

**WORK SESSION**  
**MAY 13, 2020**

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**SUBJECT**

Board Retreat – Facilitated Strategic Planning Discussion

**APPLICABLE STATUTE, RULE, OR POLICY**

Idaho Code § 67-1903 – Strategic Planning

**BACKGROUND/DISCUSSION**

The focus of the retreat is strategic goal setting for the state’s K-20 system. Dr. David Barkan has been engaged to facilitate this effort. The facilitated discussion will center on the Board’s K-20 strategic plan to help the Board achieve its goals. In particular, the Board will explore the following:

- Is the Board’s strategic plan serving its intended purpose?
- What does the Board really want from its strategic plan?
- How does the Board set and achieve its goals?

This strategic goal setting will then inform a discussion about how the Board imagines the future of education in a post COVID-19 environment.

A specific focus will be Board advocacy for higher education. COVID-19 has wreaked havoc on the institutions’ budgets, workforce and instruction and student life. Fall 2020 enrollment yield is anyone’s guess, but national estimates indicate a possible double-digit decline. Historically there has been an inverse relationship between the economy and college enrollment. However, some education leaders are questioning whether that countercyclical behavior will hold true this time. Apprehension around health and safety combined with massive unemployment and economic losses could cause more students to stay close to home. Maybe they will enroll at a local institution or take a gap year. Worse yet, maybe they just won’t go at all. Yet, we know that higher education and an educated workforce will be critical to our economic recovery.

**IMPACT**

Board discussion could inform future revisions to its strategic plan.

**ATTACHMENTS**

- Attachment 1 – Board K-20 Strategic Plan 2020 - 2025
- Attachment 2 – State Strategic Planning Requirements
- Attachment 3 – State Strategic Planning Definitions

**STAFF COMMENTS AND RECOMMENDATIONS**

Senior Board staff will be in attendance to answer any questions that may arise during the retreat.

**BOARD ACTION**

This item is for informational purposes only.



Idaho K-20 Public Education - Strategic Plan



**GOAL 1: EDUCATIONAL SYSTEM ALIGNMENT –**

Ensure that all components of the educational system are integrated and coordinated to maximize opportunities for all students.

- **Objective A: Data Access and Transparency** - Support data-informed decision-making and transparency through analysis and accessibility of our public K-20 educational system.
- **Objective B: Alignment and Coordination** – Ensure the articulation and transfer of students throughout the education pipeline (secondary school, technical training, postsecondary, etc.).

**GOAL 2: EDUCATIONAL READINESS –**

Provide a rigorous, uniform, and thorough education that empowers students to be lifelong learners and prepares all students to fully participate in their community and postsecondary and work force opportunities by assuring they are ready to learn at the next educational level.

- **Objective A: Rigorous Education** – Deliver rigorous programs that challenge and prepare students to transition through each level of the educational system.
- **Objective B: School Readiness** – Explore opportunities to enhance school readiness

**GOAL 3: EDUCATIONAL ATTAINMENT –**

Idaho's public colleges and universities will award enough degrees and certificates to meet the education and forecasted workforce needs of Idaho residents necessary to survive and thrive in the changing economy.

- **Objective A: Higher Level of Educational Attainment** – Increase completion of certificates and degrees through Idaho's educational system.
- **Objective B: Timely Degree Completion** – Close the achievement gap, boost graduation rates and increase on-time degree completion through implementation of the Game Changers (structured schedules, math pathways, co-requisite support).
- **Objective C: Access** - Increase access to Idaho's robust educational system for all Idahoans, regardless of socioeconomic status, age, or geographic location.

**GOAL 4: WORKFORCE READINESS –**

The educational system will provide an individualized environment that facilitates the creation of practical and theoretical knowledge leading to college and career readiness.

- **Objective A: Workforce Alignment** – Prepare students to efficiently and effectively enter and succeed in the workforce.
- **Objective B: Medical Education** – Deliver relevant education that meets the health care needs of Idaho and the region.



