significant educational opportunities for Idaho postsecondary students.	Proposed.

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.

Activity	*Description*	*Status*
K-20-workforce longitudinal data system	[see Goal1, Obj. E]	

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

Activity	*Description*	*Status*
Career Ladder Performance Eval Audits	Pursuant to H571 and H647 (2016), the Board has been charged with conducting independent reviews of career ladder evaluations	Contract awarded to BSU College of Ed to perform audits.
Improve Teacher Prep Programs	[see Goal 1, Obj. D]	

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.)

Activity	*Description*	*Status*
Prior Learning Assessment	[see Goal 1, Obj. B]	
CTE program alignment	[see Goal 2, Obj. A]	
Articulation & Transfer Portal	[see Goal 1, Obj. B]	
Co-requisite Remediation	[see Goal 1, Obj. B]	

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

Activity	*Description*	*Status*
Program Prioritization	Rigorous evaluation and prioritization of postsecondary academic and non-academic programs based on meaningful metrics.	Has been institutionalized and deeply embedded into the institutions' resource allocation process.
Outcomes-based Funding	[see Goal 1, Obj. B]	

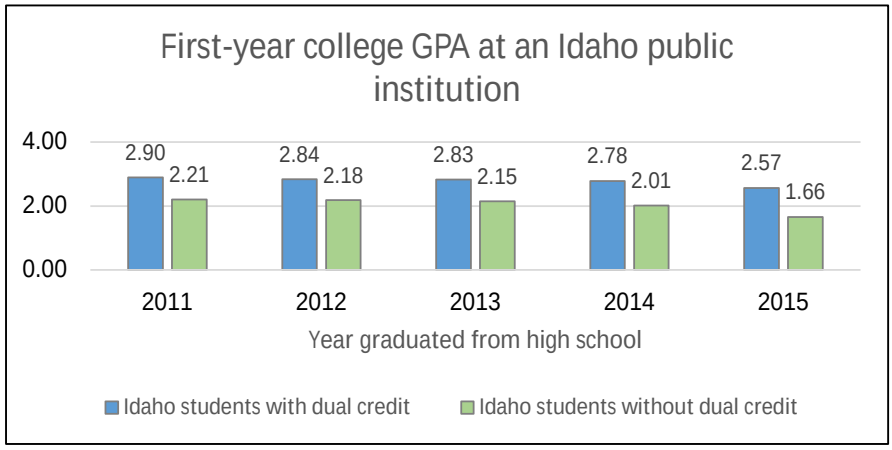
GOAL 3: Effective and Efficient Educational System – Ensure educational resources are coordinated throughout the state and used effectively.

Graduate Program Audits	Newly approved graduate programs are reviewed to ensure enrollment assumptions manifest.	Operational.

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

Activity	***Description***	***Status***
Direct Admissions Media Campaign		Ongoing.
NextSteps.Idaho.gov	[see Goal 1, Obj. A]	
Regional Superintendents Meetings		Ongoing.
K-12 stakeholder meetings	Meeting with IASA, ISBA and IEA representatives monthly	Ongoing.
Legislative advocacy	Meet with members of House & Senate Ed Committees, and JFAC throughout the year.	Ongoing.

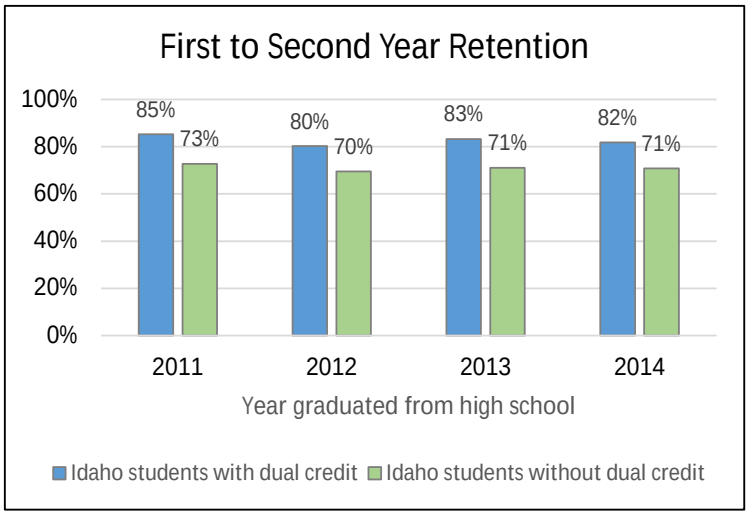
Prepares High School Students for College



Since 2011, Idaho high school students who have participated in dual credit courses earned higher grades in their first year of college than Idaho students who did not take dual credit courses. Graduates in 2015 who took dual credit courses averaged a 2.57 GPA in their first year of college while 2015 graduates who did not take dual credit courses averaged a 1.66 GPA.

Increases the Likelihood of Success as College Students

Idaho students who took dual credit courses while in high school had significantly higher college retention rates from their first year to their second year at a postsecondary institution. Across all years, more than 80 percent of dual credit students returned to college their second year. Across all years, the retention rate for non-dual credit students was around 70 percent.



Summary

Dual credit students earn higher grades when attending college, and continue their college careers at higher rates than students who do not take advantage of dual credit courses while in high school.

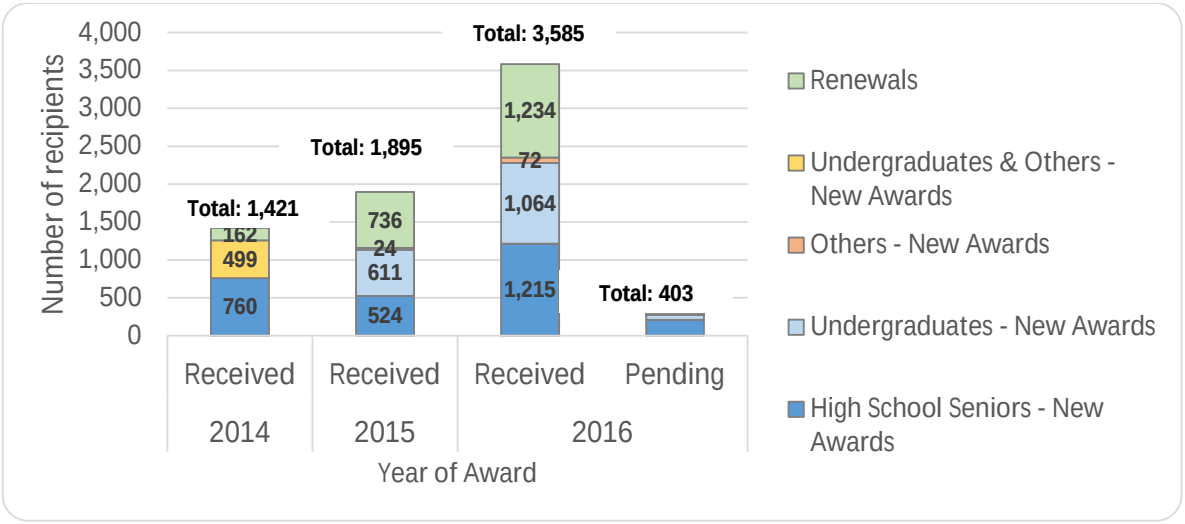
*These data were analyzed using the Idaho Statewide Longitudinal Data System for Idaho college and university students from 2011 through 2016.

Idaho State Board of Education Report on Idaho Opportunity Scholarship

2017

The Opportunity Scholarship is designed to help low-income, high-achieving Idaho students attend and complete college in Idaho.[1] In 2013, the Idaho Legislature expanded the existing Idaho Opportunity Scholarship by directing money from other scholarship programs into the Opportunity Scholarship. Funding for the Opportunity Scholarship increased from approximately $1.045 million in FY2014 to approximately $5.127 million in FY2015, $5.191 million in FY2016, and $10.142 million in FY2017.

Recipients of the Opportunity Scholarship



The number of students receiving the Idaho Opportunity Scholarship has increased dramatically since 2014.[2] In 2014, there were 1,421 total recipients. Of those, 162 were renewals. By 2016, there were 3,585 total recipients.[3] Renewals made up

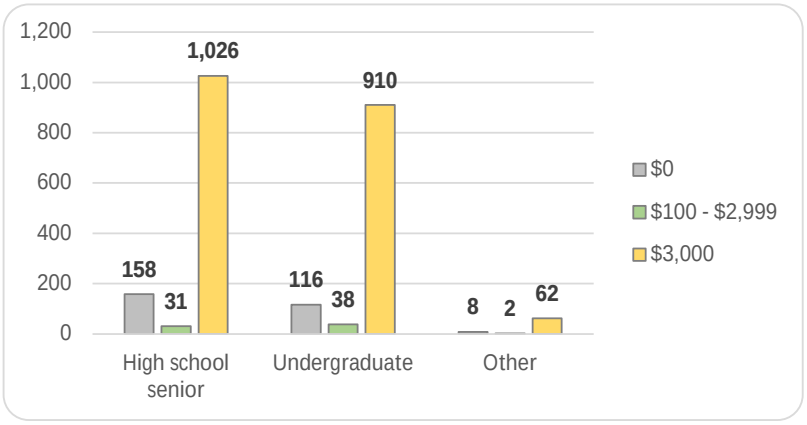
[1] To qualify for the scholarship, a student must: be an Idaho resident who is a graduate of an Idaho high school, have had a cumulative GPA of 3.0 or above, complete the application and the Free Application for Federal Student Aid (FAFSA) by March 1, and enroll as a full-time undergraduate student seeking their first undergraduate degree. Students can use the Opportunity Scholarship at any public Idaho institution as well as BYU-Idaho, Northwest Nazarene University, and the College of Idaho.

