IDAHO STATE UNIVERSITY

SUBJECT
Idaho State University (ISU) Annual Progress Report

APPLICABLE STATUTE, RULE, OR POLICY
Idaho State Board of Education Governing Policies & Procedures, Section I.M.3.

BACKGROUND/DISCUSSION
This agenda item fulfills the Board's requirement for Idaho State University to provide a progress report on the institution's strategic plan, details of implementation, status of goals and objectives and information on other points of interest in accordance with a schedule and format established by the Board's Executive Director.

IMPACT
ISU's strategic plans and initiatives drives the University's integrated planning, programming, budgeting, and assessment cycle and is the basis for the institution's annual budget requests and performance measure reports.

ATTACHMENTS
Attachment 1 – Idaho State University Annual Progress Report

STAFF COMMENTS AND RECOMMENDATIONS
Idaho State University's annual report gives the Board the opportunity to discuss the institution's progress toward meeting strategic goals, initiatives the institution may be implementing to meet those goals, and progress toward the Board's student completion initiatives.

BOARD ACTION
This item is for informational purposes only.

Idaho State University

Progress Report

2020

ROAR

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Executive Summary

For the 2019-2020 academic year, Idaho State University focused institutional efforts and priorities around the four major themes that align with ISU's strategic plan and the State Board of Education's strategic plan. The University made substantial progress developing and implementing initiatives aimed to make tangible improvements in the following areas.

1. **Recruitment and Retention:** Commit to removing barriers to student success to ensure degree completion, while improving the go-on rate in Southeast Idaho.

2. **Focus on Relationships:** Build strong relationships with community and industry, creating a pipeline to employment upon graduation.

3. **Promote Identity and Culture:** Develop an institutional identity that attracts students and fosters a student-centric approach.

4. **Efficiency and Effectiveness:** Explore operational and structural efficiencies while focusing resources to support the core mission of education.

The intent of the following report is to provide the State Board of Education high-level accomplishments made in the academic year 2019-2020 and outline specific initiatives to be implemented in the academic year 2020-2021. It should be noted that accomplishments discussed below were achieved despite approximately half of the year being devoted to COVID-19 response.

A Year in Review

The following provides a high-level overview of Idaho State's accomplishments during the academic year 2019-2020.

Theme	Title	Description
Recruitment and Retention	**Academic Success and Retention Task Force**	ISU conducted a thorough, data-informed analysis of student success and retention issues. From there a multi-year operational plan was developed to address those retention issues, fully incorporating the Momentum Pathways Game-Changers. The goals and projects identified below for 2020-2021 are aimed to specifically address ISU retention issues.
	CCA Game Changer: Math Pathways	ISU implemented Math Pathways campuswide, ensuring students are placed in a math course that matches with their major and program and best aligns with the student's needs, interests, and academic goals. In addition, we implemented the Corequisite Math model for all gateway courses with open education resources used throughout.
	Academic Advising	ISU conducted a comprehensive review of academic advising services, transitioning from a reactive model with decentralized operations to a model by which advisors proactively engage all new and continuing students. This effort is ongoing.
	Career Path Internship Program	ISU's Career Path Internship program provides career and major related internships for students. CPI participants have a 13% higher retention rate than non-participants. The University is undergoing outreach efforts with employers to increase the number of off-campus CPI internships to help students acquire experience in their field of study and more successfully transition into the workforce.
	Dean Positions	ISU hired four new deans to serve the institution: Dean of the College of Education, Dean of the College of Business, Dean of the Library, and Dean of the Graduate School. These positions will all support renewed efforts on recruitment and retention in the colleges and Graduate School.
	CCA Game Changer: Momentum Year	ISU developed and implemented best practice recommendations for teaching in the Momentum Year as part of the Momentum Pathways state initiative, which supports a best-practices approach to the first-year experience for incoming new students.
	Student Athlete Engagement	ISU developed an ongoing student athlete engagement program by which each of ISU's 15 athletic teams participated as a group in at least two student events or productions on campus. This initiative increased attendance and participation by all students. Engagement in activities such as these correlate positively with student retention.
	University Housing Upgrades	ISU was approved by the SBOE to bond for $5 million to invest in physical upgrades to severely deteriorating student housing spaces. Improvements will occur in the highest student use spaces during summer 2020, winter 2020, and summer 2021.
Focus on Relationships	**Systemness Collaboration**	ISU provided critical leadership in expanded systemwide collaboration efforts. This included supporting statewide efforts to built a joint cybersecurity program, while providing direct leadership over the following PLC initiatives: ● III.Z Policy Revision: ○ Project Overview: Review the state's dual enrollment program with the following objectives: 1. Leverage Idaho's dual-enrollment program and Idaho's Advanced Opportunity funding to realize more students going on to in-state higher education. Essentially, develop strategies that can develop dual-enrollment as a recruiting tool for Idaho's higher education system. 2. Leverage Idaho's dual-enrollment program and Idaho's Advanced Opportunity funding to increase the speed of progress toward a degree for students that go on to higher education. 3. Develop a proposal for PLC to approve initiatives that can be launched or alterations to current dual enrollment policies, practices or processes that meet those objectives. ● Dual Enrollment: ○ Project Overview: Develop a policy revision proposal for board policy III.Z that incentivizes cooperation, coordination, and synergies between the institutions. Revise policy language that creates an environment of competition and silos. Maintain a focus on avoiding duplication and encouraging excellence in certain areas.

Idaho State University

| 3 |

ROAR

Theme	Title	Description
Focus on Relationships	**Industry Partnerships**	In the last year, ISU has added, realigned, or otherwise substantively adjusted the following programs. All adjustments took into consideration workforce needs and student demand: • ITC Basic Electronics (RCET Robotics) • BS Applied Mathematics • MCOUN Clinical Rehab • Certificate in Land Surveying • BAS Cyber-Physical Systems Engineering Technology • Commercial Music Option BM • Minor Applied Behavioral Analysis • Minor Advocacy • Data Analytics Emphasis • MS Nutrition Marketing Emphasis • MS Nutrition Management Emphasis • MACC Taxation Emphasis • Community Health Worker Certificate
	Teacher Waiver Program	ISU developed a teacher waiver program for high school teachers that provides a pathway for dual credit instructors to receive a masters degree ensuring adequate rigor in advanced opportunity courses. In addition, ISU expanded on-campus offerings for dual enrollment students and identified technology that can help deliver similar programming to students in rural areas in ISU's service region.
Promote Identity and Culture	**Marketing Campaign**	Beginning in 2018, ISU launched a statewide brand-image campaign. This investment, which ranges from $650,000 to 1 million dollars each year, has yielded results. Prior to COVID-19 new student applications were up 15% and housing deposits were up 14%.
	Strategic Planning	ISU's strategic planning effort is underway that will be complete in summer 2021. President Satterlee presented the following themes to guide the planning efforts: Career Readiness, Relevant Research, Student Centered, and Health and the Human Experience
	Athletics Gender Equity	ISU's Athletics department devoted considerable effort to improve gender equity. Tremendous progress was made related to equitable facilities and budgets, primarily through reallocation of venues and resources. The department adjusted roster management and limited practices to achieve equity within 3% of proportionality (compliance is within 1%) which is a dramatic improvement from 6%. The Gender Equity Committee has developed a five-year Gender Equity Plan which will launch fall 2020.
	Capital Projects	ISU is currently undergoing a comprehensive renovation of Davis Field, which will accommodate the needs of the Track and Field and Soccer programs, in addition to restoring a pivotal landmark of ISU's campus.
Efficiency and Effectiveness	**Budget Model and Reductions**	In FY20 ISU reset its budget based on actual expenses. The University then underwent an exercise to reduce expenditures to match revenue, which resulted in a total of $11 million reduction over two years. A comprehensive overview of budget reduction efforts can be viewed online here.
	Administrative Overhead Reduction	The University underwent a number of reorganizations and staffing measures to reduce administrative overhead ensuring resources were adequately prioritized to student and academic services. The following units underwent strategic reorganizations that yielding significant financial savings. • University Budget Officers • University Advancement • Academic Affairs Administration • President's Office • Kasiska Division of Health Science Administration
	Program Prioritization	Working with ISU's Faculty Senate, a new program review framework was developed.
	Scholarship Program Review	ISU reviewed its scholarship program in partnership with a consultant, RNL, to understand past practices for scholarship awards to ensure that all scholarship awards are appropriately and effectively incentivizing enrollment and retention of students.
	COVID Response	In February and March 2020, Idaho State University effectively and efficiently moved the entire University to an online environment in a two-week period.

College and Research Highlights

- ISU's Disaster Response Complex (DRC) is a nearly $1.1 million project funded by the Higher Education Research Council (IGEM-HERC) to Dr. Mustafa Mushal of the Department of Civil and Environmental Engineering. The DRC is in collaboration with the Idaho National Laboratory (INL) and the Center for Advanced Energy Studies (CAES). The project will build facilities and curriculum for disaster response research and training for first responders in the Idaho National Guard, Idaho Office of Emergency Management, and local search and rescue/fire departments. Once completed, the DRC will be a unique facility in the Pacific Northwest.

- ISU Nuclear Engineering professor Mary Lou Dunzik-Gougar received an $800,000 grant for materials science research from the U.S. Department of Energy to study submicroscopic materials and determine their suitability for the development of new nuclear fuels.

- The Office of Research modified the distribution of its annual CAES allocation to provide new seed funding for research projects that involve ISU students, ISU faculty, and INL collaborators. These projects allow faculty and students to work side by side, introduce students to career opportunities, strengthen the relationship between ISU and industry, and will lead to sustainable research growth funded by external sources.

- Two faculty in the Department of Psychology, Dr. Steven Lawyer and Dr. Sam Peer, received a $1.1 million Health Services and Resources Administration (HRSA) Graduate Psychology Education grant. The grant is titled "Idaho Rural Interdisciplinary Health Collaborative (IRIHC)" and will address the need for mental health interventions for opioid addiction. The funding will provide important training opportunities for clinical graduate students in the program and much needed behavioral health services for communities in the region.

- The Idaho State University College of Technology has been awarded a more than $2.3 million grant to construct a new technical education facility to train students in diesel power generation systems.

- The College of Nursing strengthened relationships with CSI and CEI following review and update of ISU College of Nursing BS Completion program for a smoother transition of Associate Degree (ADRN) to Registered Nurse (RN) Bachelor of Science in Nursing (BSN) completion resulting in a 50% increase in number of students enrolled in ISU School of Nursing BS completion program for fall 2020.

The Year Ahead

The following provides a high-level overview of ISU's initiatives that will be the focus of academic year 2020-2021.

Theme	Title	Description	Target Completion
Recruitment and Retention	**Academic Meta-Majors, Degree Mapping and Scheduling**	Develop meta-majors (or areas of interest) at ISU. Bring a proposal for which degrees and programs will be incorporated into each meta-major to the Faculty Senate and Leadership Council for approval. Academic Advising, and faculty generally, should be a part of this process to ensure it translates to overall student success. The adoption of meta-majors should support interdisciplinary activity on campus. Appropriate broad-based interdisciplinary degrees linked to each of the areas of interest should be developed to ensure that all students with the adequate number of credits are able to graduate. This project should include a review and streamlining of the major declaration process to ensure that it is as student-centric as possible. In addition, this charter will oversee the completion and management of the degree-mapping process (including the Momentum Year), and conduct a review of classroom utilization and scheduling, with recommendations to be presented to the Leadership Council.	Fall 2021
	Math Pathways	Develop math pathways at ISU that ensure that students are placed in a math course that is matched with the right major and program and best aligns with the student's needs, interests, and academic goals. Collaboratively with Student Affairs, develop implementable strategies that help more students take math in their first year. As Student Affairs works to implement a campuswide early alert system, leverage this opportunity with math courses to identify students that are struggling early and have the right support mechanisms in place to assist those students. Implement other curricular changes outlined in the Momentum Pathways reports and continue implementation of the co-requisite model, ensuring that faculty purview over curriculum is respected and maintained.	Fall 2021
	Bengal Bridge Program Review	Review the Bengal Bridge Program to assess the most impactful delivery of the program. The review should include assessing which faculty should be teaching which courses and the overall role of Bridge faculty in relation to academic advising. This group should assess recommendation #6 of the Academic Success and Retention Taskforce to determine next steps. Review the aspects of the Bengal Bridge that are successful and have the potential to positively impact our larger population, and assess how this can be scaled.	Fall 2022
	Leverage Dual Enrollment	Academic Affairs will enhance the traditional dual enrollment experience by better meeting the identified needs of students, high school teachers, high school administrators, faculty liaisons, and departments who oversee curriculum. This effort will include surveying stakeholders and developing a strategic vision for dual enrollment that helps ISU overcome perceived obstacles to program growth and recruitment success. A review of the revenue and expenditures will be completed in order to consider a variety of programmatic funding models that can help ISU achieve the above stated goals. The ultimate goal will be to identify ways to enhance the experience of stakeholders, leverage the program to facilitate institutional enrollment growth, and improve student retention.	Spring 2022
	Residential Life Improvements	The University is investing $5 million in housing facilities upgrades. This project charter should ensure that those funds will be maximized with the goal of improving the overall residential experience for our students. The focus of the improvements needs to be the items that make our housing attractive to students and meets their needs.	Summer 2021
	Recruiting Initiatives	Enrollment Management will work to improve our ability to attract new students to ISU by hosting an annual recruiting event for high school students, working to solidify our tracking of students as they progress through our recruitment funnel, and through consistent usage and promotion of a master schedule of recruitment events/activities. The crux of the efforts will be towards best leveraging of our efforts both within Enrollment Management and across the University.	Summer 2021

Theme	Title	Description	Target Completion
Recruitment and Retention	**First Year Experience**	Redesign the onboarding process and New Student Orientation for new first-year and transfer students. Incorporate financial literacy programming and education into New Student Orientation. Develop the programming necessary to ensure that students have an opportunity for meaningful engagement during their first year. Collaboratively with University Advancement instill the concept of Bengal for Life, that translates into lifelong engagement with ISU. Pilot an experimental first-year ACAD course aimed at preparing students for successful degree completion. Ensure that the faculty purview related to curriculum is maintained in the development of the course. One of the primary indicators of student success and retention is their first-year academic performance. Therefore, offering first-year-only general education course sections, taught by faculty who are experienced and engaged, should be explored. Make recommendations to Leadership Council and Faculty Senate to create a program by which first-year-only general education sections are taught by faculty designated because of their experience and expertise in teaching first-year students, under the theory that faculty who will build a strong connection to a student can make a significant difference in student success and retention.	Summer 2022
	Academic Advising Program Coordination	Operationally unify the onboarding, operations, processes and practices of all campus academic advisors regardless of reporting lines. Assign a full-time primary advisor at the point of admission, with the goal of every student receiving proactive and personalized advising support starting on the day they are admitted and continuing at appropriate points in the students' progress toward graduation. Initiate mandatory advising for all undergraduate students, including non-degree seeking. Institute a campuswide proactive and comprehensive advising culture. This charter should include best-practices as related to advising students on momentum years. Ensure that the above-mentioned goals are achieved at all campus outreach centers as well.	Summer 2022
	Student Early Alert and Communication Software	Partner with a vendor to provide resources to drive student success and communication using a single student communication software that allows for clear, action- focused, and synergistic messaging to all students. Implement a faculty and staff user-friendly early alert intervention system designed to immediately identify and intervene with students who are struggling to succeed. As with any new software roll-out, it is imperative that the appropriate level of staffing, communication, training and change management occurs for faculty and staff users of the new software to ensure overall effectiveness.	Summer 2022
Focus on Relationships	**System Coordination: Idaho Falls and Twin Falls**	Develop an educational environment in Idaho Falls and Twin Falls where students are directed to their optimal degree offering through ISU, UI, CEI, and CSI institutions.	Spring 2022
	INL Relationship and Polytechnic Initiative	Idaho State University will become the institution with the strongest Idaho National Laboratory partnership through the development and delivery of high quality programs and cutting edge research expertise that complements the laboratory mission. ISU will leverage the Polytechnic legislative funding, the Center for Advanced Energy Studies, and the INL Educational Contract as well as existing educational and research expertise to build this relationship.	Fall 2023
	Employer Needs	Idaho State University will work to ensure students can acquire meaningful jobs and fulfilling careers upon graduation. To meet this end, ISU will engage in a University-wide workforce analysis. Each college at ISU will perform an analysis of the top 10 employers they currently work with. Each college dean will consult with the director of the Career Center and the top 10 employers to identify their specific workforce needs and determine how ISU can help meet these needs more effectively. This process will ensure that our academic majors and programs are positioned to prepare, inspire and empower graduating students for a lifetime of meaningful work.	Summer 2022
	Systemness Exploration and Support	Work collaboratively with ISU's sister institutions and the Office of the State Board of Education to identify opportunities for systemwide efficiency and streamlining.	Summer 2022

Theme	Title	Description	Target Completion
Promote Identity and Culture	**Research Initiative**	Idaho State University will work with faculty, staff, students and external stakeholders to determine the research aspirations of the campus and the role of the Office for Research at ISU as we work to strategically develop research and other scholarly activities.	Summer 2021
	Employee Engagement, Morale and Culture	Human Resources will focus on management philosophies, emphasizing "our people are our biggest resource." HR will serve as the campus resource in helping departments establish trust, compassion, stability and hope within their units.	Summer 2022
	Marketing Campaign	Marketing and Communications will develop and execute a statewide marketing campaign that tells the Idaho State University story in a compelling and relevant way.	Ongoing
	Employee Engagement Task Force	An Employee Engagement Task Force will be assembled to identify barriers to engagement, and actively address these barriers through employee engagement initiatives.	Ongoing
	Capital Projects	ISU will construct the new ICCU Bengal Alumni Center in 2020-2021. The project is primarily funded through philanthropic support that has been raised over the last decade. ISU will also construct a new softball facility funded entirely from donor support.	Fall 2022
Efficiency and Effectiveness	**Strategic Plan**	Complete strategic planning effort guided by the initial themes of: Career Readiness, Relevant Research, Student Centered, and Health and the Human Experience. This is paused due to COVID-19.	PAUSED
	Program Review and Prioritization	Complete a thorough program review and prioritization effort.	Spring 2021
	Data and Analytics Plan and Process	Conduct a comprehensive review of the university's data and analytics capabilities across all divisions and units. Ensure we have the appropriate data systems that are capturing the data we need with the reporting capabilities necessary to make data-informed decisions. Related to student recruitment and retention, work collaboratively with Academic and Student Affairs to identify the outcomes we expect to measure over time, identify the data needed to measure those outcomes, and help develop the needed reporting tools. Review, recommend and facilitate implementation of clear roles and responsibilities related to data management for the following offices: Institutional Research, Information Technology Services, Enrollment Management, and the Registrar's Office. Review the University's Customer Relationship Management vendor and contracts to ensure overall efficiency and effectiveness.	Summer 2022
	Budget Model	Identify a new budget model system that allow the university to evaluate the base allocation, properly incentivize program growth and retention, and decentralize budgetary authority to colleges, departments and units,	Summer 2021
	Employee Relations	Human Resources will develop the tools, resources and philosophies that provide the ability to manage performance issues and handle progressive discipline appropriately. The program will ensure managers have the resources to manage and actively address employee issues.	Summer 2022
	Scholarship Program Review	Begin a systematic and data-informed effort to review the University's scholarship and discounting program to ensure that all funds and discounts expended have the greatest impact on overall student recruitment and retention. Our discounting program should bolster rather than threaten the overall financial health of the institution. Our scholarship and discounting program should be capturing those students who would not otherwise enroll or continue towards degree completion with the financial support.	Summer 2021

The Numbers

- We are working to meet the community's health care needs – **ISU teaches 33 of the Department of Labor's 46 top health care programs in the U.S.**

- We offer quality education – **88% of ISU students in 2018 met or exceeded** the national average for first-time pass rates for health program certification testing. (Most recent numbers available through national tracking)

- We serve Idaho – **89% of our students are Idaho residents.**

- We support industry needs – **18 of 20 Idaho Hot Jobs** are available at ISU, as named by the Department of Labor.

- We support student needs– ISU offers Idaho's **only tuition lock program.**

- We strive for excellence – **100% of ISU's specialized accredited programs** are in good standing with their accrediting organizations. This is the first time in more than 10 years that this has occurred.