**FY2021-2026**  
**Idaho K-20 Public Education - Strategic Plan**

*An Idaho Education: High Potential – High Achievement*

**MISSION STATEMENT**

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.

**VISION STATEMENT**

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

**GOAL 1: EDUCATIONAL SYSTEM ALIGNMENT** – Ensure that all components of the educational system are integrated and coordinated to maximize opportunities for all students.

**Objective A: Data Access and Transparency** - Support data-informed decision-making and transparency through analysis and accessibility of our public K-20 educational system.

**Performance Measures:**

- I. **Development of a single K-20 data dashboard and timeline for implementation.**

**Benchmark:** Completed by FY2020<sup>Error! Bookmark not defined.</sup>

**Objective B: Alignment and Coordination** – Ensure the articulation and transfer of students throughout the education pipeline (secondary school, technical training, postsecondary, etc.).

**Performance Measures:**

- I. **Percent of Idaho community college transfers who graduate from four-year institutions.**

**Benchmark:** 25%<sup>Error! Bookmark not defined.</sup> or more

- II. **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%<sup>3</sup>

4 year – less than 20%<sup>3</sup>

**GOAL 2: EDUCATIONAL READINESS** – Provide a rigorous, uniform, and thorough education that empowers students to be lifelong learners and prepares all students to fully participate in their community and postsecondary and workforce opportunities by assuring they are ready to learn for the next educational level.

**Objective A: Rigorous Education** – Deliver rigorous programs that challenge and prepare students to transition through each level of the educational system.

**Performance Measures:**

**I. Percentage of students scoring at grade level on the statewide reading assessment (broken out by grade level, K-3).**

**Benchmark:** TBD (Benchmark will be set after Spring 2020 IRI results received)

**II. Percentage of students meeting proficient or advance on the Idaho Standards Achievement Test (broken out by subject at each transition grade level, 5, 8, high school).**

**Benchmark:**

Idaho Standards Achievement Test	by 2022/ESSA Plan Goal
Math	
5th Grade	58.59%
8th Grade	57.59%
High School	53.30%
ELA	
5th Grade	68.04%
8th Grade	67.64%
High School	73.60%
Science	
5th Grade	FY21 Baseline
High School	FY21 Baseline

**III. High School Cohort Graduation rate.**

**Benchmark:** 95%<sup>3</sup> or more

**IV. Percentage of Idaho high school graduates meeting college placement/entrance exam college readiness benchmarks.**

**Benchmark:** SAT – 60%<sup>1</sup> or more

ACT – 60%<sup>1</sup> or more

**V. Percent of high school graduates who participated in one or more advanced opportunities.**

**Benchmark:** 80%<sup>1</sup> or more

**VI. Percent of dual credit students who graduate high school with an Associates Degree.**

**Benchmark:** 3%<sup>2</sup> or more

**VII. Percent of high school graduates who enroll in a postsecondary institution:**

Within 12 months of high school graduation.

**Benchmark:** 60%<sup>3</sup> or more

Within 36 months of high school graduation.

**Benchmark:** 80%<sup>4</sup> or more

**Objective B: School Readiness** – Explore opportunities to enhance school readiness.

**Performance Measures:**

**I. Percentage of students scoring at grade level on the statewide reading assessment during the Fall administration in Kindergarten.**

**Benchmark:** TBD (Benchmark will be set after Spring 2020 IRI results received)

**II. Number of students participating in early readiness opportunities facilitated by the state.**

**Benchmark:** TBD

**GOAL 3: EDUCATIONAL ATTAINMENT** – Ensure Idaho’s public colleges and universities will award enough degrees and certificates to meet the education and forecasted workforce needs of Idaho residents necessary to survive and thrive in the changing economy.

**Objective A: Higher Level of Educational Attainment** – Increase completion of certificates and degrees through Idaho’s educational system.