[2] The award year refers to the calendar year in which the scholarships were awarded. The funds would have been disbursed in the following fiscal year. In other words, scholarships awarded in award year 2016 would have been disbursed in fiscal year 2017.

[3] We do not include those awards that are pending in this discussion.

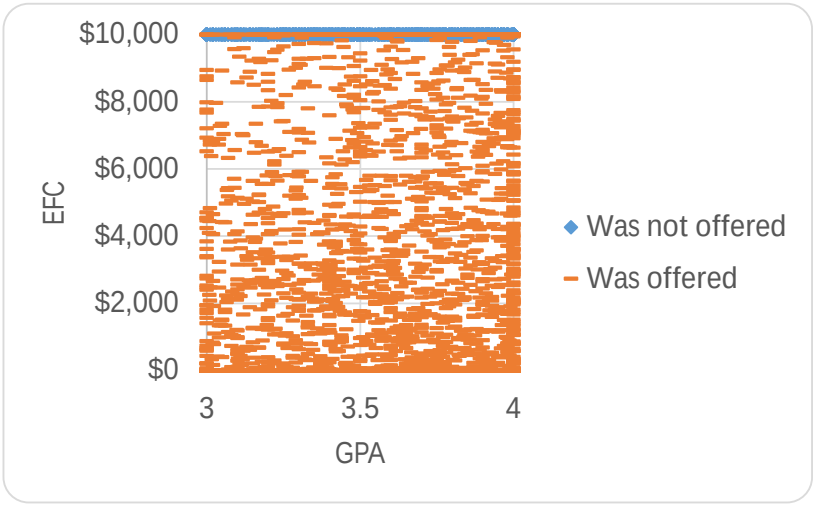
1,234 of those recipients. While the total number of awards increased by 150 percent, the number of renewals increased by 660 percent.

Award Amount



The maximum award a student can receive is $3,000 per year. However, a student may receive less if they receive other scholarships and grants. The student can only receive an award up to the difference between the cost of college and all other scholarships and grants. In award year 2016, there were a total of 282 students (158 high school seniors, 116 college undergraduates, and 8 others) who received an award of $0 due to other scholarships and grants. These students can renew their Opportunity Scholarship and be awarded a positive amount in subsequent years. The average award across all students who received a positive amount in award year 2016 was $2,897.

The Award Process



The Idaho Opportunity Scholarship has two main selection criteria: academic achievement and financial aid. First-time applicants are ranked using a process that assigns academic achievement a rank of 30 percent and financial need a rank of 70 percent. After all renewals are funded, the remaining funds are distributed to the first-time applicants with the highest overall rankings. This figure shows the Estimated Family Contribution (EFC) and GPA for those students who were awarded a scholarship versus those that were not awarded. In award year 2016, all otherwise eligible students with an EFC of up to $11,500 were awarded the scholarship.

Idaho Opportunity Scholarship Evaluation – 2017 Preliminary[1]

Cathleen M. McHugh, Ph.D.[2]
November 21, 2016

In 2013, the Idaho Legislature expanded the existing Idaho Opportunity Scholarship by directing money from other scholarship programs into the Opportunity Scholarship. Funding for the Opportunity Scholarship increased from approximately $1.045 million in FY2014 to approximately $5.127 million in FY2015, $5.191 million in FY2016, and $10.142 million in FY2017. The legislation that expanded the Opportunity Scholarship also directed the Idaho State Board of Education to evaluate the program on a regular basis. This paper serves as a preliminary evaluation for 2016. It will be updated as data on college enrollment becomes available.

The Idaho Opportunity Scholarship

The Idaho Opportunity Scholarship is awarded to Idaho residents who graduate from Idaho high schools and enroll in an Idaho postsecondary educational institution in order to pursue their first undergraduate degree or certificate. In addition to traditional high school graduates, both home-schooled students and students who obtain a General Equivalency Diploma (GED) are eligible for the scholarship. Students can initially receive the scholarship either as a high school senior or as an undergraduate attending an eligible Idaho postsecondary educational institution. Students who initially receive the scholarship as an undergraduate must have graduated from an Idaho high school and be making satisfactory academic progress. Students apply electronically.[3] In addition to the application, students must complete the Free Application for Federal Student Aid (FAFSA).

A student must have an unweighted cumulative GPA of 3.0 in order to be eligible for the scholarship.[4] High school GPAs are used for students who have not yet graduated from high school while college GPAs are used for students who apply as undergraduates. After initial receipt of the scholarship, students can renew their scholarship for up to four years if they continue to meet the eligibility requirements. These requirements include maintaining a 3.0 GPA during college and maintaining satisfactory academic progress. There are also eligibility requirements with regard to the number of postsecondary academic credit hours attempted/completed. Students who have attempted or completed 100 credits must identify a major and submit an academic transcript to the Board Office. A student will not be eligible for renewal of the Opportunity Scholarship if they cannot complete their degree in the major identified in 2

[1] This is an update of the paper "An Evaluation of the Idaho Opportunity Scholarship". It was originally written in November 2015 and updated in January 2016. In this update, figures have been updated, added, and deleted. Some of the report, such as descriptions of the scholarship and descriptions of the dimensions on which to evaluate the scholarship, has remained unchanged.

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cathleen.mchugh@osbe.idaho.gov

[3] Students are able to request paper applications if they are unable to complete the application electronically.

[4] Students who receive a GED must receive their GED in Idaho and take either the ACT or SAT to be eligible for the scholarship. GED students must receive a score of at least 20 on the ACT or receive a score of at least 950 on the SAT.

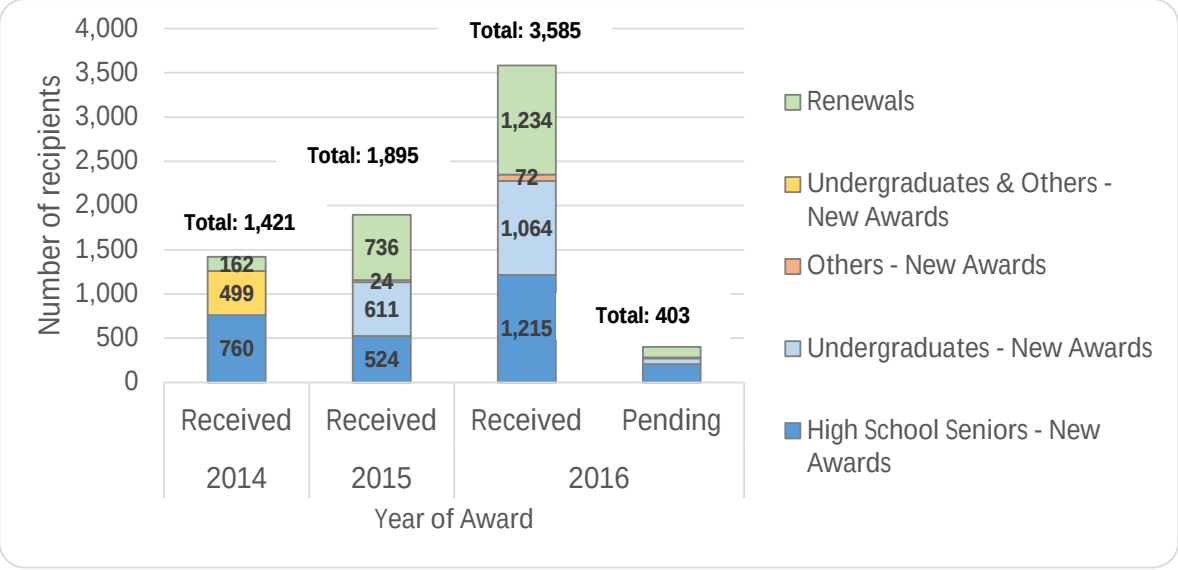
semesters. Finally, if students interrupt their enrollment for more than 4 months but less than 2 years, then they must file a request for an extension of the scholarship.

The maximum amount of the scholarship is set by the State Board of Education annually based on the educational costs for attending an eligible Idaho postsecondary educational institution. Scholarship renewals are funded at the current level of the scholarship and receive funding priority. After all renewals are funded, scholarships are awarded to first-time applicants. First-time applicants receive a score which is a weighted average of financial need (70 percent) and academic eligibility (30 percent). First-time applicants are then ranked according to that score. Awards are given to the highest ranking applicants until all funds are disbursed. Not all recipients receive the same scholarship amount. A recipient will receive less than the maximum amount if they have other financial aid and receipt of the full scholarship would cause their total financial aid package to be greater than the cost of college.