- We adapt to changing needs – **13 new programs were added** and 6 programs discontinued.

Idaho State University Key Data	FY2015	FY2016	FY2017	FY2018	FY2019	FY2020
Total Annual **Enrollment** Full-Time Equivalency (FTE) [1]	**10,808**	**10,589**	**10,233**	**9,960**	**9,775**	**9,589**
- Career Technical	810	788	771	747	828	819
- Undergraduate	7,861	7,759	7,378	7,108	6,864	6,587
- Graduate	2,137	2,042	2,084	2,105	2,083	2,183
Total Idaho resident new degree-seeking undergraduate students[2]	1,630	1,562	1,500	1,643	1,681	1,584
Retention Rate: fall-to-fall, full-time, first-time bachelor degree seeking student FYs 18-22	72%	72%	69%	64%	63%	64%
Freshman to Sophomore (all degree-seeking - fall-to-fall retention)	69%	69%	65%	63%	62%	62%
Sophomore to Junior (all degree-seeking - fall-to-fall retention)	79%	78%	76%	80%	80%	80%
Junior to Senior (all degree-seeking - fall-to-fall retention)	87%	87%	88%	88%	90%	88%
Graduation Rate: percent of full-time, first time students from the cohort of new first-year students who complete their program within 1½ times the normal program length	30%	28%	29%	32%	34%	Available late August 2020

1. Annual full-time equivalency (FTE) is calculated by dividing the total Undergraduate and Professional Technical credit hours (SCH) by 30; total Graduate SCH is divided by 24.
2. New students in the summer semester enrolled in the subsequent fall semester are counted as "new" in the fall semester.

Idaho State University
PPGA

ROAR

Permanent Budget Savings: Fiscal Years 2021 and 2022

Vacant Positions	$ 4,547,334
Filled Positions	$ 2,216,496
Irregular/Temporary Expenditures	$ 907,150
Operating Expenditures	$ 3,625,395
New Revenues	$ 482,626
Total Permanent Budget Savings	**$ 11,779,001**

One-Time Budget Savings: Fiscal Year 2021

Salary Savings	$ 2,750,000
Employee Furlough Program	$ 2,000,000
Total One-Time Budget Savings	**$ 4,750,000**

Fundraising and Advancement Data

Key Data	FY2016	FY2017	FY2018	FY2019	FY2020
Contributions, Net[1]	$ 6,036,570	$ 5,315,986	$ 9,827,927	$ 12,444,203	$ 9,300,000
Cash, Property and In-kind Gifts[2]	$ 6,819,544	$ 5,150,490	$ 11,084,469	$ 13,288,124	$ 9,267,463
Endowment Funds[3]	$ 48,958,701	$ 53,258,798	$ 57,584,648	$ 56,346,446	$ 56,827,229
Fund Distributed for Scholarships	$ 1,882,867	$ 1,911,321	$ 1,742,248	$ 2,032,049	$ 2,827,832
Funds Distributed for University Programs and Capital Projects	$ 5,164,732	$ 3,404,725	$ 1,955,349	$ 7,211,646	$ 4,140,716

[1] Accrual basis - reflects adjustments for pledges and estimates for uncollectible pledges, stated at NPV
[2] Cash basis, rather than accrual
[3] Not all of the endowed funds are dedicated to scholarships

Conclusion

Idaho State University is diligently working to advance its strategic plan in alignment with the State Board of Education's strategic plan. Substantial progress was made in the 2019-2020 academic year, and the plans are well underway to continue progress through 2021.

There are substantial challenges ahead for Idaho State, including significant budget shortfalls, reductions in staffing levels, and a very unknown landscape caused by the onset of the COVID-19 pandemic. These challenges will undoubtedly impact the University's momentum to complete the strategic initiatives outlined in this report. However, the University remains resolute and dedicated to remaining a higher education leader with a mission of changing lives.

IDAHO PUBLIC TELEVISION

SUBJECT
Idaho Public Television (IPTV) Annual Report

APPLICABLE STATUTE, RULE, OR POLICY
Idaho State Board of Education Governing Policies & Procedures, Section I.M.3.

ALIGNMENT WITH STRATEGIC PLAN
Board Governance item, required by Board policy.

BACKGROUND/DISCUSSION
This agenda item fulfills the Board's requirement for IPTV to provide a progress report on the agency's strategic plan, details of implementation, status of goals and objectives and information on other points of interest in accordance with a schedule and format established by the Board's Executive Director.

Ron Pisaneschi, General Manager of Idaho Public Television, will provide an overview of IPTV's progress in carrying out the agency's strategic plan.

ATTACHMENTS
Attachment 1 – IPTV Annual Agency Review PowerPoint Presentation

STAFF COMMENTS AND RECOMMENDATIONS
Idaho Public Television serves as a provider of high quality educational content around the state. Idaho Public Television not only provides resources to educators in the classroom, but also to individuals in the home, reaching many areas of the state that have no other access outside of the student's attendance at their local public school. The annual report provides the Board with the opportunity to discuss how Idaho Public Television's efforts support the Board's strategic goals.

BOARD ACTION
This item is for informational purposes only.

Agency Overview
August 26, 2020

Ron Pisaneschi, General Manager

Our Mission

Idaho Public Television harnesses the power of public media to encourage lifelong learning, connect our communities, and enrich the lives of all Idahoans. We tell Idaho's stories.

Three Strategic Goals

- Position Content and Services on all the new Digital Platforms

- Enhance Local Productions

- Increase Educational Services and Partnerships

New Digital Platforms

- Added Live-Streams of Idaho & Kids Channels on YouTubeTV

- Adding Live-Stream to IdahoPTV.org & PBS App

- Added Outdoor Idaho YouTube Channel

- Added Additional Content on PBS Learning Media (IDEX)

- Exploring Live-Stream of World Channel

- Enhanced On-Demand Viewing Experience with Updated Functionality

- Acquiring Additional Content for Passport
  Online Viewing Growing Dramatically – Including Our Content

IDAHO **PBS**
PUBLIC TELEVISION

video.idahoptv.org
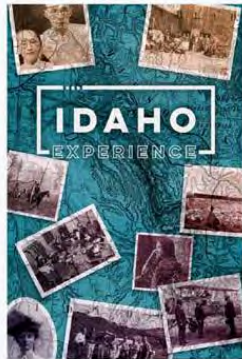
Broadcasting Still Huge

- More than 500,000 Viewers Tune In to IdahoPTV per Week

- Completed Repack of Idaho Channels, Post-Spectrum Auction

- Moved Schedule of Digital Sub-Channels in PT to Match MT

- Updated Emergency Alert System To Make More Robust

IDAHO PUBLIC TELEVISION **PBS**

Broadcast vs. Online

Video Viewing Is Still Mostly on Broadcast Television

**Broadcast Television
29.5 Hours per Week**

**Online
8.5 Hours per Week**

Source: February 2020 Nielsen Company

Local Production Updates

Coming Home
CPB Rural Planning Grant

Specials such as
Education in Idaho
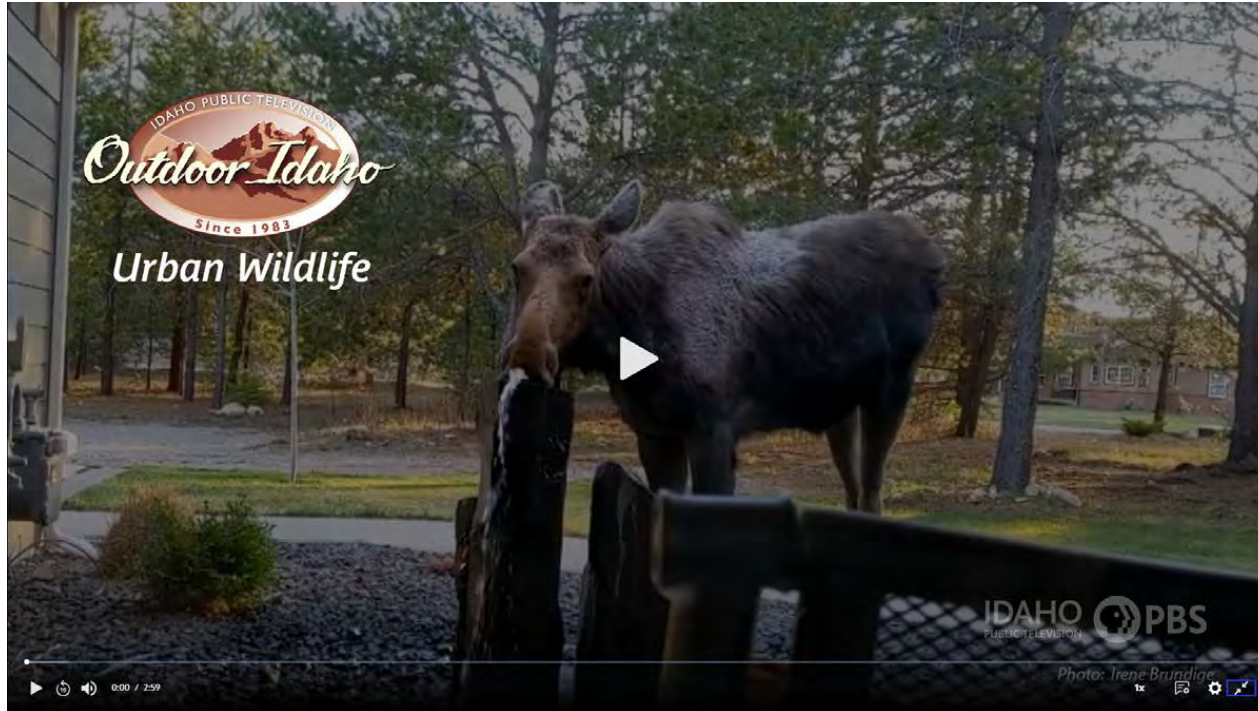
Click here for link to video clip

Educational Services

- Teacher Community Program Continuing IdahoPTV Ed Camps

- PBS LearningMedia
  - Idaho Experience Curriculum for 4th Graders
  - Science Trek
  - Working with WGBH on interactive lessons

- Media Literacy Courses for Idaho Teachers

- Parent Engagement Project – Including Mothers in Prison

- Coding Camps for Kids

- Ready to Learn - Countdown to Kindergarten and Family Creative Learning Workshops

- Preschool Development Grant – Birth to Five

- American Graduate Project – Next Steps Idaho, Workforce Development Council

idahoptv.pbslearningmedia.org

And Then the Pandemic Hit…

Local Covid-19 Pandemic Productions

- Created Special Coronavirus Info Website
- Daily Coronavirus Updates from Idaho Reports
- Covering Governor's Press Conferences Live Through IIS and Broadcast Statewide
- Producing Live Q & A with Governor & Other Officials
- Continuing Idaho Reports Past Legislature with COVID-19 Info
- Began the 180 with Marcia Franklin
- Continuing New Outdoor Idaho, Idaho Experience, Science Trek Productions
- Special Productions, such as Idaho Memorial Day Video, Resilient Idaho: Hope Lives Here (90 Sec Segments on YouTube)
- Enhanced Digital and Social Media Offerings
- (Mostly) All While Working From Home

IDAHO PUBLIC TELEVISION **PBS**

Click here for link to video clip

Click here for link to video clip

Helping Meet Educational Needs During Pandemic

Spring Response

Classroom IDAHO: LEARN @ HOME

- Idaho Teachers Presenting Lessons from their Homes
- Grades 3-6, Mon - Fri 8am - 1pm MT
- One Grade per hour Broadcast on Create Channel
- Archived on IdahoPTV.org
- Partnered with &
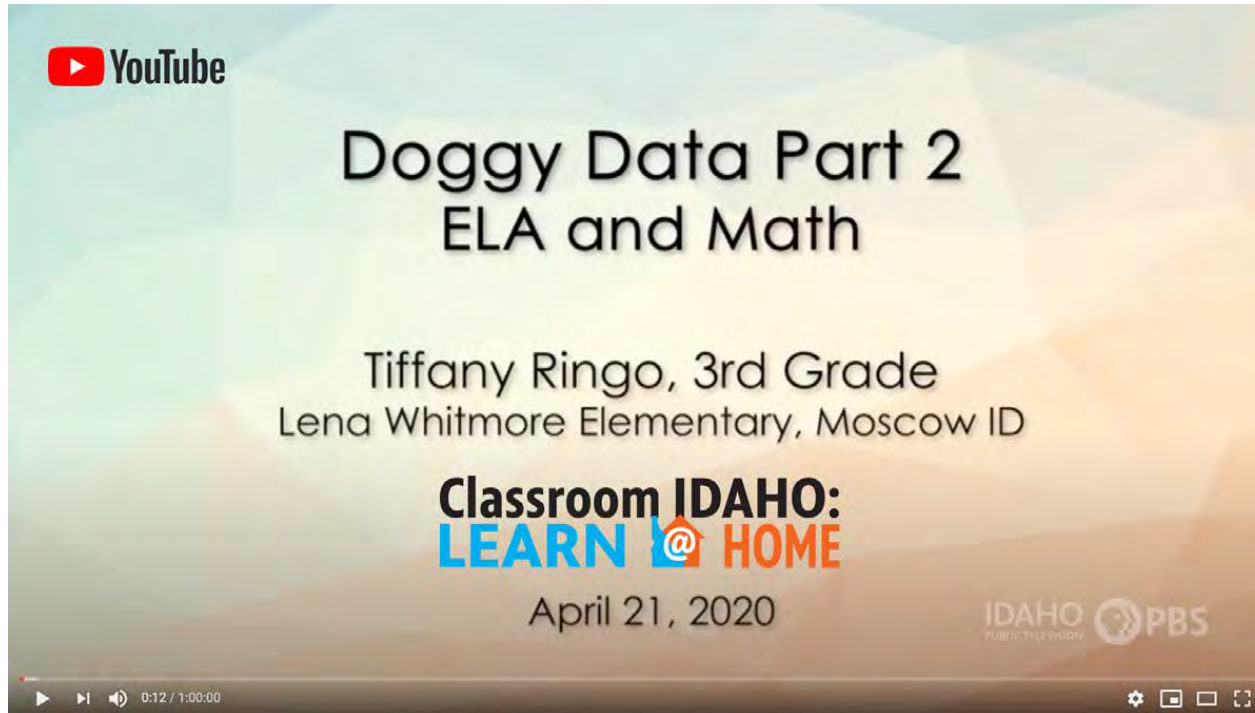
Click here for link to video clip

Helping Meet Educational Needs During Pandemic

Spring Response

- Built Dedicated Website with Resources
- Enhanced PreK – 2nd Grade Resources via PBS Kids Channel
- Special Programming for Grades 7-12 on Create Channel in PM
- Online Workshops on Using PBS LearningMedia and Other Distance Learning Tools
- Enhanced Parent Material via Text & Web
- Online Book Club for Children and Read Aloud Stories in English and Spanish

Summer Education Response

Classroom IDAHO: LEARN @ HOME BOOT CAMP

- Idaho Teachers Presenting Self-Recorded and Edited Lessons
- Grades K-3 – T-Th 8-9:30 am
- Grades 4-6 – T-Th 10 am-Noon
- College & Career, Mon & Fri 11:30 am
- English Language Learners, Mon & Fri at Noon

- Broadcast on Create Channel, Archived on IdahoPTV.org
- Partnered with IDLA, SDE, IBE, SBoE, Idaho Office on Refugees, English Language Centers
- Governor's Emergency Education Relief Fund

Click here for link to video clip

Summer Education Response

- Special Programming for Grades 7-12 on Create Channel in PM

- Online Workshops on Using PBS LearningMedia

- Enhanced Parent Material via Text & Web
  - Beginning Bright By Text Work

- Online Book Club for Children

Fall Education Response

Classroom IDAHO: LEARN @ HOME

- Planning to Work with Same Partners
- Idaho Teachers Presenting Lessons from Home & School
- Grades K-3, Schedule Being Developed
- Grades 4-6, Schedule Being Developed
- College & Career, Schedule Being Developed

- English as a Second Language, Schedule Being Developed
- Broadcast on Create Channel, Archived on IdahoPTV.org
- Partnered with IDLA, SDE, IBE, SBoE, Idaho Office on Refugees, English Language Centers

Fall Education Response

- Special Programming for Grades 7-12 on Create Channel in PM
- Online Workshops on Using PBS LearningMedia and Other Distance Learning Tools
- Enhanced Parent Material via Text & Web
- Online Book Club for Children
- Parents in Prison Program (COVID is making it harder)
- Kindergarten Readiness Kits
- Continuing Teacher Community Program
- Continue American Graduate Program

Appropriated Funding FY 2021 – Original - HB 579
$8,783,100

Statewide Delivery System

- Deliver content to nearly every Idaho household
- Support education
- Emergency communications
- Deliver government

  (*Idaho In Session*)

Educational Content

- National and Regional Programming
- Local Program Creation
- Online Resources
- Educational Outreach

Miscellaneous Funds
$6,054,800

State General Funds
$2,678,300
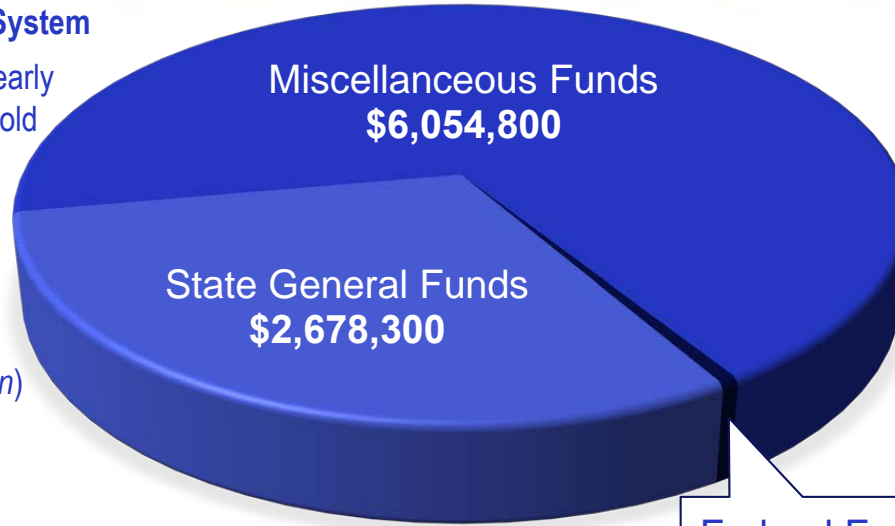
Federal Funds
$50,000

Appropriated Funding FY 2021 - Revised
$9,233,913

Statewide Delivery System

- Deliver content to nearly every Idaho household
- Support education
- Emergency communications
- Deliver government

  (*Idaho In Session*)

Educational Content

- National and Regional Programming
- Local Program Creation
- Online Resources
- Educational Outreach

Miscellaneous Funds
$6,054,800

State General Funds
$2,544,385
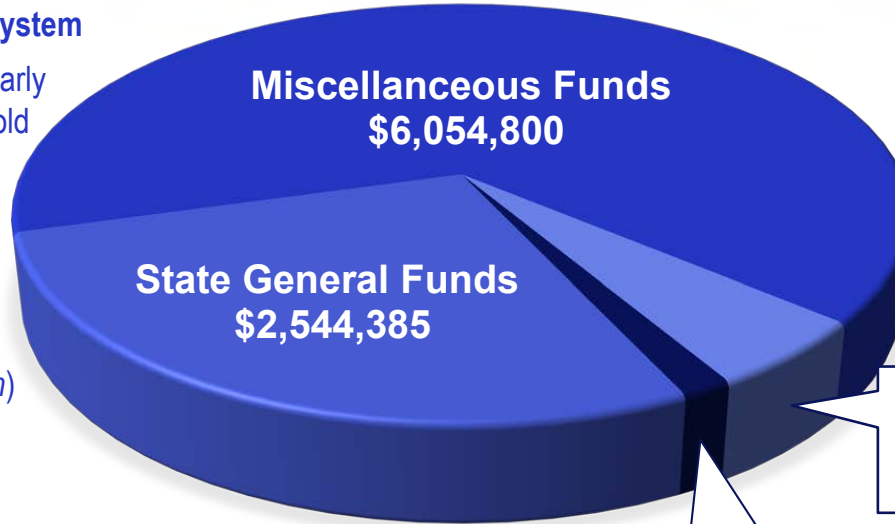
CARES Act (GEER) Funds
$489,728

Federal Funds[1]
$145,000

[1] Federal Funds includes a non-cog request currently under review by the Idaho Division of Financial Management for $95,000 in federal spending authority. The request relates to IdahoPTV's portion of AEYC's Preschool Development – Birth through Five grant

Challenges to Idaho Public Television

- Impact of Pandemic on Staff – Can't Work in Crisis Mode Forever
- What Happens if Staff Contract Covid-19 – Limited Staff in Critical Positions
- No Capital Replacement Funds for Second Year
- Concerns About Economic Impact on Fund-Raising
- Many Staff Reaching Retirement Age – Recruiting Talent, Succession Planning Working Group
- Inability to Work with Families and Teachers in Person
Lack of Connectivity

IDAHO PBS
PUBLIC TELEVISION

Questions

IDAHO PBS
PUBLIC TELEVISION

DIVISION OF CAREER TECHNICAL EDUCATION

SUBJECT
Annual report

REFERENCE

February 2020	Board adopted the recommendation of the Career Technical Education Work Group and directed individual implementation steps be brought back to the full Board for final approval.
March 2020	Board approved the FY2020 Strengthening Career and Technical Education for the 21st Century Act State Plan.
June 2020	Board approved a recommendation to the Governor to provide a portion of the GEER Funds for use by the Division of Career Technical Education.