**Performance Measures:**

**I. Percent of Idahoans (ages 25-34) who have a college degree or certificate requiring one academic year or more of study.**

**Benchmark:** 60%<sup>5</sup> or more

**II. Total number of certificates/degrees produced, by institution per year:**

- a) Certificates
- b) Associate degrees
- c) Baccalaureate degrees

Total number of certificates/degrees produced, by institution annually	Preliminary, pending institution review
Certificates of at least one year	1860
College of Eastern Idaho	150
College of Southern Idaho	160
College of Western Idaho	550

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**ATTACHMENT 1**

North Idaho College	675
Boise State University	0
Idaho State University	300
Lewis-Clark State College	25
University of Idaho	0
<b>Associate degrees</b>	<b>3925</b>
College of Eastern Idaho	200
College of Southern Idaho	950
College of Western Idaho	990
North Idaho College	750
Boise State University	160
Idaho State University	485
Lewis-Clark State College	390
University of Idaho	0
<b>Baccalaureate degrees</b>	<b>8280</b>
Boise State University	4350
Idaho State University	1375
Lewis-Clark State College	705
University of Idaho	1850

**III. 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)

**Benchmark:** (2 year Institutions) 75%<sup>3</sup> or more  
(4 year Institutions) 85%<sup>3</sup> or more

**IV. Percent of full-time first-time freshman graduating within 150% of time or less (2yr and 4yr).**

**Benchmark:** 50%<sup>3</sup> or more (2yr/4yr)

**Objective B: Timely Degree Completion** – Close the achievement gap, boost graduation rates and increase on-time degree completion through implementation of the Game Changers (structured schedules, math pathways, co-requisite support).

**Performance Measures:**

**I. Percent of undergraduate, degree-seeking students completing 30 or more credits per academic year at the institution reporting.**

**Benchmark:** 50% or more

**II. Percent of new degree-seeking freshmen completing a gateway math course within two years.**

**Benchmark:** 60% or more

**III. Median number of credits earned at completion of Associate's or Baccalaureate degree program.**

**Benchmark:** Transfer Students: 69/138<sup>2</sup> or less

**Benchmark:** non-transfer students: 69/138<sup>2</sup> or less

**Objective C: Access** - Increase access to Idaho's robust educational system for all Idahoans, regardless of socioeconomic status, age, or geographic location.

**Performance Measures:**

**I. Annual number of state-funded scholarships awarded and total dollar amount.**

**Benchmark:** 3,000<sup>6</sup> or more, \$16M<sup>7</sup> or more

**II. Proportion of postsecondary graduates with student loan debt.**

**Benchmark:** 50% or less<sup>8</sup>

**III. Percent of students who complete the Free Application for Federal Student Aid (FAFSA).**

**Benchmark:** 60% or more

**IV. Percent cost of attendance (to the student)**

**Benchmark:** 96%<sup>4</sup> or less of average cost of peer institutions

**V. Average net cost to attend public institution.**

**Benchmark:** 4-year institutions - 90% or less of peers<sup>4</sup> (using IPEDS calculation)

**VI. Expense per student FTE**

**Benchmark:** \$20,000<sup>4</sup> or less

**VII. Number of degrees produced**

**Benchmark:** 15,000<sup>3</sup> or more

**GOAL 4: WORKFORCE READINESS** – Ensure the educational system provides an individualized environment that facilitates the creation of practical and theoretical knowledge leading to college and career readiness.

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

**Performance Measures:**

**I. Percentage of students participating in internships.**

**Benchmark:** 10%<sup>4</sup> or more

- II. **Percentage of undergraduate students participating in undergraduate research.**  
**Benchmark:** Varies by institution<sup>4</sup>
- III. **Percent of non - STEM to STEM baccalaureate degrees conferred in STEM fields (CCA/IPEDS Definition of STEM fields).**  
**Benchmark:**
- IV. **Increase in postsecondary programs tied to workforce needs per year.**  
**Benchmark:** 10<sup>9</sup> or more

**Objective B: Medical Education** – Deliver relevant education that meets the health care needs of Idaho and the region.