The number of students who receive a scholarship depends on the degree to which the Idaho Legislature funds the Idaho Opportunity Scholarship. As funding has increased, the number of students who received the award has increased (see Figure 1). In award year 2014 (FY2015), 1,421 students were awarded an Opportunity Scholarship. By award year 2016, that number had increased to 3,585 with an additional 403 awards pending.

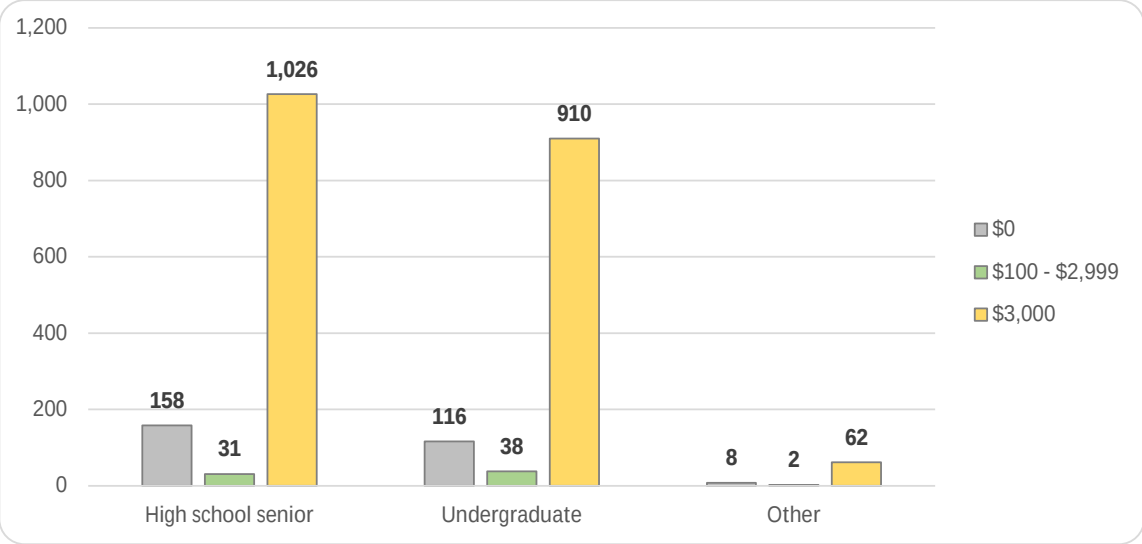
Renewals are given funding priority. Therefore, when a student is awarded an Opportunity Scholarship, funds are encumbered not only in the award year but also in subsequent years. If funding for the Opportunity Scholarship is not increased after a year with a large number of first-time awards, then the number of first-time awards will fall in subsequent years as renewals crowd out the availability to make new awards. Between 2015 and 2016, the total number of new awards approximately doubled. It is likely that the number of new awards will fall in the 2017 award year as priority is given to renewal awards unless funding for the Opportunity Scholarship is increased.

Figure 1: Number of students receiving Opportunity Scholarship, 2014 through 2016 award years



The maximum award a student can receive is $3,000 per year. However, a student may receive less if they receive other scholarships and grants. The student can only receive an award up to the difference between the cost of college and all other scholarships and grants. In award year 2016, there were a total of 282 students (158 high school seniors, 116 college undergraduates, and 8 others) who received an award of $0 due to other scholarships and grants. These students can renew their Opportunity Scholarship and be awarded a positive amount in subsequent years. However, they did use a year of eligibility for the scholarship in the year they received an award of $0. The average award across all students who received a positive amount in award year 2016 was $2,897.

Figure 2: Amount of Opportunity Scholarship awarded by student status, 2016 award year



Evaluating the Idaho Opportunity Scholarship

There are several dimensions on which to evaluate the effectiveness of a scholarship. This paper will evaluate the Idaho Opportunity Scholarship using the following questions.

- First, is the scholarship process functional? Do applicants face unnecessary barriers in the application or renewal process?
- Second, is the scholarship serving its intended population? The Idaho Opportunity Scholarship is focused on helping economically disadvantaged students who show academic promise. Is this the population actually served?
- Third, is the Idaho Opportunity Scholarship effective in changing behavior? Are recipients more likely to go on to college than similar non-recipients? Are recipients more likely to stay in state than similar non-recipients? Are recipients are more likely to complete college than similar non-recipients?
- Fourth, are there any unintended consequences of the Idaho Opportunity Scholarship? Students will lose their Opportunity Scholarship if they do not maintain a 3.0 GPA in college. Does this affect which major they choose or which major they ultimately graduate with? Do students who become ineligible to renew their scholarships still complete college?

Not all of these questions will be completely answered in this paper due to data limitations. As the data becomes available, all of the above questions will be examined.

Data Note

Applications for the Idaho Opportunity Scholarship are due in the spring and the recipients are announced in the late spring/early summer. Funds are then disbursed the following academic year. Therefore, one can refer to any particular scholarship year by the year it was awarded or the year in which funds were disbursed. Throughout this paper, we use years to refer to the year the scholarship was awarded. Table 1 shows the relationship between the year of award, the graduating class who would have received the scholarship, and the year when the funds were actually disbursed.

Table 1: Relationship of scholarship years

Year of Award	High School Graduating Class Receiving Award	Fiscal year of disbursement	Academic year of disbursement	Type of Opportunity Scholarship
2013	2013	FY2014	2013-2014	Old
2014	2014	FY2015	2014-2015	New
2015	2015	FY2016	2015-2016	New
2016	2016	FY2017	2016-2017	New

How well does the Idaho Opportunity Scholarship function?

This section examines if students face any obstacles in applying for or renewing the Idaho Opportunity Scholarship. In 2015, there were 5,824 initial applications for Idaho scholarships (see Figure 2). About half of those applications were from high school seniors and about half were from college undergraduates. In 2016, there were 4,728 applications – a decrease of approximately 20 percent. Applications from college undergraduates decreased the most with a 33 percent decrease while applications from high school seniors decreased 5 percent.

As mentioned earlier, Opportunity Scholarships are awarded based on a score. The score has two components: financial need and academic accomplishment. After each application is scored, they are ranked and scholarships are awarded by this ranking. However, not all applications are actually scored and ranked. Figure 3 shows the share of applications received for the Idaho Opportunity Scholarship that were actually ranked. Applications would not be ranked if the applicant did not have a qualifying GPA (a GPA of 3.0), if the applicant did not submit a FAFSA, or if the application was otherwise incomplete. As can be seen, 80 percent of applications submitted by high school seniors were ranked while less than 60 percent of those submitted by college undergraduates were ranked in 2015. In 2016, approximately 80 percent of applications submitted by both high school seniors and college undergraduates were ranked. Between 2015 and 2016, the number of *ranked* applications fell 7 percent for high school seniors and 5 percent for college undergraduates.

Figure 2: Number of applications in 2015 and 2016 award years

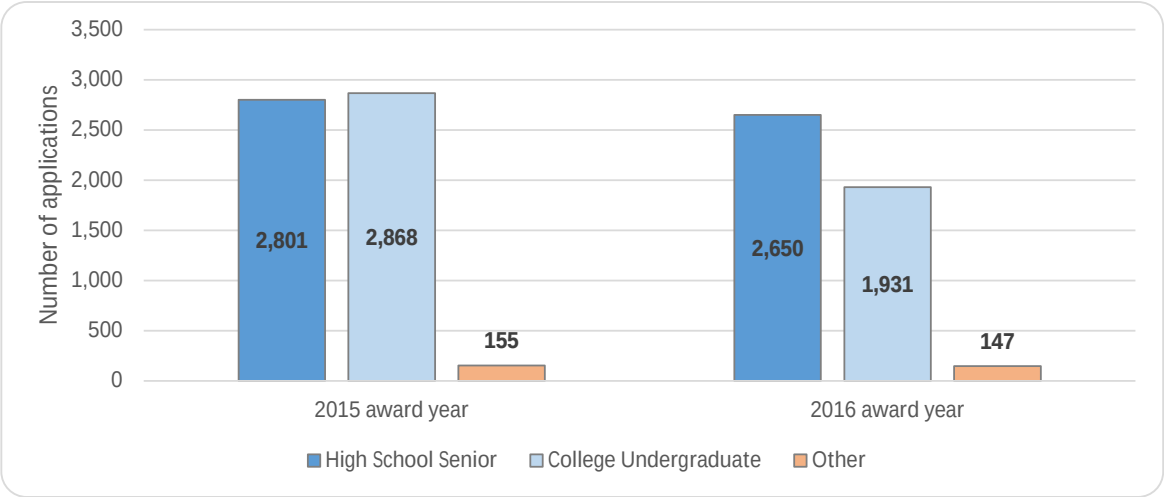
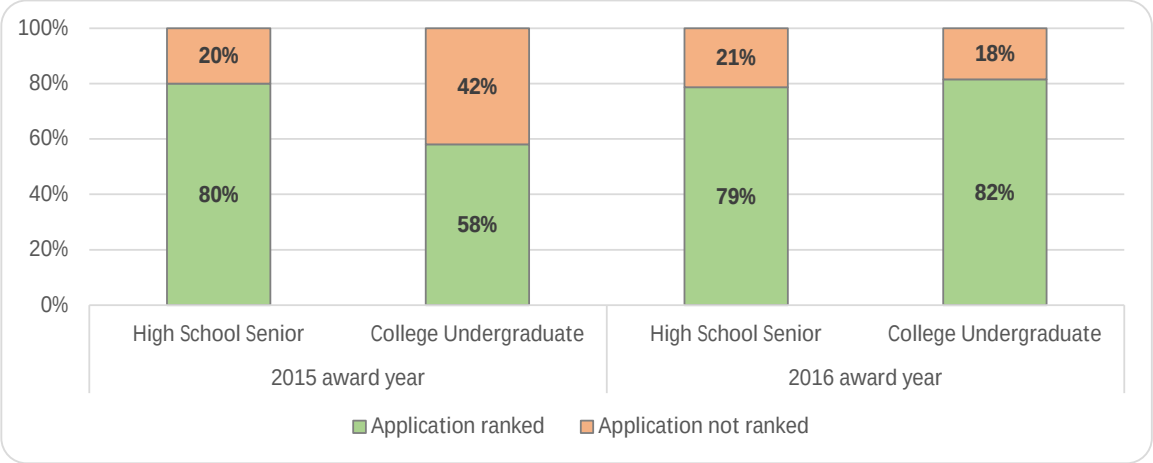