APPLICABLE STATUTE, RULE, OR POLICY
Idaho State Board of Education Governing Policies & Procedures, Section I.M.3.

BACKGROUND/DISCUSSION
This agenda item fulfills the Board's requirement for the Division of Career Technical Education (Division) to provide a progress report on the agency's strategic plan, details of implementation, status of goals and objectives and information on other points of interest in accordance with a schedule and format established by the Board's Executive Director.

Clay Long, State Administrator of the Division, will provide an overview of Division's progress in carrying out the agency's strategic plan.

ATTACHMENTS
Attachment 1 – 2019 Year in Review
Attachment 2 – Draft Presentation
Attachment 3 – CTE Organizational Chart
Attachment 4 – CTE Advisory Committee

STAFF COMMENTS AND RECOMMENDATIONS
The Division of Career Technical Education provides leadership, administrative and technical assistance, and oversight for career technical education programs in Idaho's public secondary schools and technical colleges. The Division is responsible for approximately $78M in state and federal funds for Idaho's career technical education programs.

BOARD ACTION
This item is for informational purposes only.

2019
IN REVIEW

IDAHO
Career & Technical
Education

IDAHO CAREER & TECHNICAL EDUCATION
cte.idaho.gov | Clay Long, State Administrator - claylong@cte.idaho.gov

2019

2019 in Review
Secondary Statewide Enrollment

IDAHO
Career & Technical Education

- **701** Total Programs
- **142** School Districts
- **17** Career & Technical Schools

Total Course Enrollment: 95,767*
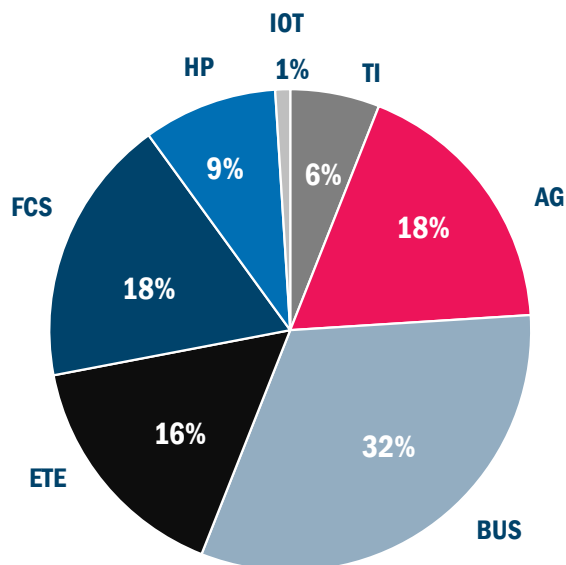
- **Agriculture, Food & Natural Resources (16,870)**
- **Business & Marketing (30,784)**
- **Engineering & Technology Education (15,354)**
- **Family & Consumer Sciences and Human Services (16,837)**
- **Health Professions and Public Safety (8,290)**
- **Individualized Occupational Training (1,490)**
- **Trades & Industry (6,142)**

Positive Placement: 95% of high school CTE concentrators in Idaho successfully found jobs (26%), continued their education (64%), or joined the military (5%).

Advanced Opportunities: 3,736 students were enrolled in CTE courses where students were eligible to earn technical competency credits.

Career & Technical Student Organizations: 15,326 secondary students participated in seven student organizations.

Career & Technical Concentrators: 5,415 juniors or seniors enrolled in the culminating, capstone course of a pathway program.

***63,207** unique career & technical education students (based on EDUID)

2019 in Review

Secondary Enrollment Trends
(fiscal year)

IDAHO

Career & Technical
Education

Secondary Statewide Totals	2013	2014	2015	2016	2017	2018	2019
CTE Course Enrollment	74,419	71,741	71,601	71,330	76,605	84,038	84,674
CTS Course Enrollment (intermediate/capstone classes)	10,004	11,285	13,597	11,362	10,132	9,812	11,093
Secondary Total Course Enrollment	84,423	83,026	85,198	82,692	86,737	93,850	95,767
Technical Skills Assessment Pass Rate (goal 67%)	73%	73%	72%	72%	56%*	68%	67%
Workforce Readiness Assessment Pass Rate (goal 75%)	NA	NA	NA	75%	79%	89%	86%
SkillStack® Badges Awarded**	NA	NA	NA	NA	1,674	6,755	6,320
CTE Digital Enrollment	NA	NA	NA	207	871	1,251	1,694***

Secondary Enrollment

⟫ **96% of CTE concentrators graduated from high school.**

⟫ **64% of high school CTE concentrators went on to college, compared to 48% of all Idaho graduates.**

*Change in methodology due to program alignment efforts and standardizing assessments.

**Idaho SkillStack® is a digital badging or micro-credentialing platform that allows Idaho's public education institutions to validate the predefined skills and competencies individuals demonstrate proficiency in.
*** Information updated on 1/31/2020

2019 in Review
Postecondary Statewide Enrollment

IDAHO
Career & Technical Education

4 **Technical Colleges at Community Colleges**
College of Eastern Idaho, College of Southern Idaho, College of Western Idaho, and North Idaho College

2 **Technical Colleges at Four-Year Colleges**
Idaho State University and Lewis-Clark State College

AAS/Certificate (Headcount): 5,234

Workforce Training (Headcount): 54,032

Total Enrollment: 59,266

FY 2019	Total	CEI	CSI	CWI	ISU	LCSC	NIC
AAS/Certificate Enrollment							
Student FTE	**3,321**	419	672	639	919	267	405
Year End Credits	**99,643**	12,568	20,157	19,178	27,580	7,999	12,161
Headcount	**5,234**	690	973	1,100	1,333	344	794
Number of Programs	**167**	19	40	29	30	23	26
Workforce Training							
Headcount	**54,032**	16,236	10,553	8,127	7,952	3,699	7,001
AAS/Certificate Enrollment and Worforce Training Totals							
Headcount	59,266	16,926	11,526	9,227	9,285	4,043	7,795

Positive Placement: 95%* of technical college completers found jobs, continued their education, or joined the military. 62% obtained training-related employment.

Degrees and Certificates: 1,670 students graduated from the Idaho technical college system with postsecondary degrees and certificates.

* Information updated on 3/12/2020

2019 in Review
Postsecondary Enrollment Trends
(fiscal year)

IDAHO
Career & Technical
Education

Postsecondary by Institution		2013	2014	2015	2016	2017	2018	2019
College of Eastern Idaho								
AAS/Certificate	Student FTE	531	514	514	461	467	484	419
	Headcount	1,240	1,198	1,196	1,013	1,008	868	690
Workforce Training	Headcount	11,789	11,446	11,289	11,662	10,549	14,824	16,461
College of Southern Idaho								
AAS/Certificate	Student FTE	961	894	816	768	698	703	672
	Headcount	1,354	1,190	1,097	1,049	1,084	1,000	973
Workforce Training	Headcount	3,398	3,137	4,333	9,768	6,459	8,482	10,553
College of Western Idaho								
AAS/Certificate	Student FTE	780	821	739	685	740	743	639
	Headcount	1,564	1,322	1,499	1,345	978	1,249	1,100
Workforce Training	Headcount	8,163	8,295	8,038	8,104	8,741	9,150	8,366

Postsecondary Enrollment

2019 in Review

Postsecondary Enrollment Trends
(fiscal year)

IDAHO
Career & Technical
Education

Postsecondary by Institution		2013	2014	2015	2016	2017	2018	2019
Idaho State University								
AAS/Certificate	Student FTE	960	870	821	787	755	739	919
	Headcount	1,857	1,664	1,563	1,436	1,340	1,252	1,333
Workforce Training	Headcount	12,334	9,624	6,759	9,575	9,621	8,106	7,952
Lewis-Clark State College								
AAS/Certificate	Student FTE	410	361	317	317	358	315	267
	Headcount	659	576	502	468	436	391	344
Workforce Training	Headcount	3,165	3,500	3,471	2,887	3,345	3,563	3,699
North Idaho College								
AAS/Certificate	Student FTE	707	660	596	494	486	416	405
	Headcount	1,083	1,105	1,036	984	908	837	794
Workforce Training	Headcount	4,638	3,649	4,018	5,916	6,086	6,672	7,001

Postsecondary Enrollment

		2013	2014	2015	2016	2017	2018	2019
Postsecondary Totals								
AAS/Certificate	Student FTE*	4,349	4,120	3,803	3,512	3,505	3,400	3,321
	Headcount	7,757	7,055	6,893	6,295	5,754	5,597	5,234
Workforce Training	Headcount	43,487	39,651	37,908	47,912	44,801	50,797	54,032
Fire Service Technology	Headcount	4,519	3,748	3,454	4,935	4,709	4,726	5,098
SkillStack® Badges**	Awarded	NA	NA	NA	3	624	1,073	727

* **Statewide totals** may be slightly different than totals reported earlier due to updates provided by institutions. FTE totals may be slightly different from individual totals reported due to rounding. **Enrollments** are unduplicated.

** Idaho SkillStack® is a digital badging or micro-credentialing platform that allows Idaho's public education institutions to validate the predefined skills and competencies individuals demonstrate proficiency in.

2019 in Review
Postsecondary Statewide Enrollment

IDAHO
Career & Technical
Education

Apprenticeships	Total	CEI	CSI	CWI	ISU	LCSC	NIC
Total Completers	2,727	239	286	1,444	130	122	506
Total Students	3,153	271	314	1,694	167	144	563
Completion Rate	86%	88%	91%	85%	78%	85%	90%
Degrees/Certificates*	**Total**	**CEI**	**CSI**	**CWI**	**ISU**	**LCSC**	**NIC**
Basic Technical Certificate	281	1	67	179	15	3	16
Intermediate Technical Certificate	363	84	85	91	31	2	70
Advanced Technical Certificate	102	19	N/A	10	61	5	7
Associate of Applied Science	924	132	203	198	225	55	111
Total	1,670	236	355	478	332	65	204
Positive Placement**	**Total**	**CEI**	**CSI**	**CWI**	**ISU**	**LCSC**	**NIC**
Number Responding	1,416	193	373	295	362	56	137
Military	6	N/A	N/A	5	N/A	N/A	1
Employed - Related	909	146	171	194	269	30	99
Employed - Not Related	145	16	11	55	36	5	22
Continuing Education	281	28	184	16	34	16	3
Total w/Postive Placement	1,341	190	366	270	339	51	125
Positive Placement Rate	95%	98%	92%	92%	94%	91%	91%

Apprenticeships
Degrees / Certificates
Positive Placement

* Definitions of Degrees/Certificates
  • Basic Technical Certificate ≥ 8 semester credits
  • Intermediate Technical Certificate ≥ 30 semester credits
  • Advanced Technical Certificate ≥ 52 semester credits
  • Associate of Applied Science ≥ 60 semester credits
** Information updated on 3/12/2020

2019 in Review
Financial Overview

IDAHO
Career & Technical Education

ICTE received appropriations of $75,963,200 for fiscal year 2019 and had 41 employees.

Funding Sources

- 1%
- 12%
- 87%

■ Federal Grants
■ State General Fund
■ Other

Uses of Funds

- 1%
- 5%
- 8%
- 22%
- 64%

■ Agency Operations
■ Postsecondary Programs
■ Secondary Programs
■ Adult Education
■ Other

Agency Operations

- 1%
- 28%
- 71%

■ Operating Expenses
■ Personnel Costs
■ Capital Replacement

Funding Allocation

- 1%
- 5%
- 94%
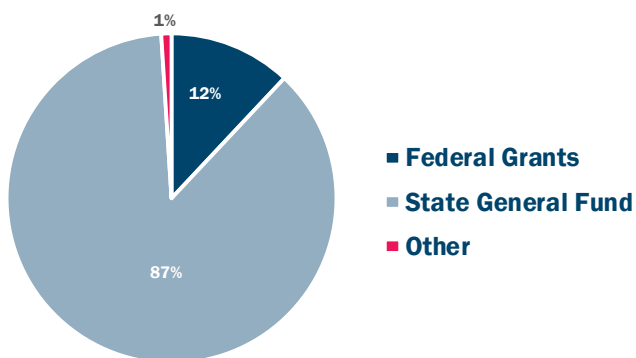
■ Program Distributions
■ Agency Operations
■ Program Support
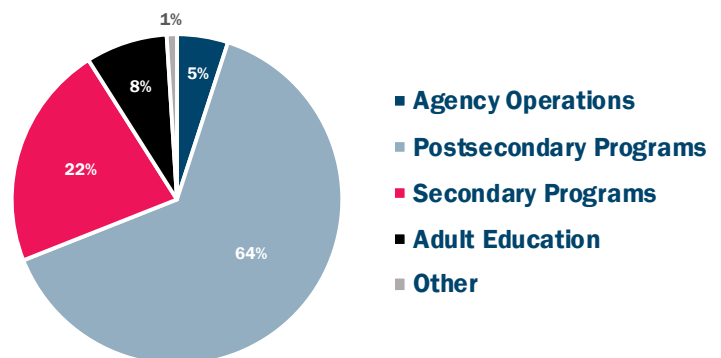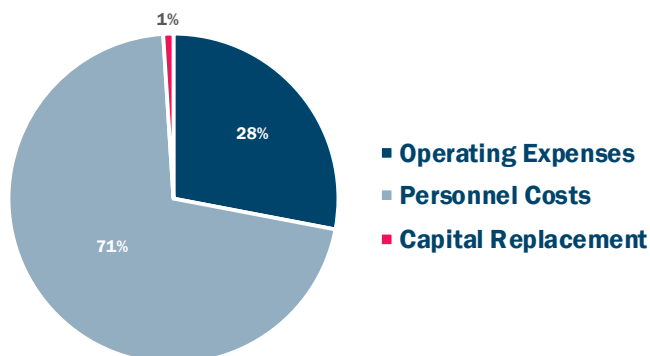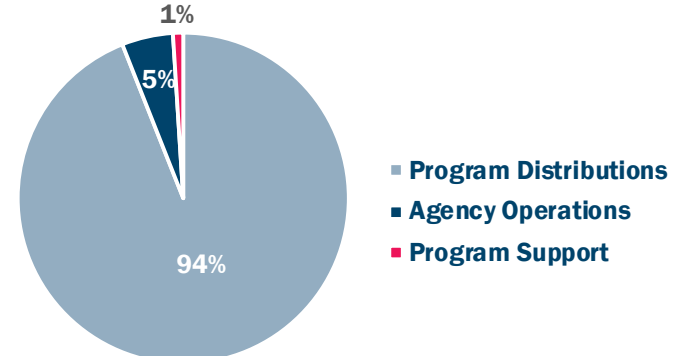
Educational Programs and Services Support

Secondary Programs	Other Educational Programs	Related Services Programs
Added-Cost Operating Support $12,700,800	Teacher Pipeline Development $566,700	Adult Education $3,657,500
Perkins Grant Programs $3,275,300	Program Alignment $260,000	Workforce Training Centers $1,233,100
Program Quality Initiatives $600,000	• Student Organizational Development • SkillStack® Microcertification in Idaho • REACH Professional Development • BASIC Training	Centers for New Directions $170,000
Agriculture and Natural Resources $325,000		• Fire Safety Training • Hazardous Materials Safety • Motorcycle Safety Training

Division of Career Technical Education

Annual Report to the State Board of Education

Aug. 26, 2020

Clay Long, Ph.D.

State Administrator

We prepare Idaho's youth and adults for high-skill, in-demand careers.

IDAHO

Career & Technical Education

Why Do We Serve?

Provide a talent pipeline for Idaho's businesses.

Who Do We Serve?

High school

Postsecondary

Adult education

Events Shaping Career Technical Education

2001
Secondary Program Added Cost Funding Framework finalized

2008
Secondary Programs of Study based on federal Perkins IV definitions

2012
Study conducted on statewide articulation (developed 2014)

2014
Advanced opportunities, professional technical exams & dual credit for technical courses

2018
Perkins V passes Congress

2018
Middle School CTE development approved by ID Legislature

2005

2015

2000

2010

2020

2002
Idaho Digital Learning (IDL) authorized by the ID Legislature

2010
Secondary Program Added Cost Funding updated

2014
SkillStack Badging System introduced

2014
IDL courses expanded to include CTE in an online format

2019
Advanced opportunities expanded to include non-credit Workforce Training

2019
CTE Educator Certification oversight transferred to the Division

IDAHO
Career & Technical Education

Workgroup Recommendations

Recommendations

- **Program management**
  - Overcentralized decision making
  - Lack of two-way communication

- **Program execution**

- Policy implementation and procedures prevent the Division and CTE programs from adjusting quickly enough to meet needs

Implementation

- State Board of Education
  - Policy recommendations

- Division of CTE
  - Implementation recommendations

Program Management

- Organizational structure
  - Regional CTE committees

- Management and communication
  - Improvement of communication
  - New CTE Administrator Mentorship program
  - Resume program reviews
  - Increased stakeholder involvement in decision-making
  - Increased secondary and postsecondary collaboration
  - Next Steps platform
  - Statewide campaign to highlight career technical education
  - Staffing functions
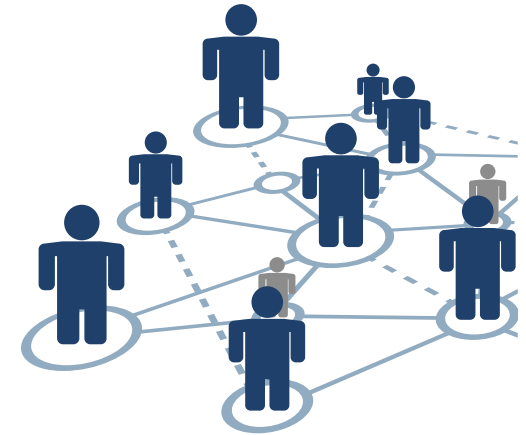
Program Execution

- Alignment with workforce needs
  - Maximum flexibility to districts and program prioritization
  - Streamlined process for identify demand-driven programs

- Postsecondary matriculation and credit articulation
  - Vertical alignment and consistency on courses
  - Processes for admission preference to high school completers

- Program delivery
  - Incentive and support shared delivery models for rural districts
  - Develop innovative models to expand CTE programs in remote districts
  - Support efforts of online and hybrid delivery
  - Support teacher development for online delivery
  - Maximize online and hybrid delivery options

Program Execution

- Educator pipeline and certification
  - Evaluate process for certifying industry professionals
  - Interpret and implement rules and policies to grant maximum flexibility
  - Provide additional technical assistance to support new educators
  - Create or re-assign a position to focus on CTE educator recruitment

Accomplishments

- SkillStack®
  - Open Badges 2.0 certified
  - More than 11,000 badges earned in SY19-20
- Perkins V
- Division restructure
  - Administration
  - Educator services
  - Program services

Senate Bill 1329

- Industry to education
- Secondary experience recognition
- Clarifying $3K LOS stipend
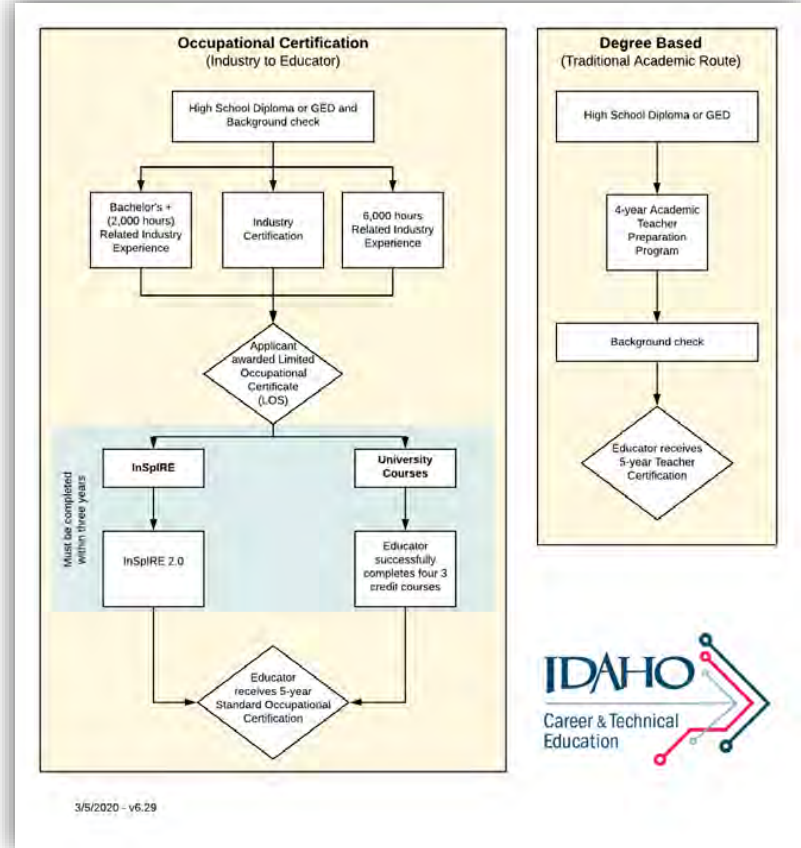
Challenges

- Limited ability for program growth
- Program delivery in rural and remote areas
- Postsecondary enrollment
- Educator recruitment

COVID-19 Challenges

- Program delivery
  - Secondary
  - Postsecondary
  - Adult
  - Center for New Directions
  - Workforce Training Centers

- GEER funding

2021 Priorities

- Strengthening our commitment to customer services
  - Statewide CTE Advisory Council
- Being responsive to our state and local workforce needs
- Expanding access in rural and remote Idaho
- Supporting and advancing middle school programs
- Focusing on educator pipeline

IDAHO
Career & Technical Education

Questions?