**Performance Measures:**

- I. **Number of University of Utah Medical School or WWAMI graduates who are residents in one of Idaho's graduate medical education programs.**  
**Benchmark:** 8<sup>10</sup> graduates at any one time
- II. **Idaho graduates who participated in one of the state sponsored medical programs who returned to Idaho.**  
**Benchmark:** 60%<sup>11</sup> or more
- III. **Percentage of Family Medicine Residency graduates practicing in Idaho.**  
**Benchmark:** 60%<sup>11</sup> or more
- IV. **Percentage of Psychiatry Residency Program graduates practicing in Idaho.**  
**Benchmark:** 50%<sup>11</sup> or more
- V. **Medical related postsecondary programs (other than nursing).**  
**Benchmark:** 100<sup>9</sup> or more

**KEY EXTERNAL FACTORS**

Idaho public universities are regionally accredited by the Northwest Commission on Colleges and 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 provide a framework for continuous improvement within the postsecondary 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.

### EVALUATION PROCESS

The Board convenes representatives from the institutions, agencies, and other interested education stakeholders to review and recommend amendments to the Board's Planning, Policy and Governmental Affairs Committee regarding the development of the K-20 Education Strategic Plan. Recommendations are then presented to the Board for consideration in December. Additionally, the Board reviews and considers amendments to the strategic plan annually, changes may be brought forward from the Planning, Policy, and Governmental Affairs Committee, Board staff, or other ad hoc input received during the year. This review and re-approval takes into consideration performance measure progress reported to the Board in October.

Performance towards meeting the set benchmarks is reviewed and discussed annually with the State Board of Education in October. The Board may choose at that time to direct staff to change or adjust performance measures or benchmarks contained in the K-20 Education Strategic Plan. Feedback received from the institutions and agencies as well as other education stakeholders is considered at this time.

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<sup>1</sup> Benchmark is set based on the increase needed to meet the state educational attainment goal (60%).

<sup>2</sup> Benchmark is set based on analysis of available and projected resources (staff, facilities, and funding).

<sup>3</sup> Benchmark is set based on an analysis of historical trends combined with the desired level of achievement and available and projected resources (staff, facilities and funding). Desired level of achievement is based on projected change needed to move the needle on the states 60% educational attainment goal.

<sup>4</sup> Benchmark is set based on an analysis of historical trends combined with the desired level of achievement and available and projected resources (staff, facilities and funding).

<sup>5</sup> Benchmark is set based on the Georgetown Study of workforce needs in Idaho in 2020 and beyond.

<sup>6</sup> Benchmarks are set based on an analysis of historical trends combined with desired level of achievement.

<sup>7</sup> 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.

<sup>8</sup> 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.

<sup>9</sup> New measure.

<sup>10</sup> Benchmark is set based on projected and currently available state resources.

<sup>11</sup> Benchmark is set based on an analysis of historical trends combined with the desired level of achievement and available and projected resources (staff, facilities and funding). Desired level of achievement is set at a rate greater than similar programs in other states.

## ***Statutory Requirements***

### ELEMENTS OF STRATEGIC PLANS

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Per Idaho Code 67-1903(1), each agency's strategic plan should, at a minimum, contain the following:

1. A comprehensive outcome-based vision or mission statement covering the major divisions and core functions of the agency;
2. Goals for the major divisions and core functions of the agency;
3. Objectives and/or tasks that indicate how the goals are to be achieved;
4. Performance measures, developed in accordance with section 67-1904, Idaho Code, that assess the progress of the agency in meeting its goals in the strategic plan, along with an indication of how the performance measures are related to the goals in the strategic plan;
5. Benchmarks or performance targets for each performance measure for, at a minimum, the next fiscal year, along with an explanation of the manner in which the benchmark or target level was established; and
6. An identification of those key factors external to the agency and beyond its control that could significantly affect the achievement of the strategic plan goals and objectives.