Figure 3: Share of Idaho Opportunity Scholarships that were ranked in 2015 and 2016 award years



Figures 4 and 5 show what was deficient in applications that were not ranked. In 2015 (see Figure 4), the most common deficiency for both high school seniors and college undergraduates was lack of a FAFSA. Almost 80 percent of undergraduates and 66 percent of high school students who were not ranked in 2015 did not file a FAFSA. The vast majority of those students who did not file a FAFSA did have an eligible GPA. This estimate could be understated as the "Other" category includes students who filed the FAFSA after the deadline.[5]

[5] It also includes students who indicated they no longer wished to be considered for the scholarship, renewal students who were initially misclassified as first time applicants, students who actually did not attend an Idaho high school, homeschool students who did not submit a transcript, or students who were not citizens of the United States.

Figure 4: Reasons applications were incomplete for 2015 award year

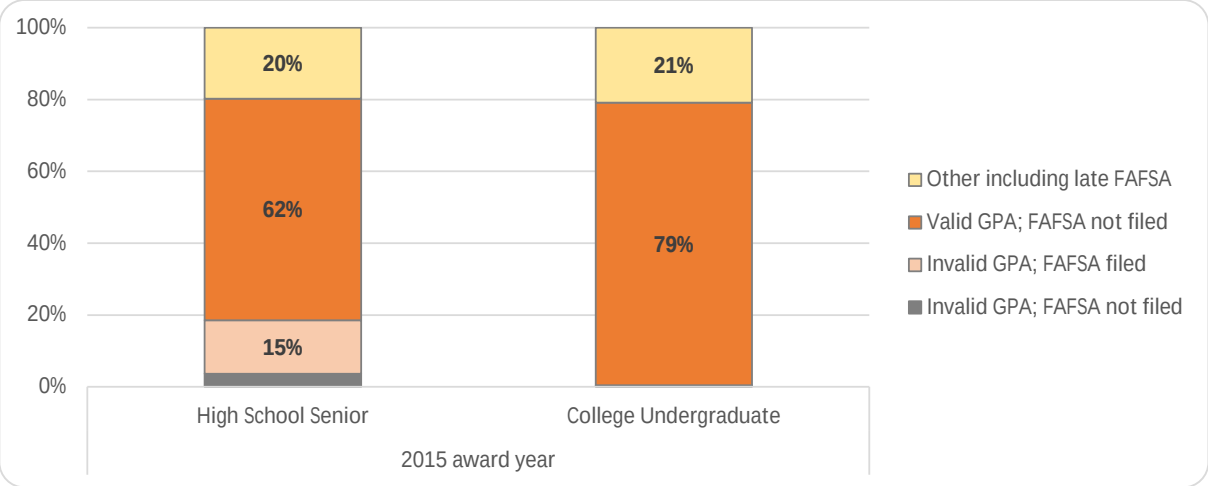
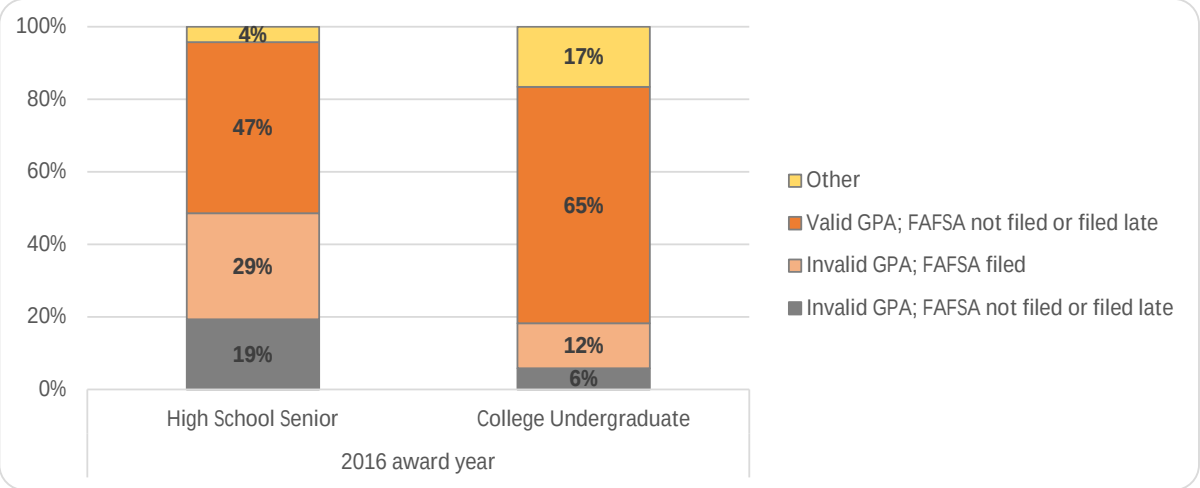


Figure 5: Reasons applications were incomplete for 2016 award year



For 2016, we were able to split those who filed a late FAFSA out of the "Other" category and include it in the "FAFSA not filed" category. In 2016 (see Figure 5), on-time completion of the FAFSA continued to be a roadblock for college undergraduates who otherwise would have likely qualified for the scholarship. Almost two-thirds of the applications that were not ranked were not ranked solely due to a missing or late FAFSA. However, it became less of a roadblock for high school seniors. In 2016, approximately half of the applications that were not ranked were not ranked solely due to a missing FAFSA. In 2015, it has been 62 percent.

The FAFSA is an important part of the application process. It is the only way in which the State Board can actually verify a student's financial need. Therefore, it is likely it will remain a necessary part of the application. OSBE staff believes completion of the FAFSA will become less of an issue for students as the FAFSA transitions to being based on income from two years ago rather than last year's income. In 2017, students will be able to complete both their application for the Idaho Opportunity Scholarship and their FAFSA during College Application Week.

In 2016, 29 percent of high school seniors who applied and were not ranked did not have an eligible GPA. The Opportunity Scholarship is based on a student's *unweighted* GPA. Students may apply without being eligible if they do not properly understand the difference between their unweighted and their weighted GPA.

Students must meet several requirements in order to renew. One of the requirements is that they maintain a 3.0 GPA in college. As data becomes available, we will show the share of high school seniors who received the scholarship in award year 2015 and did not renew due to the GPA requirement.

A student also cannot renew if they have 100 credits and cannot complete their major in two semesters. In the future, we will examine how many students will be affected by this requirement due to the accumulation of dual credits.

Above we identified barriers to students who started the application process. There may also exist barriers to students even beginning the application process. It would be extremely difficult to identify barriers to even starting the application process. However, one can examine whether or not the applicant pool mirrors the underlying population in order to understand if these barriers (and the barriers identified above) are disproportionately born by certain groups of students. In the future, we will examine them by race/ethnicity, gender, and school district region in order to understand if there are groups which are under-represented in the ranked applicant pool. In this version, we show preliminary evidence that students from school districts in Regions 4, 5, and 6 are under-represented in the ranked applicant pool. Table 2 shows the share of 2015 high school graduates from each region as well as the share of 2016 ranked applications from each region. (This will be updated as data on the number of 2016 graduates from each region becomes available.) In future work, we will also examine reasons why these regions are under-represented.

Table 2: Share of ranked applicants from each school district region, 2016 award year

	2015 graduation year		2016 award year	
Region	Total graduates	Share of graduates	Total ranked applicants	Share of ranked applicants
1	2,082	12%	265	13%
2	876	5%	108	5%
3	7,523	44%	989	50%
4	2,033	12%	212	11%
5	1,540	9%	143	7%
6	2,898	17%	279	14%

Is the Idaho Opportunity Scholarship serving its intended population?