Clay Long, State Administrator

clay.long@cte.Idaho.gov | 208-334-3216

Division of Career Technical Education
Organizational Structure

Idaho State
Board of Education

IDAHO
Career & Technical
Education

Clay Long
Administrator
Administration

Dona Orr
Director
Professional Development

Kristi Enger
Director
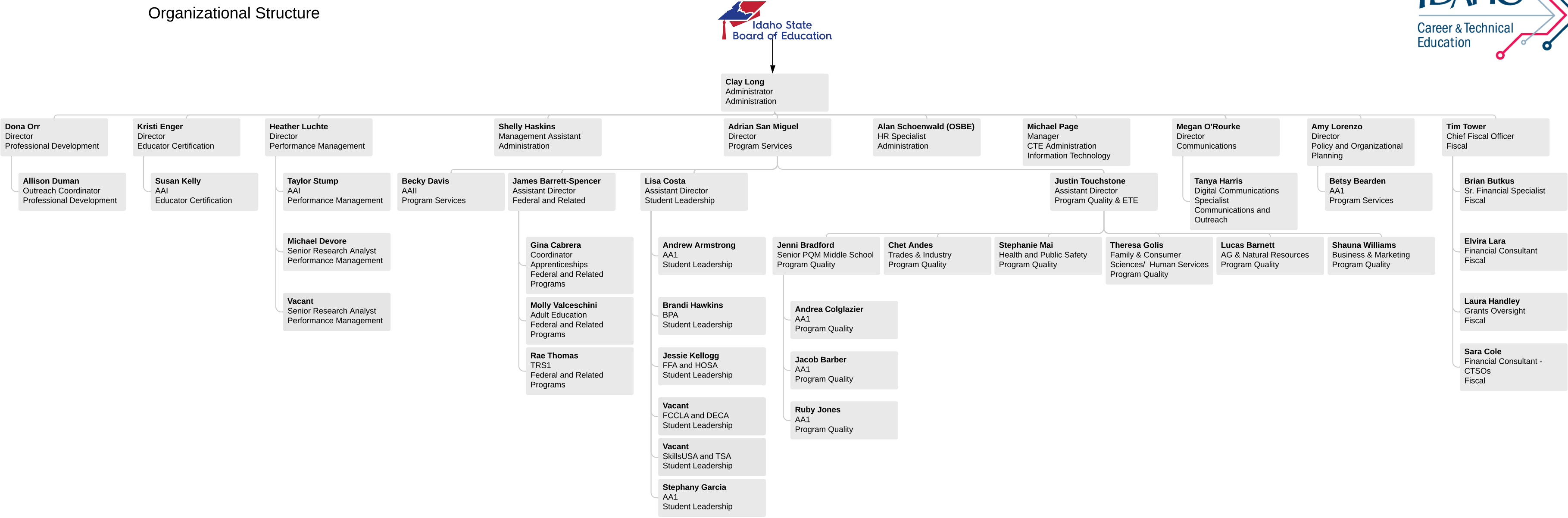Educator Certification

Heather Luchte
Director
Performance Management

Shelly Haskins
Management Assistant
Administration

Adrian San Miguel
Director
Program Services

Alan Schoenwald (OSBE)
HR Specialist
Administration

Michael Page
Manager
CTE Administration
Information Technology

Megan O'Rourke
Director
Communications

Amy Lorenzo
Director
Policy and Organizational
Planning

Tim Tower
Chief Fiscal Officer
Fiscal

Allison Duman
Outreach Coordinator
Professional Development

Susan Kelly
AAI
Educator Certification

Taylor Stump
AAI
Performance Management

Becky Davis
AAII
Program Services

James Barrett-Spencer
Assistant Director
Federal and Related

Lisa Costa
Assistant Director
Student Leadership

Justin Touchstone
Assistant Director
Program Quality & ETE

Tanya Harris
Digital Communications
Specialist
Communications and
Outreach

Betsy Bearden
AA1
Program Services

Brian Butkus
Sr. Financial Specialist
Fiscal

Michael Devore
Senior Research Analyst
Performance Management

Gina Cabrera
Coordinator
Apprenticeships
Federal and Related
Programs

Andrew Armstrong
AA1
Student Leadership

Jenni Bradford
Senior PQM Middle School
Program Quality

Chet Andes
Trades & Industry
Program Quality

Stephanie Mai
Health and Public Safety
Program Quality

Theresa Golis
Family & Consumer
Sciences/ Human Services
Program Quality

Lucas Barnett
AG & Natural Resources
Program Quality

Shauna Williams
Business & Marketing
Program Quality

Elvira Lara
Financial Consultant
Fiscal

Vacant
Senior Research Analyst
Performance Management

Molly Valceschini
Adult Education
Federal and Related
Programs

Brandi Hawkins
BPA
Student Leadership

Andrea Colglazier
AA1
Program Quality

Laura Handley
Grants Oversight
Fiscal

Rae Thomas
TRS1
Federal and Related
Programs

Jessie Kellogg
FFA and HOSA
Student Leadership

Jacob Barber
AA1
Program Quality

Sara Cole
Financial Consultant -
CTSOs
Fiscal

Vacant
FCCLA and DECA
Student Leadership

Ruby Jones
AA1
Program Quality

Vacant
SkillsUSA and TSA
Student Leadership

Stephany Garcia
AA1
Student Leadership

Updated: 7/27/2020

State Board of Education
Idaho Division of Career Technical Education
CTE Advisory Council Members
September 2020 – August 2021

Membership Role	Name	Position	Organization
Board	Linda Clark	Chair of PPGA	State Board of Education
Board	Sherri Ybarra	Superintendent of Public Instruction	Idaho State Department of Education
Idaho Career Technical Education	Clay Long	State Administrator	Idaho Division of Career Technical Education
Idaho Workforce Development Council	Wendi Secrist	Executive Director	Idaho Workforce Development Council
Student Representative		President	Idaho Joint Student Leadership
Career Technical Educators of Idaho President	Kelly Steely	President	College of Western Idaho
Secondary Leadership (CTS Admin Chair)	Colby Mattila	Chair	Kootenai Technical Education Campus (KTEC)
Secondary (Faculty)	Lex Godfrey	Educator	Rigby High School
Postsecondary (TCLC Chair)	Scott Rasmussen	Chair	Idaho State University
Postsecondary (Faculty)	Rodney Farrington	Educator	Lewis-Clark State College
Employer	Alex LaBeau	President	Idaho Association of Commerce and Industry
Employer	Bob Solders	Finished Product Superintendent	Clearwater Paper
CTE Teacher Educator Programs*	Brenda Jacobsen	Teacher Educator	Idaho State University
Department of Labor	Tina Polishchuck	Program Operations Manager	Idaho Job Corps
Department of Corrections	Bree Derrick	Deputy Director	Department of Corrections
Legislator	Wendy Horman	Representative	Idaho House of Representatives
Legislator	Dave Lent	Senator	Idaho Senate

* Representative from Idaho's CTE Teacher Educator Programs will rotate between University of Idaho (odd years) and Idaho State University (even years).

IDAHO DIGITAL LEARNING ACADEMY

SUBJECT
Idaho Digital Learning Academy Annual Report

APPLICABLE STATUTE, RULE, OR POLICY
Section 33-5501, Idaho Code
Idaho Administrative Code, IDAPA 08.04.01 Rules Governing the Idaho Digital Learning Academy

BACKGROUND/DISCUSSION
According to Administrative Code, IDAPA 08.04.01 Rules Governing the Idaho Digital Learning Academy, an annual report is required to be submitted each year to the State Board of Education. The report must include at a minimum a copy of the Idaho Digital Learning Academy's Acceptable Use Policy and Fee Schedule. This report will include Accreditation, Acceptable Use, and an Idaho Digital Learning Academy fee schedule in order to be in compliance with statute and State Board rule.

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

IMPACT
Idaho Digital Learning served 35,288 enrollments for 2019-2020, which is a 7% increase from 2018-2019. 99% of the school districts in Idaho participated in 2019-2020. The number one reason for taking Idaho Digital Learning courses is *classes not offered locally*. Other reasons include: scheduling conflicts; advanced placement; dual credit; early graduation; foreign languages; and credit recovery.

ATTACHMENTS
Attachment 1 – Fee Policy Statement
Attachment 2 – Acceptable Use Policy
Attachment 3 – Accreditation Confirmation

STAFF COMMENTS AND RECOMMENDATIONS
The Idaho Digital Learning Academy (IDLA) was established by the legislature in Idaho statute in 2002 through the enactment of the Idaho Digital Learning Academy Act of 2002. Pursuant to Section 33-5502, Idaho Code, the IDLA was created as "a public school-choice learning environment which joins the best technology with the best instructional

practices. The IDLA as provided for in this chapter, is not a single department of state government unto itself, nor is it a part of any of the twenty (20) departments of state government authorized by section 20, article IV, of the constitution of the State of Idaho, or of the departments prescribed in section 67-2402, Idaho Code. It is legislative intent that the Idaho Digital Learning Academy operate and be recognized not as a state agency or department, but as a governmental entity whose creation has been authorized by the state, much in the manner as other single purpose districts." The IDLA is further defined Section 33-5505, Idaho Code as follows:

> (3) "Idaho Digital Learning Academy" means an online educational program organized as a fully accredited school with statewide capabilities for delivering accredited courses to Idaho resident students at no cost to the student unless the student enrolls in additional courses beyond full-time enrollment. Participation in the academy by public school students shall be in compliance with academy and local school district policies. Adult learners and out-of-state students shall pay tuition commensurate with rates established by the State Board with the advice of the superintendent, and such funds shall be included in the budget and audit of the academy's fiscal records.

While the IDLA provides direct instruction to students through online courses and content, it is not considered a school in the same sense as a school that is part of a traditional school district or a public charter school. The IDLA provides online courses as a service to our public schools, and students access their courses through the public school in which they are enrolled. In order to access IDLA courses the student must follow the policies established by their school of attendance and only has access to those courses the school district or charter school has identified. IDLA courses are transcripted by students' school of attendance.

BOARD ACTION
This item is for informational purposes only.

IDAHO DIGITAL LEARNING ACADEMY FEE POLICY

Fees for Idaho Digital Learning Academy: The fee schedule for 2019-2020 is determined upon a per-enrollment basis. An "enrollment" is defined as one (1) student enrolled into one (1) Idaho Digital Learning Academy course. Idaho Digital Learning Academy enrollment fees outlined in this Fee Policy apply to all courses offered through Idaho Digital Learning Academy unless noted otherwise below.

Idaho Digital Learning Academy Per-Enrollment Cost: The cost for one (1) enrollment is $75 for Idaho students.

Advanced Placement/Dual Credit Courses: Courses designated as "Advanced Placement or Dual Credit" will not incur a per-enrollment cost, unless courses are delivered in a custom session (see Custom Session Courses below).

In collaboration with Idaho Digital Learning Academy, School Districts shall assist students with the obtainment of college credit, examinations, and materials such as textbooks (see Textbooks below).

Custom Session Courses: Any courses requested and implemented through Idaho Digital Learning Academy's Custom Course program will incur costs based on the Custom Session Policy (see Idaho Digital Learning Academy website for MOU Addendum and request form). This includes district requests for Hybrid Custom Sessions. Requirements for custom sessions include a minimum enrollment threshold and cost.

Custom Session Courses: Any courses requested and implemented through Idaho Digital Learning Academy Custom Course program will incur costs based on the following:

Total Number of Students in the Section	Regular Cohort Courses	DC and AP Courses	Hybrid (with video conferencing)	Middle School Pathways, Keyboarding, STEM Careers, 8th gr. Career Exploration, and CS Discoveries (full course/half course)	Elementary Pathways
Flat Fee Up to 12 enrollments with no extra cost	$900	$900	$1500 minimum of 20 students	$360 / $180	$360
13-25	$75 each	$0	$75 each	$30 / $15 each	$30
$26+	60 each	$0	$60	$30 / $15 each	$30

Middle School Keyboarding and Middle School Pathways to Success and 8th Grade Career Explorations: Idaho Digital Learning Academy will offer Middle School Keyboarding, Pathways, and Career Explorations at $30 per enrollment. Any middle school courses in which half the content is delivered (4 units) the Idaho Digital Learning

Academy fee is further reduced to $15 per enrollment.

Textbooks: Idaho Digital Learning Academy provides online textbooks in the majority of content areas and provides access to Libraries Linking Idaho (LiLI-D). In cases where an online textbook is unavailable, the local school district may be responsible to provide the required text(s) according to school district policy. For example, advanced placement, dual credit, and English courses may require additional textbooks or required readings not available online. The local school district is also responsible to provide access and assistance to library media centers if necessary. Please refer to the Idaho Digital Learning Academy Course Catalog posted at www.IdahoDigitalLearning.org for a list of required textbooks.

IDAHO DIGITAL LEARNING ACADEMY REFUND POLICY

Idaho Digital Learning Academy requires that all drops are requested or confirmed by the Site Coordinator during the school year. Drop requests initiated by a parent or guardian will be accepted for summer courses only. For a course fee to be eligible for refund and for a student to be exempt from a grade report, a drop must be initiated during the following times:

- **All cohort sessions:**
  - **Orientation:** If the student does not complete orientation, they will not be enrolled in classes and a full refund of fees will be granted.
  - **12 week or Custom Sessions:** The Idaho Digital Learning Academy Office must be notified by Friday of the 2nd week of class to receive a full refund and remove the student from the course.
  - **16 week session:** The Idaho Digital Learning Academy Office must be notified by Friday of the 3rd week of class to receive a full refund and remove the student from the course.
- **Flex sessions:**
  - The drop deadline for all flex classes is 14 days after the student begins the course.
  - If a student is inactive in class for a period of 14 consecutive days, the instructor may initiate a drop process. The Site Coordinator can confirm the drop or request additional time for the student to become active in the course.
- **Course Withdrawals:**
  - A course fee will not be assessed, nor will a final grade be reported to the local school if a student is withdrawn from a course prior to the drop/fee deadline. ○ Students that are withdrawn from a course after the drop deadline, will have a "W" reported to the local school, and full course fees will be assessed.

Exceptions to the drop-deadline may be requested by the district for extenuating circumstances.

<div align="right">**ATTACHMENT 2**</div>

IDAHO DIGITAL LEARNING ACADEMY ACCEPTABLE USE POLICY

Proper use and behavior in a distance learning environment will be determined by your school's existing guidelines covered in the district's Acceptable Use Policy (AUP) and the Idaho Digital Learning Academy's Acceptable Use of Technology Policy.

Idaho Digital Learning Academy Acceptable Use of Technology Policy (AUP)

Computers, computer networks and the internet provide essential tools that support distance learning and Idaho Digital Learning Academy. All students are expected to use Idaho Digital Learning Academy and the resources provided to access Idaho Digital Learning Academy for purposes appropriate to the education environment.

You must refrain from any use that is not consistent with the policies, purposes or objectives of either the hosting district or Idaho Digital Learning Academy.

Prohibited uses of technology

The use of communication tools (email, discussion boards, web pages, chat, and others) should not be used for any communication that is:
- defamatory
- inaccurate
- abusive
- rude
- obscene
- profane
- sexually explicit
- threatening
- harassing
- racially offensive
- illegal
- encouraging the use of illegal materials
- inconsistent with the policies, purposes or objectives of either the hosting district or Idaho Digital Learning Academy

- Impersonating another individual, including, but not limited to, the use of another user's login or password, communicating or completing work on behalf of another individual, or mocking others in a derogatory manner.

- Revealing personal or private information to others such as home address, age, gender, phone number, etc. You should also be cautious when releasing this information about yourself.

- Disrupting the use of technology by another user or service. This includes, but is not limited to, attempts to harm or destroy data, uploading and/or creating computer viruses,

uploading and/or downloading information without need, sending or receiving of data with the intent to degrade network performance, etc.

- Violation of any local, state, or federal regulation or statute.

- You will not use Idaho Digital Learning Academy resources to sell or offer to sell any goods or services without prior approval of both the hosting district Board and the Idaho Digital Learning Academy board.
Idaho Digital Learning Academy Rights and Responsibilities.

- Idaho Digital Learning Academy reserves the right to monitor all activity related to Idaho Digital Learning Academy courses or sites.

- Idaho Digital Learning Academy reserves the right to block or remove any material that is not consistent with policies, purposes, or objectives of either the host district or Idaho Digital Learning Academy.

- Opinions, advice, services and all other information expressed by Idaho Digital Learning Academy staff, students, information providers or instructors are those of the individual and do not represent the position of Idaho Digital Learning Academy.

Discipline

Student discipline for violation of any part of the policies, rules, or procedures of Idaho Digital Learning Academy shall be based on the severity of the infraction.

- If the Idaho Digital Learning Academy teacher or monitor feels your behavior is not consistent with the policies, purposes, or objectives of the hosting district, or Idaho Digital Learning Academy, the teacher will notify your site coordinator.

- The site coordinator is then responsible for bringing the matter before the appropriate school administrator(s) for disciplinary action.

- The teacher may also wish to hold a conference with you and your parents.

- The Idaho Digital Learning Academy board of directors also reserves the right to enact additional disciplinary action including the ability to revoke the offending student's privilege of using Idaho Digital Learning Academy.

Accreditation Confirmation

SUBJECT
Idaho Indian Education Committee Update

REFERENCE

February 2014	The Board received an update on committee progress and activities.
October 2014	The Board received a presentation on the four school districts with the highest American Indian student population highlighting the gaps of academic achievement for American Indian students compared to their educational peers.
April 2016	The Board received a presentation on one of two State Tribal Education Partnership (STEP) grants, which addresses cultural standards and culturally responsive teaching.
June 2018	The Board authorized Idaho State University to pilot a new American Indian student fee during the 2018-2019 school year based on recommendations provided by the Idaho Indian Education Committee.