### OTHER STRATEGIC PLAN REQUIREMENTS

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The strategic plan should also meet the following additional requirements outlined in Idaho Code 67-1903(2)-(6):

- Covers a period of not less than four years forward including the fiscal year it is submitted and is updated annually.
- Serves as a foundation for developing performance report information.
- Provides the opportunity to consult with appropriate members of the Legislature and other stakeholders.
- Minimize the number of printed copies by using electronic versions where possible.

#### **Cybersecurity Plans**

As required by Executive Order 2017-02, the strategic plan should also include an update on the agency's adoption of the National Institute of Standards and Technology (NIST) Cybersecurity Framework and implementation of Center for Internet Security (CIS) Controls. Agencies were ordered to implement the first five CIS Controls by June 30, 2018. An update on these efforts may be incorporated into the framework of the agency's strategic plan if the efforts fit within an agency goal, or may be included as an addendum.

### Red Tape Reduction Act

As instructed in the Red Tape Reduction Act (*Executive Order 2019-02*), each state agency is required to designate a Rules Review Officer (RRO) “to undertake a critical and comprehensive review of the agency’s administrative rules to identify costly, ineffective, or outdated regulations.”

Each agency shall incorporate into its strategic plan a summary of how it will accomplish this effort, including any associated goals, objectives, tasks, or performance targets. This information may be included as an addendum.

Progress must also be reported annually through the agency’s performance report under the profile of cases managed (see Part I-4 below). The following items must be reported:

- Number of Chapters of Administrative Code
- Number of Words in Administrative Code (Excluding Table of Contents and Index)
- Number of Restrictions in Administrative Code (Use of “shall,” “must,” “may not,” “prohibited,” and “required.”)

## ELEMENTS OF PERFORMANCE REPORTS

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Per Idaho Code 67-1904(1), agency performance reports should contain the following elements:

### Part I

1. Agency overview provides a brief description of the agency and may include the agency’s governance structure, the number of employees, number and location of offices, and a brief history of the agency.
2. Core functions/Idaho Code that describe the agency’s primary operations and corresponding statutory authority.
3. Fiscal year revenue and expenditure information for the prior four fiscal years broken down by revenue source and type of expenditure. This may include informative breakdowns such as amounts from different revenue sources or types of expenditures.
4. Profile of cases managed and/or key services provided for the prior four fiscal years including the most recently completed fiscal year. Each agency may determine the items to be reported.

### Part II

1. Performance measures from the agency’s strategic plan that clearly capture its progress in achieving its goals. The measures reported for each year should be taken from the strategic plan for the prior fiscal year. No more than 10 key quantifiable performance measures may be included for any given fiscal year. Performance measures should be organized by goal to clearly indicate which performance measures demonstrate the agency’s progress in achieving each goal.

2. The actual measured results for each performance measure for the prior four fiscal years. If actual results are not available because it is a new measure, it must be stated.
3. Benchmarks or performance targets that identify the desired or intended level of performance the agency established in the strategic plan for each performance measure for the prior four fiscal years. Benchmarks or performance targets must also be provided for the current fiscal year, as established in the agency's current strategic plan.
4. Explanatory notes which provide context important for understanding the measures and the results, and any other qualitative information useful for understanding agency performance.
5. Attestation signed by the agency director affirming that the data reported has been internally assessed for accuracy and is deemed to be correct.

#### **Licensing Freedom Act**

The Licensing Freedom Act of 2019 (Executive Order 2019-01) aims to reduce licensing requirements and enhance transparency around state licensure. Agencies subject to this executive order must report on the number of applicants denied licensure or license renewal and the number disciplinary actions taken against license holders using the format outlined in Appendix D of this guide.