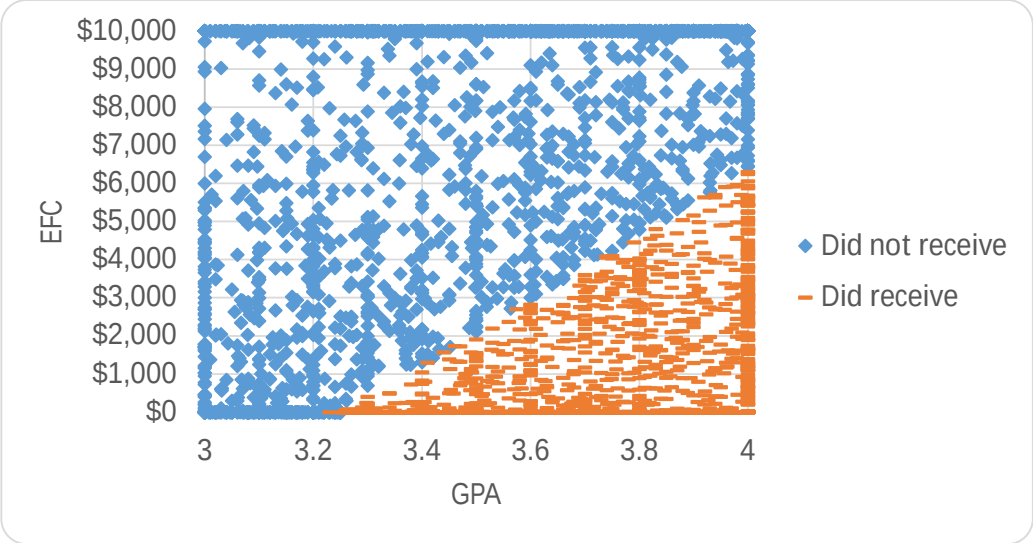
Does the Idaho Opportunity Scholarship serve the population it was designed to serve? The Idaho Opportunity Scholarship was designed to help high achieving, low-income students. Thus, there are two main selection criteria – academic achievement and financial need. Figure 6 shows the GPA and EFC[6] of those who applied and were ranked for award year 2015. Those who did not receive the scholarship are marked with blue diamonds and those who did receive the scholarship are marked with orange dashes. The recipients all fall into a triangle of the graph due to the weighting process. The weighting process ensures that students with the highest GPAs will qualify with relatively higher EFCs than students with the lowest GPAs. In 2015, students who had a 4.0 were awarded the scholarship if their EFC was around $6,000 or below. Students with an EFC of $0 were not awarded the scholarship unless they had a GPA slightly above 3.2.

Figure 7 replicates Figure 6 but for the 2016 award year. For the 2016 award year, there is no triangle demarcating recipients and non-recipients. Due to the increase in funding between FY2016 and FY2017, the vast majority of students who qualified for the Opportunity Scholarship in award year 2016 were awarded the Opportunity Scholarship. Students who had a 4.0 GPA were awarded an Opportunity Scholarship as long as their EFC was below the cost of college. All students with an EFC below $11,500 who met the other criteria were awarded an Opportunity Scholarship.[7]

As can be noted, there are equity discrepancies across the different years of the scholarship due to the changes in funding. In the 2015 award year, there were students with EFCs of $0 who did receive the Opportunity Scholarship while all students with EFCs of $0 were awarded in the 2016 award year. Due to the increase in first-time awards in award year 2016 and the likely increase in renewals in award year 2017, it is likely that there will be first-time applicants in award year 2017 with a $0 EFC who will not receive the Opportunity Scholarship unless funding for the scholarship is increased.

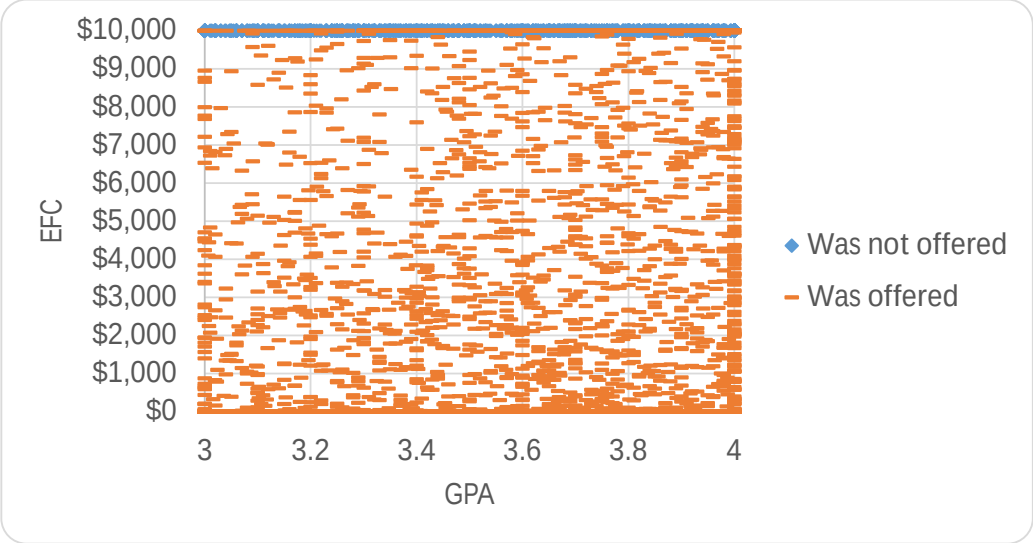
[6] In Figures 6 and 7, all EFCs above $10,000 are reported as $10,000.
[7] Some students' EFCs were updated after the March 1 deadline. While these updated EFCs were uploaded into the system, receipt of the scholarship was not affected as receipt of the scholarship is calculated using EFC as of March 1.

Figure 6: EFC and GPA of applicants that were ranked in the 2015 award year



Note: Only students ranked using their GPA are included. Not included are 2 students whose status is under review.

Figure 7: EFC and GPA of applicants that were ranked in the 2016 award year



Note: Only students ranked using their GPA are included. Not included is 1 student whose status is under review.

To better understand if the Opportunity Scholarship is serving the intended population, one also needs to examine if the ranked applications are representative of the state. If they are, then the weighting formula will automatically ensure that the students with the most financial need and highest academic achievement receive the scholarship. We discuss our work on this in the previous section.

Is the Idaho Opportunity Scholarship effective at changing behavior?

To understand if the Idaho Opportunity Scholarship is effective at changing behavior, we examine several questions. Are recipients of the Idaho Opportunity Scholarship more likely to go on to college in the fall immediately after graduation than similar non-recipients? The Opportunity Scholarship just covers fees at the two-year institutions and covers about half of tuition and fees at the four-year institutions in Idaho.[8] Therefore, even students who receive the scholarship will still have to have other sources of funds in order to attend college. Are recipients more likely to stay in–state to go to college than similar non-recipients? Do recipients of the Opportunity Scholarship complete college at higher rate than similar non-recipients?

At this stage, we will do a simple comparison of go-on rates for different populations for the first two questions. First, we will compare the go-on rates for all recipients versus the rate for all high school seniors. This will obviously be higher and does not tell us if the Opportunity Scholarship actually changes behavior. For illumination on that point, we will compare the go-on rates for recipients who just barely qualified for the scholarship versus those who just barely did not qualify for the scholarship. Differences in behavior between these two groups is likely due to receipt of the Opportunity Scholarship. We will do this analysis as the necessary data becomes available. We will do similar analysis for the probability a student stays in state. This data is also not yet available.

In the long run, we will examine completion rates of those who receive the Opportunity Scholarship versus those who do not. This data will not be available for several years. In the short run, we can examine retention rates of those who received the scholarship versus retention rates of other undergraduates with similar EFCs and GPAs. The complete data for this is also not yet available.

Does the Idaho Opportunity Scholarship have unintended effects?

While the Idaho Opportunity Scholarship may affect some behavior, there may also be unintended effects. A recent study found that recipients of Georgia's HOPE Scholarship were less likely to graduate with a STEM degree[9] than they would have been without the scholarship. The study concluded that the decline came from students who started out in STEM majors but then switched to a non-STEM major before graduation in order to maintain their GPA so they would remain eligible for the scholarship. The same study also found some evidence of high school GPA inflation after the HOPE scholarship was instituted. In this section, we will examine if either of these effects are apparent in Idaho. The data for this analysis is still pending.

In this section, we will also examine whether or not students who receive the Opportunity Scholarship and then are not able to renew it graduate from college at the same rate as similar students. This data is also not yet available.

Conclusion

This analysis is one of the preliminary steps of an evaluation of the Idaho Opportunity Scholarship for award year 2016. This evaluation will be updated as the necessary data becomes available.

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[9] Solquist, David L., and John V. Winters. "The effect of Georgia's HOPE scholarship on college major: a focus on STEM.", IZA Journal of Labor Economics (2015) 4:15.