APPLICABLE STATUTE, RULE, OR POLICY
Idaho State Board of Education Governing Policies and Procedures, I.P. Idaho Indian Education Committee

BACKGROUND/DISCUSSION
The Idaho Indian Education Committee (IIEC) was established in 2013 and serves as an advisory committee to the State Board of Education (Board) and the State Department of Education (Department) on educational issues and how they affect Idaho's American Indian student population. The committee also serves as a link between American Indian tribes of Idaho. In June 2015 the Board approved the first ever Idaho Indian Education Strategic Plan consisting of two main goals. Those are: 1) American Indian Academic Excellence, and 2) Culturally Relevant Pedagogy. Associated with those goals the IIEC identified performance measures to increase Idaho's educational standards to include tribal culture, history, and government.

The mission of the IIEC is to create conditions for, and support the efforts of, raising the bar and eliminating the gap of academic achievement. Four of the seven key responsibilities of the Committee, identified in Board Governing Policies and Procedures, relate to making recommendations on American Indian achievement and overall pedagogy.

Committee members representing three key stakeholders (tribes, institutions of higher education, and K-12 education) will present an overview of six school districts with the highest American Indian student population highlighting the gaps of academic achievement for American Indian students compared to their educational peers, including college-going rates and advanced opportunities.

IMPACT

This presentation will provide the Board with a snapshot of the realities of the higher education system for American Indian students in Idaho and provide context for future recommendations from the Committee.

ATTACHMENTS

Attachment 1-Idaho Public Education Snapshot: American Indian Education

STAFF COMMENTS AND RECOMMENDATIONS

The Indian Education Committee is responsible, in part, for making recommendations to the Board and Department for educational policy as it relates to American Indian student access, retention, graduation, and achievement. The committee is working on updating the Indian Education Strategic plan to include a potential new goal on college and career readiness that will focus on ensuring public education systems in Idaho are in alignment to support the knowledge and skills necessary for students to pursue a successful life after high school. The Committee plans to present recommendations to the Board in the near future on how they may collaboratively work with stakeholders to achieve collective goals.

BOARD ACTION

This item is for information purposes only.

Idaho Public Education Snapshot: American Indian Education

Dr. Yolanda Bisbee

Chair, Idaho Indian Education Committee

August 27, 2020

Idaho Indian Education Committee

Tribal Chair/Designee

Dr. Chris Meyer, Coeur d'Alene Tribe

Gary Aitken, Jr, Kootenai Tribe

Dr. Mary Jane Miles, Nez Perce Tribe

Ladd Edmo, Shoshone-Bannock Tribes

TBD, Shoshone-Paiute Tribes

K-12 Tribal Representatives

Jesse LaSarte, Coeur d'Alene Tribe

TBD, Kootenai Tribe

Joyce McFarland, Nez Perce Tribe

Jessica James, Shoshone-Bannock Tribes

TBD, Shoshone-Paiute Tribes

BIA School Representatives

Tina Strong, Coeur d'Alene Tribal School

Hank McArthur, Shoshone-Bannock Jr./Sr. High School

Four-Year College/University Representatives

Dr. Leslie Webb, Boise State University

Dr. Rex Force, Idaho State University

Bob Sobotta, Jr., Lewis-Clark State College

Dr. Yolanda Bisbee, University of Idaho

Two-Year College Representatives

Jason Ostrowski, College of Southern Idaho

Jaime Barajas, College of Western Idaho

Effie Hernandez, College of Eastern Idaho

Dr. Graydon Stanley, North Idaho College

State Board of Education Representative

Dr. Linda Clark, Ex Officio

Staff support:

Johanna Jones
SDE

Patty Sanchez
OSBE

Strategic Plan

GOAL 1: AMERICAN INDIAN ACADEMIC EXCELLENCE

Ensure Idaho's American Indian students are afforded educational opportunities on an equitable basis; provide resources that promote and support an increase in the educational attainment among American Indian students.

GOAL 2: CULTURALLY RELEVANT PEDAGOGY

Ensure Idaho K-20 educational institutions will provide all educators with indigenous scholarship to recognize the distinct, unique knowledge and heritage of Idaho's American Indians.

GOAL 3: COLLEGE AND CAREER READINESS – Ensure public education systems are in alignment to support the knowledge and skills necessary to pursue a successful life after high school.

Strategic Plan Accomplishments

- *Idaho's Content Standards*
  - Social Studies Standards
  - Included accurate tribal histories

- *Idaho Standards for Initial Certification*
  - Standard 2 Learning Differences
  - Incorporated culturally relevant curriculum and teaching

- *Post-secondary Accessibility*
  - Successful partnership with ISU to establish a discounted course fee cost

- *Increased Representation on statewide committees*
  - American Indian Educator

American Indian K-12

Public School Student Population

LEAs with a 30% or more overall AI student population:

Plummer-Worley School District No. 44
Lapwai School District No. 341
Pocatello School District No, 25
Blackfoot School District No. 55
Chief Tahgee School District No. 483

- All Schools
  - *303,787*

- American Indian (within identified LEAs)
  - *1581*

American Indian Postsecondary Education in Idaho

■ Indian Education in Idaho for American Indian students through the lens of frontline workers.

- *Boise State University*

- *Shoshone-Bannock Tribes*

- *Coeur d'Alene Tribe*

Comparison of Go-on Rates

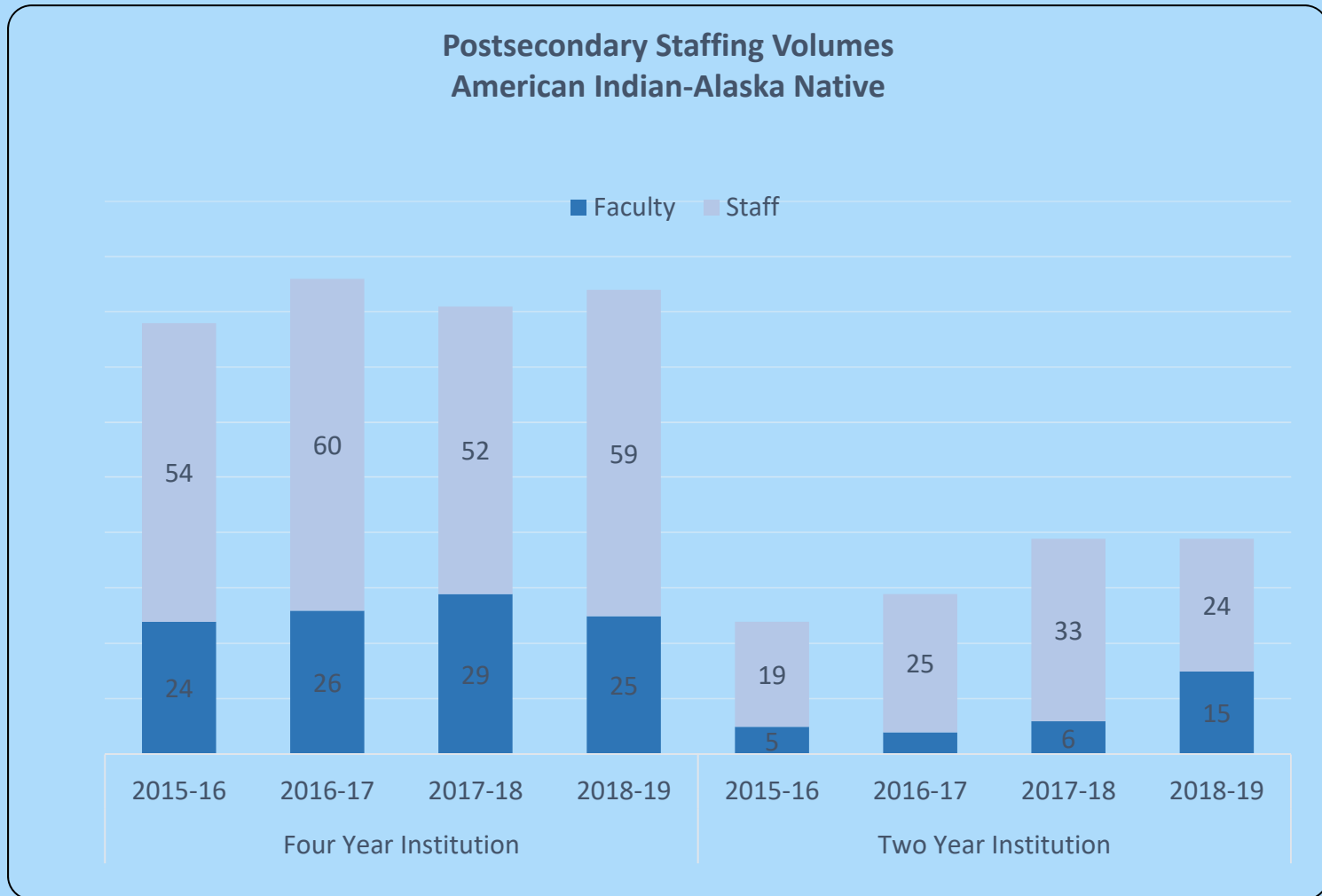| Total number of tribal students that go-on to college						
Percent of high school graduates who enroll in a postsecondary institution	**2014 graduates**	**2015 graduates**	**2016 graduates**	**2017 graduates**	**2018 graduates**	**Goal**
All students within 12 months of high school graduation	53%	53%	53%	53%	52%	At least 60%
American Indian/Alaska Native Within 12 months of graduation[1]	-	-	18%	36%	28%	
	2012 graduates	**2013 graduates**	**2014 graduates**	**2015 graduates**	**2016 graduates**	**Goal**
All students within 36 months of high school graduation	NA	NA	64%	64%	64%	At least 80%
American Indian/Alaska Native Within 36 months of graduation[1]	-	-	-	-	24%	

[1] Population limited to Districts 044, 341, 025, 055 and 483

Advanced Opportunities

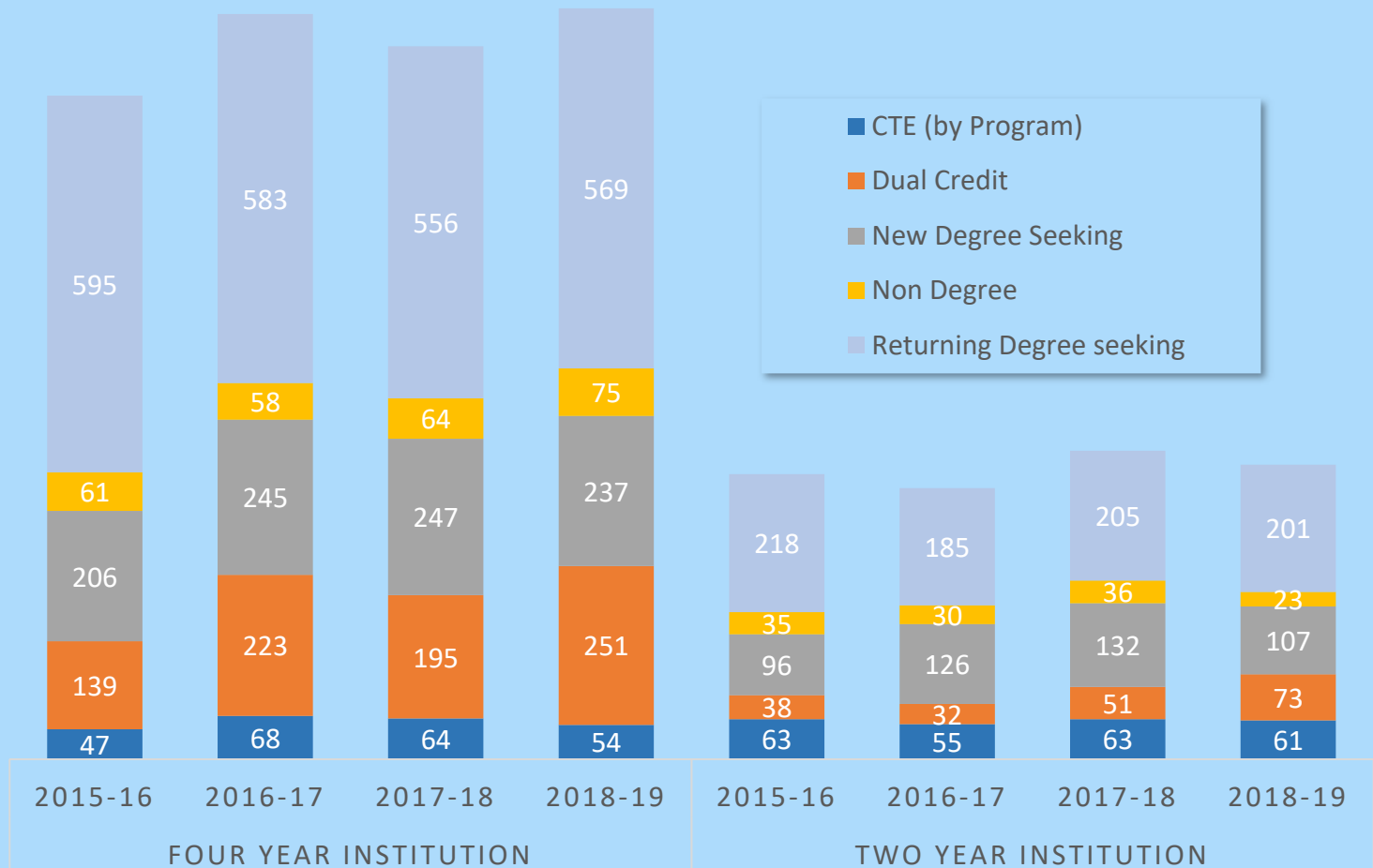| Total number of tribal students participating in Advanced Opportunities					
Percent of high school graduates who participated in one or more advanced opportunities	**2015 graduates**	**2016 graduates**	**2017 graduates**	**2018 graduates**	**2019 graduates**
Advanced Opportunities Participation Rate	84%	88%	90%	90%	91%
American Indian/Alaska Native Within 12 months of graduation[1]	-	-	-	91%	90%

American Indian Educators

Postsecondary Staffing Volumes
American Indian-Alaska Native

■ Faculty   ■ Staff

	Four Year Institution				Two Year Institution			
Staff	54	60	52	59	19	25	33	24
Faculty	24	26	29	25	5		6	15
	2015-16	2016-17	2017-18	2018-19	2015-16	2016-17	2017-18	2018-19

Student Overview

ENROLLMENT BY STUDENT CLASSIFICAION
AMERICAN INDIAN-ALASKA NATIVE

Conclusions

As a state, we have a very real and strong compelling interest to ensure American Indian students are afforded equitable options based on the following tenets:

- Have opportunities to achieve the highest possible standards, and the best possible qualifications for the next stages of their life and education.

- Alignment of policies, produces, and curricula that develops a sense of personal and cultural identity that is confident, receptive, and respectful towards all identities.

- Model knowledge, understandings, and skills to successfully participate in society as a contributing citizen.

We look forward to your continued support and collaboration on these efforts.

Alone we can do so little; together we can do SO much.

—Helen Keller
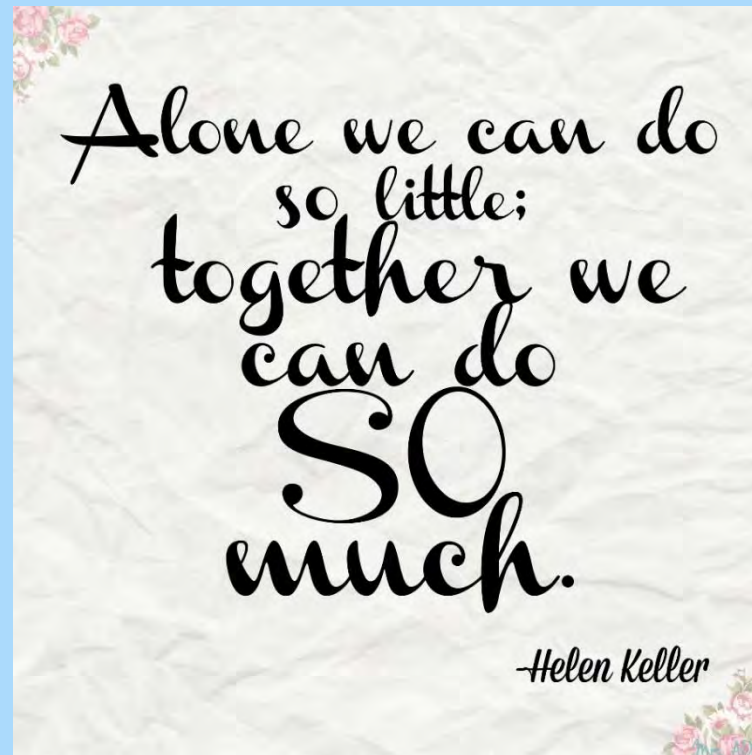
PRESIDENTS LEADERSHIP COUNCIL

SUBJECT
> Presidents Leadership Council Report

REFERENCE

January 2019	Board accept the Huron Report and for the Board President to appoint a subcommittee of Board members to identify a timeline and decision points for Board consideration and implementation plans based on Board adopted recommendations.
June 2019	Board received systemness update and progress on implementation of recommendations from the Huron Report from the Systemness Subcommittee formed January 2019.
August 2019	Board receives update from the Presidents Council on systemness and forms Systemness Program Committee.
February 2020	The Presidents Council provided an update to the Board on current activities of the Council and the Board approved first reading of amendments to Board By-laws, amending provisions of the Presidents Council and removing it as a workgroup of the Planning, Policy and Governmental Affairs Committee.
April 2020	Board approved second reading a proposed Board By-law amendments.

BACKGROUND/DISCUSSION
> The Presidents Leadership Council will give a report on its recent work and answer questions.
>
> The following topics will be covered

- Huron Recommendations
    - Spans of Control
    - Generalist Positions
    - Workforce Sharing
    - Purchasing
    - ERP Planning
- System Academic Collaboration
    - Board Policy III.Z
    - Cybersecurity Initiative
    - Dual Enrollment
    - Online Idaho
- Higher Education Funding Formula

- Presidents Leadership Council and State Board of Education communication and reporting

ATTACHMENTS
Attachment 1 – Presidents Leadership Council Progress Report

STAFF COMMENTS AND RECOMMENDATIONS
The last update the Board received from the Presidents Leadership Council was at the February 2020 Regular Board meeting. At that time they covered the following topics:
- August Presidents Council Retreat
- Presidents Council Initiatives:
  - Board Policy III.Z. amendments
  - Cybersecurity Joint Program
  - Dual Credit Program
  - Research Collaboration
  - Workforce Optimization (Huron Recommendations)
  - Advocacy
- Institution FY20 and FY21 Holdbacks

BOARD ACTION
This item is for informational purposes only.

Presidents Leadership Council

AUGUST 2020 REPORT

Presidents Leadership Council

Boise State University

Idaho State University

University of Idaho

Lewis-Clark State College

College of Eastern Idaho

College of Southern Idaho

College of Western Idaho

North Idaho College

Office of the State Board of Education

Table of Contents

Executive Summary

The Presidents Leadership Council (PLC) has undertaken a number of initiatives in response to the State Board of Education's call for increased collaboration, coordination, and cohesion (i.e. systemness) among the eight public higher education institutions in Idaho. Among these initiatives are those that were directly commissioned by the State Board of Education (Board) along with initiatives arising from the PLC itself in the spirit of addressing the Board's call for systemness in back office functions and academic collaboration. All initiatives are aimed to support the State Board of Education's strategic plan, enhance academic program offerings in the state, create efficiencies, and improve effectiveness of higher education in Idaho. In addition, certain initiatives are aimed to address barriers to systemwide success.

The following report provides an overview of all current PLC-led initiatives, including an overview of the initiative objectives, progress to date, and next steps currently planned by the PLC. It is the intent of the PLC to provide this information to the Board to ensure that activities undertaken and planned are in alignment with the Board's expectations for the institutions of higher education, while also providing an avenue for feedback from board members.

Please note, the Huron recommendation updates provided below only apply to the Colleges and Universities.