#### **OTHER PERFORMANCE REPORT REQUIREMENTS**

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The performance report should also meet the following additional requirements outlined in Idaho Code 67-1904(2)-(10):

- Information is reported in a consistent format determined by the Division of Financial Management (DFM) to allow for easy review of the information reported.
- Agency uses the information for internal management purposes.
- Agency maintains reports and four years of documentation to support the data reported.
- Agency submits the report to DFM and the Legislative Services Office (LSO) by September 1 each year.
- DFM publishes the report each year as part of the executive budget.
- LSO may use the information in its budget publication.
- Agency presents the information to legislative germane committees.
- Germane committees may authorize alternative forms of measurement or request increases in the number of measures.
- Minimize the number of printed copies by using electronic versions where possible.

## *Definitions, Development Guides, and Examples*

The following definitions and development guides are provided to help you with the development of your strategic plan. Understanding the function of each component and their interrelationships can improve strategic planning. Some of these components are also used when reporting on the results of agency action in your performance report.

Effective strategic plans use the agency's **mission** or **vision statement** as a framework for developing agency **goals**. Likewise, these goals should drive the **objectives and/or tasks** that are established for the upcoming fiscal year. Good **performance measures** provide quantitative feedback that helps an agency identify whether the objectives being undertaken are leading to goal achievement. As actual performance results are compared to desired results, or **performance targets**, substandard outcomes may prompt new or modified objectives that are needed to accomplish agency goals. Successful outcomes may suggest that higher results are possible and prompt raising performance targets. **External factors** should be considered when making these assessments. Any needed changes can then be incorporated into the following year's strategic plan, creating a cycle of ongoing improvement.

Examples are also provided below for each strategic plan component. If, after reading this guide, you have questions about how these components should be applied to your strategic plan, contact your DFM analyst.

### MISSION STATEMENT

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#### **Definition**

The agency mission statement concisely identifies what the agency does, why it does it, and for whom it does it. The mission reminds the public, elected officials, and agency personnel of the agency's unique purposes.

#### **Development Guides**

The mission statement describes the agency's role in the state and is the common thread connecting the agency's organizational structure and its activities. The mission of the agency may link to several state functional areas depending on the nature of the agency. All employees should be able to identify their working relationship to this defined mission. The mission statement must be clearly understandable to the public and should at least answer the following questions:

1. Who are we as an organization and who do we serve?
2. Why does our agency exist and what basic problems does it address?
3. What makes our purpose unique?
4. Is the mission in harmony with the agency's enabling statute?

A mission statement should be developed by the agency and succinctly state its purposes using enabling statutes or constitutional provisions to identify the reasons for its work. The agency should examine other relevant sources such as board policies and program descriptions. Because a concise mission statement can provide focus, the statement should be no more than one paragraph in length. An agency may choose to have both a mission statement and vision statement, but only one of these is required.

**Examples**

- *Career and Technical Education*: Prepare Idaho youth and adults for high-skill, in-demand careers.
- *Idaho Commission on the Arts*: Provide quality experiences in the arts for all Idahoans.
- *Idaho Transportation Department*: Your Safety. Your mobility. Your economic opportunity.
- *PERSI*: To provide a sound retirement system and high-quality service and education to help Idaho public employees build a secure retirement.

VISION STATEMENT

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**Definition**

The vision statement is an inspiring picture of a preferred future. The vision statement provides the reader with a clear description of how the agency sees the future should its goals and objectives be achieved.

**Development Guides**

There are no clear guidelines for the development of the agency’s vision statement except for the legislative direction that the statement be “outcome-based.” This implies that the statement contains provisions which can be objectively measured to determine whether the agency is advancing toward its vision. The following questions may assist agencies in the development of a vision statement:

1. What difference will we make for the people we serve?
2. What does our ideal future look like?
3. How will our agency change to meet the changing needs of our clients? How will the nature of the way we deliver products or services change in the future?

The vision statement should be brief but provide a realistic view of the future of the agency and the people it serves. It should strengthen and unify the agency and guide goals, priorities, and decisions. An agency may choose to have both a mission statement and vision statement, but only one of these is required.

**Examples**

- *Idaho Military Division*: Always ready, always there.
- *Office of Drug Policy*: An Idaho free from the devastating social, health, and economic consequences of substance abuse.
- *Idaho Lottery*: Become the highest performing jurisdiction in North America.