SUBJECT

Higher Education Research 2017-2021 Strategic Plan

REFERENCE

April 2010	The Board was provided with a summary of the Statewide Strategic Plan for Higher Education Research
October 2010	The Board was provided with an update of the progress made toward the development of the Statewide Strategic Plan for Higher Education Research
December 2011	Board approved the Statewide Strategic Plan for Higher Education Research
December 2012	The Board was updated on the progress made in the Higher Education Research Strategic Plan
December 2013	The Board was updated on the progress made in the Higher Education Research Strategic Plan and received the annual report of the Higher Education Research Council
February 2015	Board approved the Statewide Strategic Plan for Higher Education Research
October 2016	The Board was provided the Performance Measure Report for the Higher Education Strategic Plan

APPLICABLE STATUTE, RULE, OR POLICY

Idaho State Board of Education Governing Policies and Procedures, Section III.W., Higher Education Research

BACKGROUND/DISCUSSION

Board Policy III.W, Higher Education Research, recognizes the significant role science, technology, and other research play in statewide economic development as well as the need for collaboration and accountability in publicly funded research, to this end, the Higher Education Research Council (HERC) is assigned the responsibility of directing and overseeing the development, implementation, and monitoring of a statewide strategic plan for research. The Statewide Strategic Plan for research will assist in the identification of general research areas that will enhance the economy of Idaho through the collaboration of academia, industry, and/or government. The Research Strategic Plan was completed and approved by the Board in December 2011. The Board then approved an updated plan in 2015. The Board has received annual performance measure reports each year.

The plan represents the role Idaho's research universities play in driving innovation, economic development, and enhancing the quality of life in Idaho through national and internationally research programs in strategic areas. The plan identifies areas of strength among Idaho's research universities; research challenges and barriers facing universities; research opportunities Idaho should capitalize upon to further build its research base, and steps for achieving the research vision for Idaho's universities.

The Higher Education Research Council, comprised of the Vice Presidents of Research from the three universities, the Provost and Vice President of Academic Affairs at Lewis-Clark State College, and industry partners; met in July 2016 and revised the strategic plan. In September the Council met and approved the proposed amendments to the attached Higher Education Research Strategic Plan.

IMPACT

Taking a strategic approach to invest in the state's unique research expertise and strengths will lead to new advances and opportunities for economic growth and enhance Idaho's reputation as a national and international leader in excellence and innovation.

ATTACHMENTS

Attachment 1 – Statewide Strategic Plan for Higher Education Research Page 3

STAFF COMMENTS AND RECOMMENDATIONS

The strategic plan is monitored annually and updated as needed based on the work of HERC and direction from the Board. This latest revision provides additional focus on the five high impact areas of focus and rationale behind the chosen performance measures. Staff recommends approval of the revised strategic plan.

BOARD ACTION

I move to approve the 2017-2021 Higher Education Research Strategic Plan as submitted in Attachment 1.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

HIGHER EDUCATION RESEARCH STRATEGIC PLAN

(2017~~6~~-2021~~0~~)

Submitted by: Higher Education Research Council

State Board of Education Approved ~~February~~ December 2016~~5~~

EXECUTIVE SUMMARY

Research is being increasingly acknowledged by industry, government and education as a key factor in the future economic vitality of Idaho. The universities and colleges of Idaho's system of higher education understand the need for greater collaboration in order to be competitive in today's global environment. Recognizing the need to focus on and emphasize existing strengths and opportunities in Idaho's research community, the vice presidents ~~of~~ for research and economic development developed the following statewide strategic plan for research to ensure the greatest potential for achieving a vital and sustainable research base for Idaho. The strategic plan identifies the key research areas (basic, translational and clinical) that will become the focal points for research and economic development through partnering among academia, industry and government in science, technology, and creative activity.

Research is fundamental to the mission of a university due to its role in knowledge discovery and in providing new ideas for technology commercialization via patents, copyright, licenses and startup companies. University faculty who engage in research and creative activity are at the leading edge of their respective fields. Research also enhances the national reputation of the faculty and the universities. These faculty and their vibrant research programs attract the best graduate and undergraduate students by providing unique cutting-edge learning experiences in their research laboratories, studios, field sites and classrooms. On the most basic level, and also bolstered through collaborative, interdisciplinary and interprofessional research, such activities ~~research~~ strengthen~~s~~ a university's primary product — innovative, well-educated students ready to enter a competitive workforce.

Research is the foundation of a university's economic development role. The influx of research dollars from external grants and contracts creates new jobs at the university, along

with the attendant purchases of supplies, services, materials and equipment. The results of the research are new knowledge, new ideas, and new processes, which lead to patents, startup companies, more efficient businesses as well as a highly trained workforce prepared to tackle 21st century challenges.

Idaho's research universities have strengths and opportunities for economic development in 1) Energy Systems, 2) Natural Resource Utilization and Conservation, 3) ~~Biosciences~~Biomedical and Healthcare Sciences, 4) Novel Materials and 5) ~~Software~~ Systems Engineering and Cybersecurity.

By focusing collaborative efforts in these areas, the research universities will expand research success by:

- Helping Idaho institutions focus on their research strengths;
- Strengthening collaboration among Idaho institutions;
- Creating research and development opportunities that build relationships between universities and the private sector;
- Contributing to the economic development of the State of Idaho;
- Enhancing learning and professional development through research and scholarly activity – also by promoting interdisciplinary and interprofessional research; and
- Building and improving the research infrastructure of Idaho universities to meet current and future research needs.

This statewide Strategic Research Plan for Idaho Higher Education is a tool for identifying and attaining quantifiable goals for research and economic growth and success in Idaho. The plan will be reviewed and updated annually as needed amid the fast-changing pace of research discovery.

VISION

Idaho's public universities will be a catalyst and engine to spur creation of new knowledge, technologies, products and industries that lead to advances and opportunities for economic growth and enhance the quality of life in Idaho and the nation.

MISSION

The research mission for Idaho's universities is to develop a sustainable resource base by:

- Identifying, recruiting and retaining top faculty with expertise in key research areas;
- Building research infrastructure including facilities, instrumentation, connectivity and database systems to support an expanding statewide and national research platform;
- Attracting top-tier students to Idaho universities at the undergraduate and graduate levels and providing outstanding education and research opportunities that will prepare them to excel in future careers;
- Raising awareness among state, national and international constituencies about the research excellence and capabilities of Idaho's universities by developing and implementing targeted outreach, programs and policies; and
- Collaborating with external public, private, state and national entities to further the shared research agenda for the state, thereby promoting economic and workforce development and addressing the needs and challenges of the state, region and nation.

GOALS AND OBJECTIVES

Goal 1: Increase research at, and collaboration among, Idaho universities and colleges to advance ~~areas of~~ research strength~~s~~ and opportunit~~iesy~~ pertaining to critical issues in Idaho, while also providing a vision for national and global impact.

Objective 1.A: Ensure growth and sustainability of public university research efforts.

Performance Measure 1.A.1: Statewide amount of total annual research and development expenditures as reported in the National Science Foundation (NSF) Higher Education Research and Development Survey.
Benchmark: 10% increase per year.

Objective 1.B: Ensure the growth and sustainability of the existing collaborative research at the Center for Advanced Energy Studies (CAES).

Performance Measure 1.B.1: Statewide amount of U.S. Department of Energy (DOE) research and development expenditures as reported in the National Science Foundation (NSF) Higher Education Research and Development Survey.
Benchmark: 10% increase per year.

Objective 1.C: Expand joint research ventures among the state universities.

Performance Measure 1.C.1: Number of new fully sponsored project proposals submitted by an Idaho University that involve a subaward with another Idaho institution of higher education (in either direction).
Benchmark: 50% increase per year.

Performance Measure 1.C.2: Number of new fully sponsored project awards to an Idaho University that involve a subaward with another Idaho institution of higher education (in either direction). Benchmark: 30% increase per year.

Performance Measure 1.C.3: Establish/fund at least one HERC-directed research project per year which collaborates with one other Idaho university that directly addresses issues of particular importance to the State of Idaho.
Benchmark: 1 per year

Goal 2: Create research and development opportunities that strengthen the relationship between state universities and the private sector.

Objective 2.A: Increase the number of sponsored projects involving the private sector.

Performance Measure 2.A.1: Number of new sponsored projects involving the private sector.
Benchmark: 50% increase per year.

Goal 3: Contribute to the economic development of the State of Idaho.

Objective 3.A: Increase the amount of university-generated intellectual property introduced into the marketplace.

Performance Measure 3.A.1: Number of technology transfer agreements (as defined by AUTM [Association of University Technology Managers]).
Benchmark: 15% increase per year.

Performance Measure 3.A.2: Number of invention disclosures (including ~~plant~~ biomic varieties).
Benchmark: 1 for every $2M of research expenditures.

Performance Measure: 3.A.3: Amount of licensing revenues.
Benchmark: 10% increase per year.

Performance Measure: 3.A.4: Number of startup companies.
Benchmark: 10% increase per year.