Huron Recommendations: Span of Control and Generalist Positions

Overview

Optimize mid-level manager footprint by improving average span of control within each 4-year institution. Leverage economies of scale for both specialized business support staff as well as administrative generalists to reduce the overall non-faculty labor footprint of each institution.

Progress

In Fall 2019, Idaho State University, University of Idaho, and Lewis-Clark State College initiated a comprehensive review of staffing levels and organizational structures as part of budget balancing efforts to address long-term structural deficits at each of these institutions. While Boise State University doesn't face the same long-term structural deficits, it too is engaged in the process of a holistic review of all positions. Through this process, the institutions have identified strategic position eliminations, implemented reorganizations to address span of control issues, and made adjustments to existing positions to maximize effectiveness and efficiency.

Given each institution's unique circumstances, the approach to these reviews and subsequent actions manifested differently at each institution. The following provides an overview for each institution.

Barriers
-   While the institutions have worked to make progress on the span of control and generalist position recommendations, which largely impact mid-level management and front line staff, the system also experienced significant political pressure to reduce administrative leadership positions. With finite human resources, this dual focus creates considerable constraints to maintain staffing levels needed to meet the mission of the institutions.
-   Given current administrative rules, regulations, and structures through the Division of Human Resources, there are significant barriers to make position adjustments to classified staff.
-   Further, as long as the higher education system remains within the Division of Human Resources jurisdiction for its classified staff, and has to justify each non-classified position to meet the DHR exemption requirements, the span-of-control and generalist position problem will continue to exist.

Next Steps:
-   The institutions are still in the process of identifying the full scope of the budget impacts of the pandemic and one institution is in the midpoint of its initial response to this Huron recommendation. Further changes to the workforce are possible given the realities of the state appropriation and tuition revenue. Therefore, the institutions will continue to evaluate their workforce needs with the span of control and generalists positions recommendations in mind.

University of Idaho

Upon assuming the role, President Green removed $14 million from the FY2020 budget, which was compounded by the State recisions and holdbacks. For FY2021 another $22 million was permanently eliminated prior to the State 2% base and 5% one-time holdbacks. In order to address one-time budget pressures, the University of Idaho instituted a voluntary furlough program in FY2020 and a mandatory furlough program in FY2021. The financial impact of these actions across all funds types total $0.4 million in FY2020 and $5.5 million in FY2021. The portion of the $0.4 million in FY2020 coming from appropriated funds, in combination with university reserves, was used to meet the FY2020 2% (1% + 1%) holdback. The portion of the $5.5 million in FY2021 coming from appropriated funds will be used, in combination with unallocated CEC funding, to meet the FY2021 5% holdback of approximately $5 million. In addition, the uUniversity realized approximately $19.9 million in one-time salary savings in FY2020, again across all fund types. It should be noted that these salary savings are equal to budget less actuals. For revenue generating fund types, these salary savings may have been offset by unrealized budgeted revenue, thereby not resulting in actual cash savings to meet other needs.

In terms of base reductions, the university's personnel (salary plus benefits) budget decreased from FY2020 to FY2021 by $7.7 million and 73.68 FTE, with 117 or 45% of departments having FTE decreases, 68 or 27% having FTE increases and 73 or 28% having no change in FTE. The base changes reflect the impact of voluntary separation, voluntary early retirement, position eliminations, non-renewals and other permanent changes, with departmental FTE totals also impacted by reorganizations and consolidations.

FY 2019 - 2022 Eliminations and Reductions					
	FTE	**Total**		**FY 2020**	**FY 2021**
Faculty FTE	56.17	$ 5,003,706	Salary Savings	$ 19,895,932	N/A
Non-Classified/Professional Staff	29.31*	+ $ 1,548,560	Voluntary Furlough	$ 406,611	N/A
Classified Staff	74.2	$ 3,122,231	Mandatory Furlough	N/A	$ 5,477,211
Total	**73.68**	**$ 7,671,092**	**Total**	**$ 20,302,543**	**$ 5,477,211**

Departments with FTE increase: 68

FY 2019 - 2022 Positions Eliminated		
Classified	**Faculty**	**Non-Classified**
Administrative Assistant	Clinical Faculty	Academic Advisor
Administrative Coordinator	Instructor	Academic Consultant
Administrative Financial Specialist	Instructor Faculty	Assistant Men's Basketball Coach
Agricultural Technician	Regular Faculty	Assistant to the Dean

Assistant to the Director	Research Professor	Associate Controller
Compliance Coordinator		Business Manager
Coordinator of Competitive and Recreational Sports		Capital Asset Accountant
Course Material Liaison/Co-Buyer		Co-Director
Depot Technician		Computation Resources Core Director
Education Abroad Specialist		Continuing Medical Education Coordinator
Events and Communications Specialist		Director
Financial and Administrative Assistant		Director of Strategic Initiatives
Financial Specialist		Director, American Language and Culture Program
Recycling Technician		Director, College Assistance Migrant Program
Research Aide		Education Resource Manager
Research Specialist		Energy Manager
Scientific Aide		Enterprise Systems Analyst 2
Team Cleaning Specialist		Executive Director
		Head of Portfolio/Project Management
		IT Research Supervisor
		ITS Project Manager
		Junior Technology and Licensing Associate
		Marketing and Communications Manager
		Postdoctoral Fellow
		Program Coordinator
		Program Director
		Project Manager
		Ranch Manager
		Research and Development Engineer 1
		Research and Development Engineer 2
		Research Scientist
		VandalSphere Support Manager

Lewis-Clark State College

Upon assuming the role, President Pemberton was faced with a $1 million budgetary deficit across fund types, which was compounded by a State 2% base reduction, 5% holdback, and enrollment workload adjustment amongst other challenges. Lewis-Clark State College's General Education program anticipates a $2.6M budget deficit in total and a yet to be determined enrollment impact from COVID-19 with estimates upwards of $3.1M. To address FY2021 financial challenges, Lewis-Clark reduced budgeted expenditures in the general education program by $1.7M. One-time legislative authorized stabilization funds, unallocated CEC and target position funding, mandatory furloughs, and a hiring freeze will further assist in meeting the 5% holdback and uncertain enrollment. In terms of personnel impacts, Lewis-Clark's FTE decreased by 6.1% from FY 2020 to FY 2021 and 6% across all fund types. Further personnel reductions will occur in FY 2022 for a total reduction of -9.3% across all funds and -7.3% in general education from FY 2019 – FY 2021. Lewis-Clark further reduced budgeted expenditures in the Career and Technical Education (CTE) program by $98,300 for a 2% base reduction. This resulted in the reduction of personnel and operating expenditures. Unallocated CEC, mandatory furloughs, and a hiring freeze will further assist in meeting the 5% CTE holdback.

The following provides an overview of position reductions, reorganizations and adjustments that addressed Lewis-Clark's budget shortfall, while also addressing Huron's span of control and generalist position recommendations.

FY 2019 - 2022 Eliminations, Reductions, and Vacancies		
	FTE	**Total**
Position Elimination and Reduction Savings	**53.24***	**$ 3,396,963**
Faculty FTE	15.15	
Non-Classified/Professional Staff	16.3	
Classified Staff	21.79	
Position Vacancies	**27.5****	**$ 2,034,913**
Grand Total		**$ 5,431,876**

Total Positions: 68
**Total Positions: 29*

Span of Control Snapshot		
2019 - 2020	**2020 - 2021**	**2021 - 2022**
8 Departments 11 Direct Reports	23 Departments 20.62 Direct Reports	4 Departments 10 Direct Reports
International Programs (-2.8)	Student Account Services (-1)	Movement & Sports Sciences (-1)

Student Counseling and Health Services (-1.25)	Registrar and Records (-1)	Natural Science & Mathematics (-3)
Admissions (-1)	Controller's Office (-1)	Early College Programs (-.25)
LC Service Corps (-2)	Advancement (-1.5 and +1.5 per reorg)	Professional and Graduate Studies (-.16)
Athletics (-1)	Center for Arts and History (-3)	Business (-3.6)
Library (-1)	CTE Office	Nursing & Health Sciences (-1.5)
Teacher Education (-2)	Technical & Industrial Division (-1)	Teacher Education (-2.5)
TRIO (-1)	Academic Affairs (-1)	Library (-1)
Information Technology (+2)	Coeur d'Alene Center (-1)	Business Technology & Services (-4)
Advising Center (-1)	Accessibility Services (-1.15)	
Student Employment, Career Center and Work Scholars (-.25)	Liberal Arts & Sciences (-.24)	
First Year Experience/Student Union (-1)	Humanities Division (-1.92)	

Span of Control - Number of Supervisors			
July 1, 2018	**July 1, 2019**	**July 1, 2020**	**July 1, 2021**
81	73	72	TBD

Titles of Positions Eliminated by Unit			
Academic Affairs	**Student Affairs**	**Administrative Services**	**Direct Reporting Units**
Administrative Assistant 1	College Health Nurse Practitioner	Administrative Assistant 1	IT Director
Apprenticeship Coordinator	Account Collection Specialist		Custodian
Assistant Professor	Administrative Assistant 1		Maintenance Craftsman Sr.
Associate Professor	Associate Director		Administrative Assistant 2
Director, Lewis-Clark Service Corps	Counselor		Telecommunications Technician
Financial Technician	Custodian Leadworker		
Instructional Assistant	Director, SUB, Center for Student Leadership		
Instructor	Instructor, IIE		
Instructor of Chemistry	International Recruitment & Retention Specialist		
Instructor, Biology	Intramural Coordinator		
Library Assistant 2	IPO Director		
Professor of English	Nurse, Student Health Services		
Professor, Business Management	Resident Director		
Professor, Engineering	Technical Records Specialist 2		
Student Success Navigator	Transcript Evaluator, Senior		
Technologist			

Titles of Reduced Positions by Unit			
Associate Professor	Counselor	N/A	N/A
Assistant Professor Nursing	Assistant Director		
Associate Professor Nursing			
Assistant Professor Nursing			
Program Assistant			
Coordinator, Early College Programs			
Program Advisor			
Director – Library			
Division Chair - Business			
Sim Lab Technician			
Director, Early College Programs			
Division Chair – DONSAM			
Division Chair - Social Sciences			
Administrative Assistant 1			
Technical Records Specialist 2			
Vacant Positions by Unit			
Administrative Assistant 2	Coordinator, Events & Conferences		Vice President for Finance & Administration
Assistant Professor			Development Coordinator
Associate Professor			Director, Alumni & Community Relations
Associate Professor/Division Chair			Athletic Operations
Coordinator			IT Web Developer
Instructor			Coordinator, Theater & IVC/Media Spec
Library Assistant 2			IT Operations & Support Technician
Professor			
Program Advisor			
Technical Records Specialist 1			

Idaho State University

Idaho State University began FY20 with a $6 million structural deficit, driven by multi-year enrollment declines. During the course of FY2020, the University's deficit worsened through a combination of additional enrollment declines, a 2% rescission of state funding, and the unprecedented COVID-19 pandemic. Idaho State's structural deficit going into FY2021 is $11.7 million, as illustrated below. In addition to the structural deficit, the University faced an additional $5M rescission from the State of Idaho and yet to be determined enrollment and event revenue impact from COVID-19. As a result of this situation and to address the Huron recommendations, Idaho State University underwent a systematic review of all departments, units and positions to identify positions for reduction, elimination, or adjustment.

Budget Overview	
FY 2020 Structural Deficit	$ 6.7 M
Revenue Shortfall	$ 3 M
State Rescission	$ 2 M
Structural Deficit	$ 11.7 M
Additional State Rescission	$ 5 M
FY 2021 Budget Deficit	**~ $ 16.7 M**

The following provides an overview of position reductions, reorganizations and adjustments that addressed the Idaho State University's budget shortfall, while also addressing Huron's span of control and generalist position recommendations.

FY 2019 - 2022 Eliminations, Reductions, and Vacancy Snapshot		
	FY 21 Savings	**FY 22 Savings**

Elimination of Vacant Positions
    26 Non-Classified
    19 Faculty
    16 Classified
	$ 3,832,500	$ 714,834

Elimination of Filled Positions
    17 Non-Classified
    8 Faculty
    8 Classified
	$ 1,723,929	$ 492,567

Decrease in Part-Time Employees (including adjunct faculty)	$ 852,613	$ 54,537
Salary Savings through Vacant Positions and Employee Turnover	$ 2,750,000	---

Total Position Eliminations	
Vacant Positions	$ 4,547,334
Filled Positions	$ 2,216,496
Irregular/Temporary Expenditures	$ 907,150
Total Permanent Position Budget Savings	**$ 7,670,980**

One-Time Budget Savings: FY 2021	
Salary Savings	$ 2,750,000
Employee Furlough Program	$ 2,000,000
Hiring Freeze Vacancies April-July 2020	$ 2,480,000
Total One-Time Position Budget Savings	**$ 7,230,000**

Span of Control Reductions			
Original Supervisor Count	328	Supervisors after FY 2021-2022 Reductions	299

FY 2019 - 2022 Positions Eliminated		
Classified	**Faculty**	**Non-Classified**
Administrative Assistant (9)*	Assistant Lecturer (2)	Accountant (3)
Cashier*	Associate Lecturer (2)	Assistant Controller (2)
Custodian (2)	Assistant Professor (15)	Assistant Director (2)
Dental Assistant	Associate Dean	Assistant Vice President (3)
Engineering Technician	Associate Professor (2)	Budget Analyst
Financial Technician*	Professor (4)	Compliance Manager
IT Records Specialist*	Tutoring Director	Dean (2)
Laboratory Technician		Dental Hygienist
Landscape Technician		Director (13)
Library Assistant		Human Resources Consultant
Maintenance Craftsman		Lab Coordinator
Motor Pool Mechanic		Maintenance Manager
Purchasing Records Specialist*		Project Manager (3)*
Maintenance and Operations Supervisor		Public Relations Specialist*
Research Analyst		Quality Coordinator*
		Records Manager*
		Security Engineer
		Systems Administrator
		Systems Analyst
		Systems Manager*
		Web Manager
		Departmental Accompanist*

Considered generalist positions and have been eliminated from the budget with functions reassigned to specialist positions.

Boise State University

Boise State University is midway through the process of a comprehensive workforce review in which every position description, unit/departmental structure, and supervisory role and responsibilities are assessed. Through this process, span of control issues are being identified and addressed.

As part of this process, earlier this spring the university eliminated annual contracts for professional staff, which constitutes 40 percent of our workforce. This change gives the university significant flexibility to restructure reporting lines to address the span of control concerns as well as any other structural or operational issues that are identified in the review process. The university is simultaneously implementing a strategy for professional development.

The review process will conclude this fall and additional span of control reductions are anticipated.

In addition to supervisory reductions, in FY20, the university eliminated 145 positions and froze 210 positions generating $28.7 million in savings, $12 million of which is permanent. These savings will be used to offset the FY20-21 reductions to base and one-time holdbacks.

FY 2020 - 2021 Budget Position Elimination and Vacancy Snapshots		
	Savings	**Total Positions**
Total Position Elimination Savings *(excludes positions funded from grants)*	$12,218,488	145
Total Projected Annualized Position Vacancy Savings (as of FYE20)	$16,487,128	210
Grand Total	**$28,705,616**	**355**

Total Positions Eliminated by Position Classification		
Classification	**FTE**	**Total with Benefits**
Classified	51.5	$3,067,256
Faculty	21.3	$2,284,306
Professional	72	$6,866,926
Total	**144.8**	**$12,218,488**

Total Positions Eliminated by Fund Type		
Fund	**FTE**	**Total with Benefits**
Appropriated	84.6	$7,761,024
Local	38.4	$2,861,608
Auxiliary	21.8	$1,595,856
Total	**144.8**	**$12,218,488**

Span of Control		
FY20	**FY21**	**Change**
Number of Supervisors = 859	Number of Supervisors = 815	- 44

Total of Positions Eliminated by Area		
Organizational Area	**FTE**	**Total with Benefits**
Academic Affairs	80.6	$6,621,468
Athletics	16	$1,136,378
Campus Operations	14	$1,059,749
Finance & Administration	16.2	$1,440,726
President Direct Reporting Unit	6	$681,399
Research & Economic Development	4	$586,765
Student Affairs	5	$352,192
University Advancement	3	$339,810
Grand Total	**144.8**	**$12,218,488**

FY 2020 - 2021 Titles by Position Eliminated
Academic Affairs

Academic Advisor
Academic Advising Coordinator
Accountant (2)
Administrative Assistant 1 (3)
Administrative Asst 1 LSA
Administrative Assistant 2 (3)
Administrative Asst 2 LSA
Associate Business Consultant
Associate Director MTI-PD
Associate Director, Statewide CSI/PS Program
Associate Dean Academic Affairs/Prof
Associate Program Developer
Assistant Site Coordinator CDA
Assistant Site Coordinator Lewiston
Assistant to the Dean (2)
Assistant Professor
Assistant Research Professor
Business Manager
Business Operations Manager (2)
Clinical Assistant Professor
Coord Major Exploration/Trans
Customer Service Rep 1
Director Med Svcs/Chief Med Officer
Dir External Affairs/Dev
Deputy Director
Faculty (10)

Intl Student Svcs Coord
Interim Director COHS Research
Lab Materials Supervisor (2)
Lecturer (2)
Library Assistant 2
Library Assistant 3
Library Section Manager (2)
Management Assistant (7)
Manager Online Faculty/Tech Prog
Mechanical Instrmt Engineer
MGR Student Outreach Services
NSF Step Program Coordinator
Physics Laboratory Instructor
Prof/Dir Intl Bus/Dept Chair
Professor
Professor/Associate Chair
Program Director
Recruit/Admissions Advisor Coord
Regional Math Specialist (2)
Research Analyst
Research Associate
Research Scientist
Site Coord Lewiston
Senior Research Scientist
Staff Interpreter
Sr IEP Inst/Cont Prog Liaison

Facilities Manager Financial Technician General Assignment Reporter Graphic Design Specialist (2) IEP Instructor	Systems Administrator Technical Records Specialist 1 Technical Records Specialist 2 (3) Transfer Advising Coordinator

Athletics	**Campus Operations**
Academic Advising Coordinator Assistant Coach Wrestling Assistant Director (2) Assistant Site Coord Lewiston Assistant Ticket Manager Associate AD Administration Assistant Director FB & Recruiting Ops Athletic Facilities Sch Coordinator Box Office Manager Building Facilities Foreman Business Manager Business Operations Manager Co-head Coach Gymnastics Director Director Business Operations Facilities Maint Supervisor Football Operations Coordinator Landscape Foreman	Administrative Assistant 2 Assistant Manager Textbooks Building Facility Maint Foreman Building Superintendent Business Services Supervisor Commercial Appl Repair Tech Coordinator Director Energy Engineer Facilities Project Manager GIS Manager HVAC Specialist Maintenance Craftsman OCC Health/Hazmat Officer Planner Project Coordinator

Finance and Administration	
Communications Coordinator Director of Operations Director of Purchasing Directory Sys & Proc Improvement Enterprise Business Analyst 3 (2) Executive Assistant Human Resources Associate Management Systems Coordinator	Personnel Technician LSA Programmer Analyst 3 Senior Buyer (2) Software Applic Admin 2 Sr Financial Technician Tech Support Spec 2 Technical Records Spec 1 LSA Web Developer 1

President Direct Reporting Units	**Research and Economic Development**
Administrative Assistant 2 (3) Assistant Director Audit Manager Chief of Staff Intake & Outreach Advisor Printing/Graphics Manager	Assc Dir Research Compliance Assc VP Research/Economic Dev Director Economic Development Research Associate

Student Affairs	**University Advancement**
Financial Aid Counselor Management Assistant Program Information Coord Technical Records Specialist 2 (2) Veterans Services Coordinator	Assc VP University Advancement Assistant Director Development Director Development/Athletics

Huron Recommendation: Workforce Sharing

Overview: Reduce staffing costs and increase efficiencies through the sharing of resources in certain functional areas with limited scale.

Progress: Since August 2019, the PLC has regularly discussed functions that could be shared, coordinated, and/or centralized. Currently, the institutions are exploring workforce sharing for Internal Audit, Risk Management, and Purchasing.

As outlined in the Huron report (Attachment 1), they recommend that certain functions can be managed effectively through delivery model 1: Building out OSBOE, while others would function most effectively through delivery model 4: Leveraging one institution as the service provider for all. Delivery models 2 and 3 were not considered given lack of feasibility. The following provides an overview of rationale for centralization as well as recommended delivery model for each function.