## GOALS

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### Definition

Goals specify how the agency will achieve its mission or realize its vision. They are broad, issue-oriented statements that reflect the priorities of the agency.

### Development Guides

The development of agency goals is one of the most critical aspects of the strategic planning process because goals chart the future direction of the agency. The goal development process begins to focus an agency's actions toward clearly defined purposes. Goals stretch and challenge an agency, but they are also realistic and achievable.

Goals should be client-focused and easily understood by the public. Although there is no established limit, the number of goals the agency may develop should be kept to a reasonable number to establish direction and provide unifying themes for programs and activities. During goal development, the agency should begin identifying the desired results of its efforts and the corresponding performance measures that will demonstrate the accomplishment of its goals.

When formulating goals, the agency should consider the following questions:

1. Are the goals in harmony with the agency's mission and/or vision statement? Will achievement of the goals fulfill or help fulfill the outcomes described in the mission and/or vision statement?
2. Do the goals provide clear direction for the agency?
3. Do the goals sufficiently cover the work being performed by the agency? Can employees within the agency identify the goals that they are working to achieve?

### Examples

- *Department of Fish and Game:* Improve public understanding of and involvement in fish and wildlife management.
- *Department of Environmental Quality:* Protect human health and the environment through proper waste management, mitigation, and remediation of contaminated areas.
- *Office of Energy Resources:* Coordinate energy-related projects that benefit Idaho.
- *Department of Agriculture:* Foster confidence in Idaho's agriculture industry and market transactions.

## OBJECTIVES AND/OR TASKS

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### Definition

Objectives and/or tasks identify clearly defined and achievable steps that will lead to the accomplishment of an agency's goals. They are time-based statements of intent that lead to specific action by an identified position or team within the agency. They emphasize the results of agency actions at the end of a specific time period.

### Development Guides

An agency's objectives are derived from its goals and identify how an agency will make progress toward them. The development of objectives aids decision making and accountability by focusing on specific, assignable actions.

Each agency goal should be supported by at least one objective, and multiple objectives may be warranted if they lead to progress in achieving agency goals. In the strategic plan, objectives should be shown under each goal in approximate priority order, beginning with those of greatest importance and impact. Large objectives may be broken down into smaller objectives, or tasks, as agency needs require.

Objectives and/or tasks should be easily understood by the public and clearly state the specific results the agency seeks to accomplish. The following questions should be asked to determine the relevance of each objective and/or task:

1. Will meeting the objective create progress toward the stated goal?
2. Does the objective clearly state what the agency intends to accomplish?
3. Is the objective realistic and attainable?
4. Does the objective describe an outcome in terms of specific targets and time frames that can be measured?
5. Is there a clear plan for how the objective will be accomplished and who will be responsible?

#### Examples

- By April 2018, the agency's business analyst will summarize client survey data and recommend ways to improve customer service.
- The Public Information Officer will work with public and private entities to develop a social media campaign on substance abuse to be implemented in November 2018.
- *Objective:* Simplify and modernize the grant award process  
*Assigned Party:* Financial Services  
*Target Completion Date:* March 1, 2019

## PERFORMANCE MEASURES

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### Definition

Performance measures are tools used to determine the results or impacts of government action or policy upon a stated condition or problem. They measure the effectiveness or efficiency of an agency's performance or the public benefit derived.

### Development Guides

Performance measures should focus on those items which best demonstrate whether the agency is accomplishing its goals. They should be expressed in a quantifiable form. As indicated in Idaho Code 67-1903(1)(d) and 67-1904(1)(b)(i), the performance measures



developed by the agency in the strategic plan should match those that will be reported on in the performance report the following year.

While objectives and/or tasks identify planned agency activities, performance measures identify the output or outcome of agency activities using quantitative or qualitative data. Good measures provide information that can be used to gauge performance relative to an established benchmark or target. Progress in reaching agency goals can be assessed when actual results are compared to desired results or benchmarks in the performance report.