~~*Objective 3.B: Increase the number of university startup companies (include startups outside of Idaho).*~~

~~Performance Measure 3.B.1: Number of startup companies. Benchmark: 10% increase per year.~~

Goal 4: Enhance learning and professional development through research and scholarly activity.

Objective 4.A: Increase the number of university and college students and staff involved in sponsored project activities.

Performance Measure 4.A.1: Number of undergraduate and graduate students paid from sponsored projects.
Benchmark: 20% increase per year.

Performance Measure 4.A.2: Percentage of baccalaureate students who ~~graduated in STEM disciplines and~~ had a research experience.
Benchmark: 20% increase per year.

Performance Measure 4.A.3: Number of faculty and staff paid from sponsored projects.
Benchmark: 20% increase per year.

RESEARCH OPPORTUNITIES

Idaho's research universities have developed statewide strengths in strategic research areas that have great potential to drive future economic growth and success. The criteria used to select these areas include: number of faculty and qualifications; peer-reviewed publications and impact; infrastructure (facilities, equipment, information technology, staff); external grant and contract funding; academic programs; student involvement; potential benefit to the State of Idaho; and technology transfer activity, including patents, licenses, and startup companies. By focusing collective research efforts and resources in these areas, the universities will be on the most efficient and effective route to research success and state-wide economic development. These high impact areas include 1) Energy Systems, 2) Natural Resource Utilization and Conservation, 3) ~~Biosciences~~Biomedical and Healthcare Sciences, 4) Novel Materials, and 5) ~~Software~~ Systems Engineering and Cybersecurity.~~Development.~~

Energy Systems: Energy is a critical driver of any economy. The projected increases in the population of the world and increases in the standard of living will produce severe strains on the ability to meet the demands of the next few decades. In addition, finite reserves of fossil fuels and pollution from their combustion requires that alternative sources of energy production be developed. The combination of natural resources in Idaho and presence of the Idaho National Laboratory makes energy a natural area of emphasis. Indeed, the three universities with research capabilities already have extensive research projects in this area. The Center for Advanced Energy Studies (CAES) is an example of the significant investment the three Idaho universities, the University of Wyoming, and the Idaho National Laboratory have made to develop expertise in nuclear science and engineering ~~and safety~~, ~~biofuel production from dairy waste~~materials science and engineering, energy systems design and analysis, fossil carbon conversion, geological systems and applications, ~~geothermal exploration, carbon sequestration,~~ energy policy and cybersecurity, and ~~energy efficient structures~~environmental and resource sustainability. ~~Intellectual property has already been generated from these products and is licensed.~~ Further growth in these areas not only takes advantage of the strong base but strongly supports a positive economic ~~development~~ impact through new markets for new product development

Natural Resource Utilization and Conservation: In the broad field of natural resource utilization and conservation, Idaho's universities have expertise in water resources, wildfire management and restoration, agriculture, forestry, recreation, and geophysics and geochemical detection, geographical information systems, and monitoring of groundwater pollutants. For example, university geologists, ecologists, and policy experts are collaborating on broad-ranging research projects that examine and predict the impact of climate change on Idaho's water resources. As water is essential to agriculture, recreation, the ecosystem, and human health, the universities have research strength in an area of tremendous societal and economic impact. Agriculture remains an important part of the economy of Idaho. Development of new ~~plant~~ biomic varieties with improved resistance to disease and climate change remain an area of importance as does the development of new feeds for domestic fish production. The often competing

demands for preservation and exploitation put on the environment require understanding of the various ecosystems in the state and region as well as societal, human health, and economic impacts of policy decisions. Recent national research imperatives, as particularly captured in National Science Foundation's Innovation at the Nexus of Food, Energy, and Water Systems (INFEWS) foundation-wide program and the Department of Energy's report Water-Energy Nexus: Challenges and Opportunities increasingly require multi-sectoral, multi-disciplinary approaches to problems in natural resource utilization and conservation. The depth and breadth of relevant research expertise in the biophysical, rural health and social science fields within Idaho's universities underscores an opportunity that a national emphasis on food, energy, and water security provides. Provided that enhanced coordination and collaboration between Idaho's universities can be successfully executed, we are particularly well-placed to exhibit national and international leadership at the nexus of food, energy, water system research. The future economic success of the state will rely on a deep understanding of these processes.

~~*Biosciences*~~*Biomedical and Healthcare Sciences:* Idaho's universities have well-established research programs in selected areas of ~~biosciences~~biological and biomedical sciences. University microbiologists and informatics experts, for example, study real-time change in pathogenic microorganisms that enable them to become resistant to drugs and chemical toxins thus resulting in worsening human disease and mortality rates. These effects are not restricted to humans, domestic and wild animals as well as food plants and trees are experiencing the same phenomena. Also, weeds are becoming resistant to herbicides. These phenomena are having a significant negative impact on Idaho's agriculture and forests. Further stress is being put on these important commercial sectors through climate variability. Research in these areas is critical for preserving important economic sectors of Idaho's economy while addressing future global needs.

The public health infrastructure in rural Idaho is not well understood but is potentially the most fragile aspect of the state's health care system. The rural environment, especially typical in Idaho where agriculture, manufacturing, and fishing are important or dominant parts of the economy, presents extraordinary threats to health. Agriculture brings the use of pesticides and herbicides as well as heavy and potentially dangerous machinery. Manufacturing – depending on the type – is a consistently hazardous industry, and employees involved in fishing and forestry are at much higher risks of trauma. Healthcare and in particular a focus on rural health, provides significant opportunities for economic development in Idaho. Partnerships with private entities in the healthcare industry, funding though the National Institutes of Health and other federal agencies utilize the natural laboratory of Idaho's rural population. Idaho's universities' contributions towards this emerging area of scholarship will add to the global competitiveness of the United States and the State.

Novel Materials: The global materials industry is worth an estimated $550 billion, conservatively. Materials revolutionize our lives by offering advanced performance and new possibilities for design and usage. For example, the market for biocompatible materials has grown from a few to $60B in the past decade. Market size is growing for materials in emerging areas such photonic materials, electronic and dielectric materials, functional coatings, and green materials. Materials research in Idaho is conducted by a

wide range of scientists in diverse fields. Across the state, faculty members in Biology, Chemistry, Geosciences, Physics, Electrical Engineering, Mechanical Engineering , Nuclear Engineering and Materials Science and Engineering conduct research on improving and developing new materials. Current materials researchers in Idaho cover a broad spectrum of specializations, including semiconductor device reliability, microelectronic packaging, shape memory alloys, DNA machinery, environmental degradation, materials for extreme environments, biomaterials and bio-machinery, materials characterization, and materials modeling. Nanoscale materials and devices, functional materials and their uses and materials for energy applications are a focus of research throughout the state. These areas of research are highly synergistic with local industries and the Idaho National Laboratory (INL). Access to materials characterization equipment and processing laboratories has resulted in collaborations with small businesses and start-up companies.

~~Software Development~~Systems Engineering and Cybersecurity: Device control ~~and ,~~ information management, and cybersecurity are an essential part of 21st century life and, therefore, are an important part of educational requirements. For instance, large amounts of sensitive data are collected, processed, and stored electronically but must be accessed and moved in order to have any impact. In fact, many systems are computer controlled through networks. These include such things as the electric transmission grid and transportation in major cities. The universities are beginning to develop research expertise in software development and data management lifecycle design and operations and secure and dependable system design and operations. This area provides a significant area of opportunity for positive economic ~~development~~ impact in Idaho, partnerships with the Idaho National Laboratory, and in ~~as well as for~~ improving the global competitiveness of the United States. There are already a significant number of firms in Idaho whose interests are in software development for device control, information management and processing. In addition, many of the major research projects being undertaken in the region by various state and federal agencies as well as the universities require the handling of significant amounts of data in a secure and dependable fashion. ~~Each university has some expertise in this area but not a critical mass.~~ Currently, research funding in the universities from private and governmental sources is limited by the number of qualified personnel. In addition, within Idaho there is a high demand for graduates at all levels in computer science, hence workforce development in these areas should be a matter of urgency.

EXTERNAL FACTORS: IDAHO RESEARCH ADVANTAGES~~, THREATS,~~AND CHALLENGES

There are unique advantages and challenges to research in Idaho. This document seeks to provide guidance on building upon the advantages present in Idaho and address the challenges through the goals in this strategic plan.

Research Advantages

The Idaho National Laboratory (INL) and the Center for Advanced Energy Studies: Idaho is fortunate to be home to the Idaho National Laboratory, one of only ~~20~~ 17 U.S. Department of Energy national laboratories in the U.S. The INL's unique history and expertise in nuclear energy, environmental sciences and engineering, alternative forms of energy, and biological and geological sciences and related fields provides an excellent opportunity for research collaboration with Idaho's university faculty in the sciences, engineering, business and other fields.