Internal Audit: Internal Audit has been identified by both the institutions as well as the Audit Committee of the Board for an opportunity for centralization. Due to the standard processes, skill sets, and similarities in campus needs, this function could be ideally centralized to realize efficiencies and potentially financial savings. The institutions are working to compile all individual audit plans and integrate those into a single system audit plan for the Colleges and Universities. Following this, an assessment will be conducted to determine needed staffing levels, reporting structure, and budget allocation.

Delivery Mechanism: The PLC recommends service delivery model 4: leverage institution as service provider. In this case, Boise State is best suited to provide this service for the system. Boise State has a robust internal audit operation and also has the expertise needed to handle a multi-campus audit operation. Using this, the largest of the internal audit operations in the system, as the lead and the base, along with local auditors in Southeast Idaho and North Idaho, the system can cover its internal audit function via a single statewide, uniform audit plan with consistent methodologies and consistent reporting among the institutions.

System Benefit: A staffing analysis has yet to be conducted, however, it is anticipated that the system could realize savings of approximately 2 to 3 FTE or approximately $75,000-$150,000 annually. Standard processes and procedures across the system will also provide streamlined services to campuses and common reporting to the Board.

Risk Management: All institutions have very similar risk management functions given the State's Department of Administration oversight of risk. As a result of the uniformity and straightforward transactional services, the PLC feels strongly that this function has potential for centralization.

Delivery Mechanism: The PLC recommends Model 1: Build out OSBE functions. All four institutions operate on the State of Idaho's retained risk program. So, essentially, the College and Universities are ultimately insured by the State of Idaho centrally at present. The campus risk management operations could be consolidated into one office in OSBE designed to provide all College and University employees with uniform service for risk management.

System Benefit: A staffing analysis has yet to be conducted; however, it is anticipated that the system could realize savings of $50,000-$85,000. In addition, Lewis-Clark State College and Idaho State University would likely benefit from a more professionalized and consultative risk management program as current budget constraints have limited this potential in the past.

Purchasing: The PLC is currently exploring centralizing purchasing functions. This function would be ideal as a shared service provider, as it would allow the level of communication and coordination needed to effectively address Huron's shared purchasing power recommendation.

Delivery Mechanism: The PLC is currently exploring service delivery model 4: leverage institution as service provider. Specifically the PLC is exploring centralizing this function at the University of Idaho. The University of Idaho operates in a more flexible purchasing statutory framework than the other institutions, which might allow that flexibility to benefit the entire system.

System Benefit: This restructure would provide the organizational structure needed to leverage collective buying power. A staffing analysis has yet to be conducted; however, it is anticipated that the system could realize savings of $75,000-$250,000. In addition, pooling purchasing power and economy of scale buying has significant potential for systemwide savings.

Next Steps:
- Internal Audit: The Institutions will seek Audit Committee approval to restructure Internal Audit as a shared delivery function with reporting authority at Boise State University. It is recommended that reporting authority be reviewed jointly by the PLC and Audit Committee biannually.
- Risk Management: The institutions recommend that the Risk Management function of each institution be relocated to the Office of the State Board of Education reporting to the Chief Financial Officer. Following a staffing analysis, savings yielded from the centralization will be allocated back to the institutions by a methodology to be determined.
- Purchasing: The PLC will develop an implementation timeline and plan to be informally reviewed and approved by the Executive Officers of the State Board of Education by December 2020.

Huron Recommendation: Purchasing

Overview: Target savings from improved purchasing power through activities such as shared contract negotiation, resulting in discounts and rebates. Included is reducing manual processes and mitigating off-contract or rogue spending.

Progress: The PLC is currently working on a proposal to consolidate/centralize purchasing functions as outlined above. This effort will provide the organizational structure to facilitate coordination and communication to leverage collective buying power.

Barries:
- Currently the State of Idaho is pursuing the LUMA project implementation designed to provide an enterprise resource planning system for all state agencies to realize statewide unification in budget planning, financial management, procurement, payroll, and human capital management. It is unclear at this point to what extent higher education and campus purchasing departments will be impacted by this, which may create a barrier to the consolidation concept presented.

Next Steps:
- The PLC will develop an implementation timeline for consolidating purchasing to be informally reviewed and approved by the Executive Officers of the State Board of Education by December 2020.
- The PLC will commission a planning process to begin to set up the standard operating procedures among the institutions to start to integrate operations, with the goal of leveraging joint purchasing power as soon as possible.

Huron Recommendation: ERP Planning

Overview: Establish the infrastructure, inventory business needs, inform requirements, and prepare the State Board to create a solicitation (RFP) for both a cloud-based ERP for finance, HR, and student systems, as well as an implementation partner.

Progress: Currently, Idaho's institutions of Higher Education institutions are engaged in contracts for ERP services for finance, human resources and student databases. Huron explicitly stated that while a common ERP solution is potentially a worthwhile venture, it is a long-term project. Specifically, Huron recommended that "the four institutions (. . .) ERPs will require an upgrade to a cloud-based platform in the next 5-10 years." This is due in part to current contract engagements, but is primarily due to the long-term planning nature of transitioning ERP systems for the institutions. As Huron pointed out, "While consideration of the full spectrum of IT activity along the roadmap is critical, the steps involved in ERP implementation alone are substantial," and "coordinated transition to a single ERP environment (. . .) is more complex than independently managed upgrades." Finally, the one-time implementation and transition costs are expected to be substantial and will require a financial plan that is not considered feasible at this time.

However, in coordination with the Office of the State Board of Education, the institutions have inventoried all systems currently in place. Given the recommendation, the institutions and OSBE can work together to identify a target year where transition to a common ERP transition would be possible and in a timeline that allows for the development of a financial plan to account for the transition expenses. In preparation for that, the institutions are not entering into contracts that are outside of that potential time horizon.

Institution	Category	Service	Cost	Contract Terms
ISU	Finance	Ellucian Banner	$ 45,239	2022
	Human Resources	Ellucian Banner	$ 49,833	2022
	Student	Ellucian Banner	$ 135,061	2022
	Direct Supporting Products	Various	$ 450,872	2022
LCSC	Finance	Ellucian Colleague	$ 267,182	Annual
	Human Resources	IPOPs, I-Time	$ 209,070	Annual
	Student	N/A	N/A	N/A
	Direct Supporting Products	EMC, SQL Server	$ 98,511	Annual
U of I	Finance	Ellucian Banner	$ 421,858	2021
	Human Resources	Ellucian Banner	$ 2,006	2021
	Student	Ellucian Banner	$ 11,432	2021
	Direct Supporting Products	Oracle DBMS & App Server	$ 243,086	2021
BSU	Finance	Oracle ERP Cloud	$ 375,000	2020
	Human Resources	Oracle HCM Cloud	$ 450,000	2022
	Student	PeopleSoft Campus Solutions	$ 390,000	Annual
	Direct Supporting Products	Oracle Databases and Analytics	$ 387,000	Annual

Next Steps:
- The institutions are developing a working project timeline for a common ERP solution.
- In the interim, as institutions bid on products before that date, coordination will occur to realize joint purchasing power when possible.

System Academic Collaboration: Online Idaho

Overview: To address education access and meet the educational needs of the State of Idaho, Idaho's higher education institutions have developed a baseline inventory of degree/certificate programs and GEM courses available to be completed online across the eight Idaho public institutions. The purpose is to reveal and leverage the range and scope of online education opportunities currently available in Idaho. Packaging and marketing the existing composite of online Idaho education offerings facilitates seamless access across the state and institutions, with accreditation, academic quality and administrative infrastructures that are already in place.

Progress: A comprehensive inventory of online degrees, certificates and GEM courses has been developed. This will allow the system to identify pathways for students regardless of the institution providing the instruction. The inventory clearly reveals that Online Idaho not only exists, but includes a robust menu of courses and programs across degree levels.

Next Steps: Data verification is in progress. Following this, the Office of the State Board of Education will begin efforts to build an access portal.

System Academic Collaboration: Cybersecurity Joint Program

Overview: Develop statewide cybersecurity joint programming that efficiently and effectively utilizes the resources and expertise of all eight institutions to deliver top-quality cybersecurity education in the state of Idaho. Design and build jointly delivered statewide cyber education degree(s) and curricular pathways where credits earned at each institution are part of the common program(s)/pathways. Pursue a "stackable" statewide cybersecurity pathway from the associate/certificate level through the doctoral level. Allow students to access the cybersecurity pathway and pursue cybersecurity degrees using any of the institutions as the entry point. The pathway will utilize resources and at all the institutions.

Progress: The PLC identified an ecosystem with the potential partners and key stakeholders who will help the institutions be a success in the process including the state board. Presidents Satterlee, Tromp and Green met with Mark Peters at INL to discuss CAES and how to move our research partnerships around cybersecurity forward. Leadership and faculty from all of our institutions are committed to serving INL and other employers workforce needs.

CAAP prepared a preliminary inventory report on what the institutions are offering now, what is already in the pipeline, and what they plan for the future. We also started a needs assessment on what will be required for facilities and funding successful execution.

PLC partnered with OSBE to write a funding briefing and were successful in receiving 1 million dollars in funding to help start developing the curriculum, building the infrastructure, and connectivity necessary for the overall cybersecurity ecosystem. While the funding may come to some specific institutions, it is the intent of PLC to use the funds in a way to benefit all of us.

Next Steps: PLC to work with BAHR on expenditure of the $950,000 ($1 million less 5% holdback). Identify a project manager to help coordinate initiative to continue momentum.

System Academic Collaboration: Dual Enrollment Program

Overview: Review the state's dual enrollment program with the following objectives:
1. Leverage Idaho's dual-enrollment program and Idaho's Advanced Opportunity funding to realize more students going on to in-state higher education. Essentially, develop strategies that can develop dual-enrollment as a recruiting tool for Idaho's higher education system.
2. Leverage Idaho's dual-enrollment program and Idaho's Advanced Opportunity funding to increase the speed of progress toward a degree for students that go on to higher education.
3. Develop a proposal for PLC to approve initiatives that can be launched or alterations to current dual enrollment policies, practices or processes that meet those objectives.

Progress: A work group was formed in March 2020 that is currently conducting a modified SWOT analysis of Idaho's advanced Opportunities.

Next Steps: The work group will present recommendations to the Presidents Leadership Council by October 2020 outlining programmatic improvements to Idaho's dual enrollment program.

System Academic Collaboration: Board Policy III.Z Revision

Overview: Develop a policy revision proposal for board policy III.Z that incentivizes cooperation, coordination, and synergies between the institutions. Revise policy language that creates an environment of competition and silos. Maintain a focus on avoiding duplication and encouraging excellence in certain areas.

Progress: A small working group comprised of TJ Bliss, Laura Woodworth-Ney, and Board member Linda Clark have been meeting to begin the policy revision process.

Next Steps: The policy draft will be finalized in CAAP August 2020. The PLC and IRSA will then review the policy draft in September 2020. A first reading of the policy is slated for December 2020.

Funding Formula

Overview: Develop a holistic higher education funding formula that provides a sustainable and predictable funding for core university functions including instruction, student support, facilities needs, while incentivizing collaboration amongst the institutions. The funding formula should include all elements of higher education funding, including base funding, CEC, occupancy costs, and line items.

Progress: A work group established by the Governor's office, composed of the PLC, elected and appointed officials, and an industry representative, started meeting in February 2020 but did not meet for several months during the stay-home order. The group recently began meeting again. In addition, the PLC has met several times to advance this initiative. Presently, there are two conceptual models which were developed by the PLC. The first model is an augmented Outcomes-Based Funding Model and the second is tied to a percentage of overall state appropriations, with outcomes-based elements as well. The Office of the State Board of Education is currently conducting the analysis to refine the models.

Next Steps: Two models are being refined and vetted through the funding formula workgroup.

Conclusion

In only one year, the Presidents Leadership Council has achieved significant progress on the abovementioned initiatives and we request the State Board of Education to provide feedback, direction, or clarification surrounding expected outcomes of these initiatives. Unless directed otherwise by the Board, the PLC will continue to move these initiatives forward as outlined and will provide regular updates at Board meetings.

Attachment 1

FOUNDATIONAL DECISIONS
GOVERNANCE BODIES / DELIVERY MECHANISMS

Partnership efforts will require new, or reconfigurations of existing governance structures. The below framework outlines possible delivery mechanisms.

Governance Bodies / Delivery Mechanisms

1 Build Out ISBOE

Build-out and staff the Office of the ISBOE to either manage policies, initiatives, and / or a dedicated workforce providing services.

2 Establish a System Office

Establish a new system office that will specifically govern the four four-year institutions

3 Jointly Govern a 501(c)3

Set up a jointly governed 501(c)3 that will govern / manage collaboration

4 Leverage institution as a Service Provider

Create mechanism for one institution to serve as service provider for select partnerships on behalf of the "system"

Key Considerations
- Ability to secure legislative approval
- Cultural and political buy-in
- Long-term scalability

BAHR - SECTION II   TAB 7 Page 15

15   HURON

IDAHO STEM ACTION CENTER

SUBJECT
Request for Approval of Updated STEM Designation Standards.

REFERENCE

April 2018	Board approved STEM School Designation standards and process for designating public schools and programs.
December 2018	Board received an update from the STEM Action Center on the process for identifying schools for STEM School Designation and a general update on the activities of the STEM Action Center.
January 2019	Board designated the first four Idaho STEM Schools: Barbara Morgan STEM Academy, Galileo STEM Academy, Temple View Elementary, and Bingham Academy.
February 2020	Board approved North Idaho STEM Charter Academy in Rathdrum and Southside Elementary in Lake Pend Oreille School District #84 as Designated STEM Schools.

APPLICABLE STATUTE, RULE, OR POLICY
Section 33-4701, Idaho Code

BACKGROUND/DISCUSSION
Section 33-4701, Idaho Code, was enacted by the legislature in 2017, establishing a STEM school designation to be earned by schools and programs that meet specific standards established by the State Board of Education (Board). Pursuant to Section 33-4701, Idaho Code, the Board is charged with awarding STEM school and STEM program designations annually to those public schools and programs that meet the standards established by the Board in collaboration with the STEM Action Center.

At the April 2018 Regular Board meeting, the Board approved STEM School Designation Standards. The Board has subsequently awarded STEM Designation to six schools, four in January of 2019 and two in February of 2020. In 2020, these standards were updated and re-classified, transitioning from eleven standards under the previous framework to sixteen in the updated framework. It should be noted that all eleven of the previous standards are embedded in the updated standards, but the standards have been subdivided and reorganized to allow for more accurate analysis regarding each school's progress relative to the standards. All eight elements in Section 33-4701, Subsection (3) (b), are contained in the updated standards and/or in the supporting concepts of the STEM Standards Crosswalk.

The STEM Action Center Board is recommending the State Board of Education approve the updated STEM Standards for schools seeking STEM school Designation from this day forward.

IMPACT

Once approved, public schools will be evaluated based on the amended standards for earning STEM School Designation.

ATTACHMENTS

Attachment 1 – Updated STEM Standards
Attachment 2 – STEM Standards Crosswalk, original compared to updated

STAFF COMMENTS AND RECOMMENDATIONS

Pursuant to Section 33-4701, Idaho Code:

- The Board shall award STEM school and school programs that meet the standards established by the Board in collaboration with the STEM Action Center.
- The STEM Action Center Board shall make recommendations annually to the State Board of Education for the award of a STEM school designation.
- STEM designations shall be valid for a term of five (5) years. At the end of each designation term, a school may apply to renew its STEM designation.

Approximately 25 individuals from traditional and charter schools, as well as industry volunteered to participate in developing the original STEM school designation standards for the Board's consideration in 2018. The group researched standards developed in other states as well as AdvancEd's STEM Certification Standards. AdvancED's STEM Certification Standards consist of 11 standards broken into three categories: STEM Learners, STEM Educators, and STEM Experiences. Based on this research, the work group has proposed the standards identified align with AdvancED's STEM Certification 11 Standards. AdvancED has updated and reorganized their standards into 16 standards. The proposed amendments to the Board's STEM School Designation Standards align with AdvancED's new standards. Alignment with AdvancED's STEM Certification Standards makes it possible for schools seeking STEM school Certification from AdvancED to use the same evaluation for the Idaho STEM School Designation. Staff recommends approval.

BOARD ACTION

I move to approve the request by the Idaho STEM Action Center Board to amend the STEM School Designation standards as provided in Attachment 1, effective in 2021.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

Update STEM K-12 STEM Designation Standards

<u>STEM Community</u>
Standard 1 - School/program provides equitable opportunities for students to engage in high quality STEM learning.
Standard 2 - STEM educators collaborate to develop, implement, and improve high quality STEM learning activities.
Standard 3 - School/program engages diverse STEM community in order to support and sustain STEM programs and initiatives.
Standard 4 - School/program has established a shared vision for STEM and has leadership structures to support effective implementation.

<u>STEM Learning Culture</u>
Standard 5 - Leaders ensure that all stakeholders have ongoing opportunities to access information and learn about STEM implementation.
Standard 6 - Educators and leaders participate in an ongoing system of STEM-specific professional learning.
Standard 7 - Students engage collaboratively in authentic inquiry during ongoing units of study.
Standard 8 - Students engage in self-directed STEM learning guided by educators who are effective facilitators of learning.

<u>STEM Experiences</u>
Standard 9 - School/program provides within-school and extra-curricular opportunities for students to extend STEM learning.
Standard 10 - Students demonstrate their learning through performance-based assessments and have opportunities to develop self-assessment and self-monitoring skills.
Standard 11 - STEM learning experiences integrate all STEM disciplines with an emphasis on processes and practices associated with STEM.
Standard 12 - School/program provides high quality STEM courses and curriculum aligned to recognized standards and organized into interdisciplinary frameworks.

<u>STEM Outcomes</u>
Standard 13 - Students demonstrate STEM content knowledge representative of STEM literacy outcomes that prepare them for the next level of learning and work.
Standard 14 - Students develop STEM skills and cross-cutting competencies that support workforce readiness.
Standard 15 - School/program engages in a continuous improvement process for STEM.
Standard 16 - School/program conducts evaluative activities to ensure the effectiveness of STEM implementation.

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Cognia STEM Standard Crosswalk – by Standard Concepts

How to interpret this document
At first glance, it might appear that the new STEM Standard framework contains more content than the original set of STEM Indicators. This is a reasonable assumption given that there are now 16 STEM Standards in place of 11 STEM Indicators. However, it is important to look at a standard crosswalk at the level of the *concepts* contained within the Standards and Indicators. Our original Indicators contain a total of 31 concepts. The concepts are not evenly distributed across these 11 Indicators; some have two concepts, while Indicator ST 1.6 contains the most content with five concepts. Each Standard within the new STEM framework contains two concepts, for a total of 32 across the 16 standards. From this perspective, we have only added one additional concept (in number) to our STEM framework. However, the shifts within the concepts reflect a great deal of work, research, and consideration from our team. The Appendix to this document provides more detailed information regarding the changes, including the rationale for the content revisions, as well as the content from the initial STEM Indicators that does not appear in the new Standards. The main section of the document, the crosswalk itself, is devoted to a comparison between the new Standards and previous Indicators, from the perspective of the new standard framework. This makes it possible to see how content has shifted or moved within the framework, how we have revised some concepts, and which content is completely new in the Standards.

When reviewing the crosswalk, please keep in mind that the previous framework of 11 Indicators was based on four Performance Levels for each concept. Cognia will be using a new evaluation model for STEM Certification (see the i3 Rubric), so there will not be a Performance Level map for each Standard. In order to make the crosswalk document more considerate to the reader, original Indicator concepts (column 3) reflect Performance Level 3 language from the original concept maps, as this was the level of expected practice.

STEM Standard Crosswalk

Revised Standard - **Standard 1** - School/program provides equitable opportunities for students to engage in high quality STEM learning		Alignment to Prior STEM Indicator/Concept
Concept 1 - School/program has adopted an inclusive model of STEM education that is representative of community served by the institution	⟹	*New content – not addressed in previous framework*
Concept 2 - School/program engages in proactive strategies to recruit and support engagement from students traditionally underrepresented in STEM fields of work and learning	⟹	Indicator ST1.1 – Concept 2 - Outreach activities to support and retain students from under-represented groups are strategic and varied.