A performance measure should be directly related to the goal it is measuring. It should be clear and easily understood by those who are unfamiliar with the agency. The following questions should be addressed as performance measures are developed:

1. Is the performance measure meaningful? Does it represent improvement for those served by the agency?
2. Is the performance measure relevant? Is it logically related to an agency goal?
3. Is the performance measure reliable? Will it produce accurate and verifiable information over time?
4. Is the performance measure clear? Are the terms used easily understood? Will the measure be easily understood by those who are not familiar with the subject?
5. Is the measure of sufficient value to justify the cost of producing the necessary data? In the case of excessive costs, could sampling techniques or other more cost-effective alternatives be used to collect the data?
6. If data is not currently available, can a proxy measure be substituted until it is available?
7. Will the performance measure enable a decision to be made or lead to a valid conclusion concerning the agency's action?

Examples of performance measures, with their accompanying performance targets/benchmarks, can be found on page 10.

## PERFORMANCE TARGETS/BENCHMARKS

### **Definition**

Performance targets and benchmarks identify desired or intended results for a particular performance measure. They establish a desired threshold for performance, which may be based on prior agency performance or the performance of other organizations the agency seeks to emulate.

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Performance targets are used to track the progress of the agency in reaching its goals by comparing actual results to desired results in the agency's performance report. They help an agency determine the success of strategic plan implementation.

As required by Idaho Code 67-1903(1)(e), the strategic plan must explain the manner in which each performance target or benchmark was established. This means that the plan

should include an explanation of why each performance target was set at the given level and why each benchmark was selected as an indicator of success. These explanations may accompany each target/benchmark or be included as footnotes. The table on page 9 provides examples of performance targets and benchmarks, including the manner in which they were established.

In developing and selecting performance targets and benchmarks, the following questions should be addressed:

1. Is the performance target or benchmark meaningful? Does it establish an appropriate comparison point for performance results?
2. Does the performance target motivate improved performance? Will it help the agency to reach its goals?
3. Is the performance target achievable? Can the agency reach the target through its best efforts?
4. Is the benchmark reliable? Will the data used in the measure be available on a continuing basis?

<b>Performance Measure Examples with Targets/Benchmarks and Explanations</b>		
<b>TYPE</b>	<b>MEASURE</b>	<b>TARGET OR BENCHMARK</b>
Quantitative	Grant dollars awarded	\$1,500,000 <sup>1</sup>
	Average cost of services per client	<\$20 <sup>2</sup>
	Number of community events held	80 <sup>3</sup>
Qualitative	% of clients off alcohol and drugs 12 months after exiting program	67% <sup>4</sup>
	% of inspections completed within 10 business days of request	95% <sup>5</sup>
	Student pass rate for Technical Skill Assessment	Secondary: 75.6 <sup>6</sup> Postsecondary: 92.5 <sup>6</sup>
<ol style="list-style-type: none"> <li>1. Indicates full deployment of all available grant funding</li> <li>2. Internal target established by management to increase efficiency in service delivery</li> <li>3. Represents 5% increase over prior year, which aligns with goal to increase awareness of services</li> <li>4. Based on goal to reduce incidence of relapse</li> <li>5. Based on need to provide timely inspections for Idaho businesses</li> <li>6. Benchmark based on average of peer institutions using nationally reported data</li> </ol>		

## KEY EXTERNAL FACTORS

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### Definition

Key external factors are things beyond the control of the organization. They include changes in economic, social, technological, ecological, or regulatory environments that could impact the agency and its ability to fulfill its mission and goals.

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Key external factors may be similar or even the same for many state agencies, but how those external factors impact an agency's ability to complete its mission may differ. Developing key external factors allows an agency to openly address assumptions upon which the goals and objectives are based.

**Examples**

- Availability of funding
- Federal and state regulatory actions and mandates
- Weather/drought/natural disasters
- Litigation and court decisions