The Center for Advanced Energy Studies (CAES), established at the request of the U.S. Department of Energy, is a public-private partnership that includes Idaho's research universities (~~–~~Boise State University, Idaho State University, and the University of Idaho)~~–~~, the University of Wyoming, and the Battelle Energy Alliance (BEA), which manages the INL. The CAES partners work together to create unique educational and research opportunities that blend the talents and capabilities of Idaho's universities and the INL. A 55,000 square-foot research facility in Idaho Falls supports the CAES energy mission with laboratory space and equipment for students, faculty, and INL staff in collaborative research projects. The State of Idaho ~~invested~~ invests $3~~.2~~M per year in direct support of the three Idaho research universities~~ during FY09 and FY10. During these first two years, the CAES partners won $24M in external support for CAES research that has contributed to both scientific advances and economic development in the state and region~~.

Natural Resources: Idaho's beautiful natural resources are well known to fishermen, hunters, skiers, and other outdoor enthusiasts. Through its rivers, forests, wildlife, geological formations, and rangelands, Idaho itself is a unique natural laboratory for geological, ecological, and forestry studies. Idaho is home to some of the largest tracts of remote wilderness in the lower 48 states. In addition, the proximity of Yellowstone National Park and the Great Salt Lake provide additional one of a kind opportunities for ecology and geology research.

Small Population: Idaho's relatively small population of 1.~~4~~ 6 million people enables every group in the state to be included in research surveys, providing more accurate information than a sampling of only some groups.

Intrastate Networks: The existing networks within the state, including agricultural extension services and rural health networks, provide a foundation for collecting research data from across the state, and rapidly implementing new policies and practices as a result of research discoveries.

Research ~~Threats~~Challenges

The goals set forth in this strategic plan are specifically designed to address challenges in Idaho. These challenges are identified below and include a description of the challenge and the goal from this strategic plan that addresses that specific challenge.

~~*Economy:* The current economic recession is the most severe downturn most of us have seen in our lifetimes. The immediate effects of this recession on university research are state-wide budget cuts, with results that include hiring freezes, loss of university faculty and staff, higher teaching loads for faculty (with correspondingly less time for research), and delayed improvements in research infrastructure, including major equipment.~~

~~However, it is not only the current recession which threatens Idaho university research. Idaho has relatively few industries, and seems to attract fewer new companies and industries than other states. When one major sector suffers, as agriculture is at the present time, the entire state suffers. As state institutions, the research universities suffer. Over time, a relatively slow state economy leads to at least two problems: 1) recruitment and retention of faculty, who go to institutions offering higher salaries, more startup money, and better infrastructure; and 2) aging infrastructure, keeping Idaho researchers behind their national peers in terms of having the most up-to-date facilities and equipment. Without proper infrastructure, Idaho research faculty is at a distinct disadvantage in competing with peers across the nation for federal grants.~~

Lack of Coordination Among Universities In Advancing Research and Economic Development (technology transfer): By and large the research universities have not coordinated and shared their technology transfer and economic development activities among themselves. This not only decreases each university's competitiveness at the national and state level but also increases the costs for achieving a particular goal. There is some redundancy in programs, services and infrastructure between the universities. This duplication both limits the success that any one university can achieve and increases the cost.

Historical Competition Between Universities: One of the greatest problems with growing the research and economic development enterprise within the Idaho university arena has been the competitiveness between research universities. This problem existed at all levels within the universities themselves, extended through university administration to the state level, and was even prevalent in the press. While competition between the universities is to be expected when all are competing for a finite pot of money within the state and is even healthy at some level, the level of competition was counterproductive. The real competition that Idaho universities face is other universities in the United States when it comes to research dollars and attracting faculty and students. Economic development is also not a competition between the state universities but rather a competition with other states.

Goal 1 is designed to remedy these two challenges by "increas(ing) research at, and collaboration among Idaho universities and colleges to advance research strengths and opportunities pertaining to critical issues in Idaho, while also providing a vision for national and global impact."

Competition from Other Universities: In research, university faculty competes nationally for grant funds from federal agencies such as the National Science Foundation,

Department of Energy, and the ~~National Institutes of Health~~Department of Health and Human Services. Many other states' universities are well ahead of Idaho's universities in terms of state funding per student, patent royalty income, endowments, etc., and are able to move ahead at a faster pace, leaving Idaho universities further behind as time goes on.

Goals 1 and 2 are designed to make Idaho's research universities more competitive nationally and globally through collaboration with each other and by "(strengthening) the relationship between state universities and the private sector."

University Culture: Each of Idaho's research universities aspires to greater levels of achievement in research and creative activity, yet many faculty at each of the universities are not fully engaged on a national level in their respective fields. This is changing for the better under new leadership and with new research-active faculty hires at each institution, but these cultural differences remain, resulting in discomfort with change aimed at making the universities more nationally competitive.

While Goal 1 urges the researchers at Idaho's universities to keep a national and global vision for their research, Goal 4 aims to enhance the research capabilities of faculty by "(enhancing) learning and professional development."

Private Sector Support: Idaho has very little high-technology industry within its borders. This reduces the potential for developing an applied research initiative within the universities that, in many states, provides one important arm of economic development and technology transfer. This also means that it is much harder to develop those private/public partnerships that provide the universities with additional capital to construct research are technology transfer facilities.

The private sector plays a critical role in research. Goal 2 states that we will "create research and development opportunities that strengthen the relationship between state universities and the private sector."

Fragmented Economic Development Initiatives: There are seemingly too many economic development initiatives in Idaho and they are not well coordinated. It is imperative that state, university, and community initiatives work together toward common and agreed to goals. As it is, little progress is being made towards developing an economic strategy for the state that includes the research universities and little money has been secured to drive the economic development process. In fact, it is not uncommon to find that different entities in Idaho are competing against each other.

Positive economic impact is the result of well-organized and collaborative research. It requires strategic planning and execution. Goal 3 indicates that Idaho's research universities focus on "(contributing) to the positive economic impact of the State of Idaho."

Research Challenges

Attraction and Retention of Faculty and Students: The ability to attract and retain faculty who contribute to the research enterprise is critically dependent on nationally-competitive salaries, the quality of the student body, and the condition of the research and support facilities and the availability of faculty with related interests. Declining state investment in the research universities which results in non-competitive salaries, non-existent or below average raises, decaying or inadequate infrastructure and lack of administrative support discourages top-tier faculty from applying for and accepting open positions and encourages the best faculty to leave. Similarly, non-competitive graduate student stipends keep the best students from accepting positions in the Idaho universities.

Vastness of State and Distances Between Schools: Although the distances between the research universities is not much different from those in other western states, the topography of Idaho increases the time and cost required for travel well beyond those experienced in other states. This fact discourages collaborations between faculty members and administrators at the different research universities as well as between universities and other entities within Idaho. Although video conferencing can alleviate this problem, there is limited capability at each university. There is also the continuing problem of finding funds to pay for the necessary connectivity between the universities as well as to the world outside of Idaho.

Aging Infrastructure: Modern research requires access to sophisticated and precision instrumentation which, in turn, requires a stable and controlled environment in order to operate. The three research universities in Idaho have limited numbers of these facilities or even space that could be economically converted into modern laboratory space. At present all laboratory space—modern or otherwise—is occupied. This means that there is little room for growing the research enterprise and certainly no space to accommodate new faculty or major new projects.

Data Issues: There is very little long-term, quality data available on the research enterprise or economic development. The data that exists are scattered among various entities in a variety of formats thus make it hard to centralize and use. Furthermore, there is no one entity responsible for collecting, analyzing and dispersing it. This is also true for many of the sectors that will strongly influence the future economic impact of Idaho. While there are large amounts of data that have been collected on watersheds, forests and agricultural operations and the environment—to name a few—they are distributed across a number of agencies and individuals within those agencies. Worse yet, much of this information is lost every time a researcher retires.

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~~*Lack of National and International Competitiveness:* While each Idaho research university has faculty members that can successfully compete on the national and international scene for research funds, no one university has the necessary reputation, breadth of faculty expertise or facilities to compete for the large projects that are necessary to establish a national or international reputation and substantially grow its research funding. This becomes less relevant if the universities work together and better coordinate their research activities. It is more than simply agreeing to cooperate on developing projects; it must extend to each university developing complementary research programs so that, taken together, they can successfully compete within any university in the country in selected areas.~~

~~*Lack of Diversity:* The population of faculty, staff and students at each of the three research universities, like that of the State, is fairly homogeneous. This lack of diversity—be it cultural, socio-economic or ethnic—hurts the universities and surrounding communities in several different ways. First, it makes recruitment of students, faculty and staff from under-represented groups more difficult. Second, it is noted on accreditation~~

~~reports and, as such, is a negative reflection on the institution. Finally, it limits the competitiveness of the university in several federal agencies where plans for including under-represented groups in the program are a key element of the proposal.~~

Conclusion

This statewide Strategic Research Plan for Idaho Higher Education provides a framework to mitigate these external challenges and help Idaho institutions continue to focus on their research strengths. Overcoming the challenges discussed in this document will require enhanced cooperation between the functional groups at each Idaho university, fueled by a desire to work together towards the common goal of improving Idaho's economy for future generations.

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