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Revised Standard - **Standard 2** - STEM educators collaborate to develop, implement, and improve high quality STEM learning activities		Alignment to Prior STEM Indicator/Concept
Concept 1 - STEM educators and leaders have formal, protected time scheduled on a regular and frequent basis to plan, revise, and improve STEM learning experiences and pedagogical best practices	⇒	Indicator ST 1.7 – Concept 1 – STEM educators meet on a frequent and regular schedule with an established agenda to collaborate, innovate, plan and adjust integrated STEM learning experiences.
Concept 2 - Collaborative time for STEM staff and leadership is structured using a research-based model for effective educator collaboration	⇒	*New content – not addressed in previous framework*

Revised Standard - **Standard 3** - School/program engages diverse STEM community in order to support and sustain STEM programs and initiatives		Alignment to Prior STEM Indicator/Concept
Concept 1 - School/program establishes and maintains sustainable partnerships with a variety of community organizations, including local businesses, STEM practitioners, institutions of higher education, and individuals/families	⇒	Indicator ST 1.10 – Concept 3 - The school/program has begun to implement plans for maintaining the support and engagement of community, post-secondary, and/or business/industry partners and/or families in the STEM school/program.
Concept 2 - School/program proactively seeks resources and support from STEM partners to improve STEM teaching and learning	⇒	Indicator ST 1.10 – Concept 4 - STEM partners frequently seek STEM resources to support the STEM curriculum.

Revised Standard - **Standard 4** - School/program has established a shared vision for STEM and has leadership structures to support effective implementation		Alignment to Prior STEM Indicator/Concept
Concept 1 - School/program has developed a model of shared leadership whereby structures exist both internally (i.e. STEM Leadership Team, STEM Coordinator) and externally (i.e. STEM Advisory Board, STEM Stakeholder Committee) to support and sustain STEM initiatives	⇒	Indicator ST 1.10 – Concept 1 - STEM partners with limited representation of stakeholders meet regularly to collaborate with, support, and sustain the STEM school/program and to create a STEM pipeline.
Concept 2 - STEM leadership has effectively communicated a shared vision and mission for the STEM culture, with goals and intended outcomes for STEM initiatives	⇒	*New content – not addressed in previous framework*

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Revised Standard - **Standard 5** - Leaders ensure that all stakeholders have ongoing opportunities to access information and learn about STEM implementation		Alignment to Prior STEM Indicator/Concept
Concept 1 - School/program utilizes a variety of strategies and platforms to share and communicate STEM vision, mission, goals, outcomes, responsibilities, roles, events, and activities to internal and external stakeholders	⇒	*New content – not addressed in previous framework*
Concept 2 - School/program plans for and facilitates a variety of STEM events and activities for the school community during and beyond the regular school day	⇒	*New content – not addressed in previous framework*

Revised Standard - **Standard 6** - Educators and leaders participate in an ongoing system of STEM-specific professional learning		Alignment to Prior STEM Indicator/Concept
Concept 1 - School/program facilitates professional learning opportunities for educators and leaders that lead to improved efficacy in specific areas of responsibility (such as STEM disciplinary content knowledge or instructional coaching)	⇒	Indicator ST 1.9 – Concept 3 - Professional learning for most STEM educators is usually based on individual needs.
Concept 2 - School/program facilitates professional learning opportunities for educators and leaders that lead to improved efficacy in STEM-specific practices (such as project-based learning, STEM integration, technology integration, etc.)	⇒	Indicator ST 1.9 – Concept 1 - Most STEM educators are usually provided with opportunities to stay current about practices in the STEM world through professional learning.

Revised Standard - **Standard 7** - Students engage collaboratively in authentic inquiry during ongoing units of study		Alignment to Prior STEM Indicator/Concept
Concept 1 - Students are provided opportunities to work collaboratively during project and inquiry-based units of study	⇒	Indicator ST 1.2 – Concept 3 - Students have some opportunities to work independently and collaboratively to solve problems.

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Revised Standard - **Standard 7** - Students engage collaboratively in authentic inquiry during ongoing units of study		Alignment to Prior STEM Indicator/Concept
Concept 2 - Learning experiences provide opportunities for students to engage in authentic inquiry that requires problem identification, investigation, and analysis	⇒	Indicator ST 1.2 – Concept 1 - Learning experiences include real-world, locally-relevant, complex, open-ended problems that require problem identification, investigation, and analysis.

Revised Standard - **Standard 8** - Students engage in self-directed STEM learning guided by educators who are effective facilitators of learning		Alignment to Prior STEM Indicator/Concept
Concept 1 - Students are encouraged to be critical and creative thinkers as owners and managers of their own STEM learning experiences	⇒	Indicator ST 1.3 – Concept 1 - Students have some opportunities to personalize and self-direct their STEM learning experiences.
Concept 2 - STEM educators serve as facilitators who provide guidance and support for students as self-directed learners	⇒	Indicator ST 1.3 – Concept 2 - STEM educators frequently serve as facilitators who provide guidance and support for students as self-directed learners.

Revised Standard - **Standard 9** - School/program provides within-school and extra-curricular opportunities for students to extend STEM learning		Alignment to Prior STEM Indicator/Concept
Concept 1 - School/program provides a variety of STEM-specific extracurricular and extended day opportunities for all learners (clubs, competitions, summer camps)	⇒	Indicator ST 1.11 – Concept 2 - There are multiple extended day opportunities to engage students in STEM learning.
Concept 2 - Students have multiple formal, age-appropriate opportunities to engage with STEM practitioners, community experts, and/or other STEM partners	⇒	Indicator ST 1.10 – Concept 2 - Community, post-secondary and/or business/industry partners regularly engage with teachers and students in the STEM program.

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Revised Standard - **Standard 10** - Students demonstrate their learning through performance-based assessments and have opportunities to develop self-assessment and self-monitoring skills		Alignment to Prior STEM Indicator/Concept
Concept 1 - Students engage in STEM-specific performance assessments that provide opportunities for public demonstrations of learning	⇒	Indicator ST 1.5 – Concept 1 - Most students have multiple opportunities to demonstrate their STEM learning through performance assessments. Indicator ST 1.5 – Concept 2 - Most students have multiple opportunities to present their STEM learning to a range of stakeholders within and outside of the school.
Concept 2 - Students engage in goal-setting, formative self-assessment, and reflections on learning	⇒	*New content – not addressed in previous framework*

Revised Standard - **Standard 11** - STEM learning experiences integrate all STEM disciplines with an emphasis on processes and practices associated with STEM		Alignment to Prior STEM Indicator/Concept
Concept 1 - The curriculum and associated learning activities integrate learning across all STEM disciplines (and additional content disciplines in schools that have adopted other inclusive models of integrated learning, such as The Arts for STEAM schools)	⇒	Indicator ST 1.6 – Concept 2 - The curriculum integrates learning across all of the STEM disciplines.
Concept 2 - The curriculum engages students in STEM processes and practices (such as the Engineering Design Process)	⇒	Indicator ST 1.6 – Concept 5 - The curriculum engages most students in science, technology, engineering and mathematical processes and practices.

Revised Standard - **Standard 12** - School/program provides high quality STEM courses and curriculum aligned to recognized standards and organized into interdisciplinary frameworks		Alignment to Prior STEM Indicator/Concept
Concept 1 - The STEM curriculum is mapped and aligned to formally adopted and recognized sets of standards and/or benchmarks	⇒	Indicator ST 1.6 – Concept 1 - Most of the curriculum is mapped and aligned to internationally accepted standards and/or benchmarks.

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Revised Standard - **Standard 12** - School/program provides high quality STEM courses and curriculum aligned to recognized standards and organized into interdisciplinary frameworks		Alignment to Prior STEM Indicator/Concept
Concept 2 - The STEM curriculum is organized around multiple real world, interdisciplinary problem- and/or project-based units of study	⇒	Indicator ST 1.6 – Concept 3 - The curriculum is organized around some interdisciplinary and authentic problem-based learning experiences.

Revised Standard - **Standard 13** - Students demonstrate STEM content knowledge representative of STEM literacy outcomes that prepare them for the next level of learning and work		Alignment to Prior STEM Indicator/Concept
Concept 1 - School/program has identified learning standards and aligned sources of student performance data for each of the STEM disciplines, as well as content areas included in the institution's integrated model (i.e. STEAM, STREAM, etc.)	⇒	Indicator ST 1.8 – Concept 2 - Data on students' STEM literacy and postsecondary and workforce readiness are based on standardized test results and on some local qualitative and quantitative assessments.
Concept 2 - Trend data indicate student growth and mastery of learning standards and expectations associated with frameworks adopted by the school/program for all STEM disciplines, as well as content areas included in the institution's integrated model (i.e. STEAM, STREAM)	⇒	Indicator ST 1.8 – Concept 1 - Data on students' STEM content knowledge and skills, cross-cutting competencies, and creative and critical thinking strategies demonstrate continuous improvement toward readiness and success at the next level of STEM learning and, for high schools, post-secondary and workforce readiness.

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Revised Standard - **Standard 14** - Students develop STEM skills and cross-cutting competencies that support workforce readiness		Alignment to Prior STEM Indicator/Concept
Concept 1 - School/program has identified discipline-specific skills and cross-cutting competencies (i.e. 21st Century Skills, soft skills) and aligned sources of student performance data for each of these areas	⇒	Indicator ST 1.8 – Concept 2 - Data on students' STEM literacy and postsecondary and workforce readiness are based on standardized test results and on some local qualitative and quantitative assessments.
Concept 2 - STEM events, curriculum, and learning activities provide opportunities for career exploration and workplace experiences	⇒	Indicator ST 1.11 – Concept 1 - Most STEM students participate in an age-appropriate formal program of mentorship, apprenticeship, internships, research, or job shadowing with researchers, business/industry, or other community partners.

Revised Standard - **Standard 15** - School/program engages in a continuous improvement process for STEM		Alignment to Prior STEM Indicator/Concept
Concept 1 - School/program engages in a research-based process for continuous improvement that involves establishing strategic vision and STEM goals, as well as planning for, implementing, monitoring and adjusting STEM initiatives.	⇒	*New content – not addressed in previous framework*
Concept 2 - School/program engages in a process for strategic resource management to ensure that there are adequate resources and supports for the full implementation of the STEM program	⇒	*New content – not addressed in previous framework*

Revised Standard - **Standard 16** - School/program conducts evaluative activities to ensure the effectiveness of STEM implementation		Alignment to Prior STEM Indicator/Concept
Concept 1 - School/program engages in a formal process to evaluate the effectiveness of its STEM initiatives and activities in terms of impact on student learning and development	⇒	*New content – not addressed in previous framework*
Concept 2 - School/program engages in a formal process to evaluate the effectiveness of its STEM initiatives and activities in terms of improvement of professional and teaching practices	⇒	*New content – not addressed in previous framework*

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Appendix

I. Rationale and background for Standard revisions

It is vital for organizations that provide evaluative services to consistently and systematically assess their own processes and content to ensure that the standard frameworks and tools provided for evaluative purposes reflect not only the most current research, but also the data gleaned from previous review activities. Therefore, Cognia is committed to continuous improvement of its own content and protocols. In order to reflect the best and most relevant practices in K-12 STEM education, Cognia convened an internal committee to review its STEM Certification content (11 Indicators) as well as the process for review and evaluation.

Before identifying some of the findings and revisions resulting from the committee's work, it may be helpful to frame the new standards in light of the context for development for the initial STEM Indicators. Cognia initially sought to develop a framework of STEM Indicators, as well as a process for recognizing STEM schools and programs, as a result of many network members seeking guidance for effective STEM practices. The initial STEM framework was developed to complement Cognia's model for school accreditation. For this reason, important areas for effective STEM implementation, such as leadership and continuous improvement, were not originally addressed in the STEM Indicators because these areas are addressed in the accreditation standards. Cognia has since changed its approach and currently allows schools not accredited by Cognia to pursue STEM Certification. As such, the lack of certain themes, such as leadership and continuous improvement, now represent gaps in the STEM Indicator framework. A key rationale for revision was to address these areas that are vital to successful implementation of quality STEM programs.

As the review committee began the process of evaluating revision needs, its work was informed by three main sources of information. First, Cognia has conducted nearly 200 reviews of STEM schools and programs during the past five years. The data gathered by teams and reported by institutions are invaluable in terms of revising and refining our processes. Three examples of these data that supported improvements in the revised framework are 1.) student outcomes, 2.) equitable and inclusive learning, and 3.) student engagement in work-like settings. From a school performance perspective, some challenges have stemmed from problems of practice. Indicator ST 1.8 was the lowest average-rated Indicator across all reviews during the past five years. This Indicator addresses student STEM literacy in a way that is more comprehensive than current practices in most schools. As a result of the challenges associated with adequately addressing student growth and learning to support true readiness, the committee separated the content in ST 1.8 into two standards (13 and 14) in the new framework. A second area of challenge has been interpreting the intent and focus of standards. ST 1.1 in the initial framework emphasizes equitable access to STEM learning. This Indicator generated the most questions from schools regarding the meaning and intention, as well as how the concepts would be evaluated. This feedback led to important revisions for this standard (Standard 1 in the new framework), though Cognia is still

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strongly committed to extending equitable STEM learning opportunities to all students. Similarly, many elementary schools expressed confusion regarding the language of Indicator ST 1.11 in the initial framework due to its reference to internships, externships, research partnerships, etc. The intent of this Indicator was not to engage young students in externships, or to exclude young students from important extensions of STEM learning through engagement with experts. However, the language proved to be problematic for our schools. For this reason, the committee revised the language of the new Standards to clarify the expectations for student learning opportunities.

A second important point of reference for standard revision was an environmental scan of current STEM frameworks used across the US. This review focused on nine different STEM models used by organizations including non-profits, education service agencies, state departments of education, and research teams. There were essentially two criteria for selecting these nine frameworks: 1) each is grounded in research on STEM best practice; 2) Cognia has observed each of the frameworks in use in the field. The scan consisted of an examination and comparison of overall framework structures, themes reflected in standards of practice, and concepts addressed across domains. The goal of this evaluation was not to ensure alignment with or adherence to other models. Instead, our committee sought to better understand the core practices featured in common among differing sets of standards and guidelines so that Cognia could approach the work of supporting STEM implementation in a coherent and consistent way for our national and international network. Though much of this review was helpful in informing the committee's thinking, two observations stood out as being especially impactful. First, there was very little consistency in terms of framework design, domain labels (and constructs), and overall amount of content. Importantly, the design of each model seemed to reflect its purpose. For instance, those frameworks created to support implementation seemed to have a much different design than those frameworks developed for evaluative purposes. Specifically, many standard documents addressing certifications or other recognition programs seemed to place more emphasis on compliance behaviors. Conversely, some frameworks designed to support STEM implementation contain an unwieldy amount of content, which makes self-assessment (or external assessment) quite difficult. Because Cognia seeks to provide a framework that supports both strong implementation for STEM, as well as evaluation of quality programs, we made important structural changes to our model to reflect these dual purposes. Second, the most consistently- identified areas across frameworks seem to deal with inputs into the system (teacher professional development, curriculum, etc.) The least-consistently addressed areas across frameworks seem to be related to outcomes. Though most models addressed student development in areas associated with "readiness", there was limited agreement across models in terms of program effectiveness or strategic management of STEM initiatives. Furthermore, the areas identified as important for student readiness overlap, but are not aligned. In part, due to the limited agreement among organizations regarding STEM outcomes, the committee decided that it would be important to address outcomes through both the evaluative model for certification, as well as within the domain constructs of the framework.

A final source of information informing the review committee's work is new research that has been published to support improved practice in STEM implementation and evaluation of STEM programs. Though there is still a significant lack of longitudinal data available to suggest positive effects for STEM education in K-12 settings as it applies to standardized measures of student achievement, there are a number of policy documents that have examined key practices associated with STEM teaching and programming that seem to result in deeper learning. There are also a number of localized studies and emergent research programs that show early indications of the positive impacts of STEM education in PK-12 settings. In addition to these contributions from researchers in cognitive and non-cognitive sciences, there are a number of organizations that have published forecasts of future needs for workforce and economic development. Many of these studies predict that current teaching and learning practices and "traditional" school models will not be sufficient in preparing our workforce to address future needs. While the emergent research in STEM education has not influenced significant changes to the existing standard content, these studies and policy guidance have further emphasized the need to create outcomes-oriented models for evaluation. This includes models for implementation that align change-management strategies with STEM-specific practices to support improvement in leadership efficacy, teaching practices, and learning behaviors.

II. Concepts from original STEM Indicators not addressed in new STEM Standard framework

It should be noted that all of the concepts below represent best practices for any STEM school or program. Ultimately, there was the need to make difficult decisions in order to maintain an appropriate amount of content and focus for the new standard framework. In some cases, these decisions were based on core philosophy. For example, the exclusion of a standard addressing technology in the new Standard framework is based on the belief that none of the STEM disciplines should be singled out or siloed. However, it is still vital that all students in STEM schools and programs have access to and use technology and tools for learning on a daily basis. There were other concepts that were difficult to remove but that are addressed, to an extent, by a different standard. For example, ST 1.6 - Concept 4 (see below) is a vital component of learning experiences for students. However, this expectation is reflected in Standard 14 of the new framework, albeit in the form of student outcomes rather than STEM curriculum.

Concepts excluded from the Revised Standards
Indicator ST 1.1 – Concept 1 - *The school/program has a STEM outreach plan with measurable goals to increase enrollment, support, and retention of students from under-represented groups and can demonstrate progress meeting such goals.*
Indicator ST 1.2 – Concept 2 - *Creative problem solving is encouraged.*
Indicator ST 1.4 – Concept 1 - *Most students use a range of technological resources in their STEM learning experiences during, after and away from school.*

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Indicator ST 1.4 – Concept 2 - *Most students use technology to conduct research, demonstrate critical and creative thinking, and communicate and work collaboratively.*
Indicator ST 1.5 – Concept 3 - *Most students have multiple opportunities to clarify, elaborate on, and defend their thinking and conclusions using verbal, symbolic, and visual means.*
Indicator ST 1.6 – Concept 4 - *The curriculum provides learning experiences for most students that develop cross-cutting competencies (e.g., collaboration) necessary for college and career.*
Indicator ST 1.7 – Concept 2 - *STEM educators regularly review student work together as an interdisciplinary team.*
Indicator ST 1.7 – Concept 3 - *Teachers have regular common planning time to collaborate and discuss integrated STEM curricular and instructional practices.*
Indicator ST 1.9 – Concept 2 - *STEM educators have multiple opportunities to expand their proficiency in the use of technology.*

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SUBJECT
Request for Declaratory Rulings

REFERENCE

June 29, 2020	Petition for Declaratory Rulings by the Board pursuant to Section 67-5232, Idaho Code, received at the Office of the State Board of Education.

APPLICABLE STATUTE, RULE, OR POLICY
Section 67-5232, Idaho Code
Sections 74-402 and 74-403, Idaho Code
Section 18-1356(6), Idaho Code
Idaho Administrative Code, IDAPA 08.02.02.076, Code of Ethics for Idaho Professional Educators
State Board of Education Governing Policy and Procedures Section II.Q., Code of Ethics and Ethical Conduct – All Employees

BACKGROUND/DISCUSSION
On June 29, 2020, the Office of the State Board of Education received a petition submitted by Petitioner Karen McGee ("Petitioner") requesting that the Board issue declaratory rulings pursuant to the Idaho Administrative Procedures Act, Idaho Code, Section 67-5253 which provides:

> 67-5232. DECLARATORY RULINGS BY AGENCIES. (1) Any person may petition an agency for a declaratory ruling as to the applicability of any statutory provision or of any rule administered by the agency.
> (2) A petition for a declaratory ruling does not preclude an agency from initiating a contested case in the matter.
> (3) A declaratory ruling issued by an agency under this section is a final agency action.

The Petition asks the Board for declaratory rulings on the applicability of following to the allegations set forth in the Petition:

- Sections 74-402 and 74-403, Idaho Code (Ethics in Government)
- Section 18-1356(6), Idaho Code (Gifts to Public Servants by Persons Subject to their Jurisdiction)
- Idaho Administrative Code, IDAPA 08.02.02.076, Code of Ethics for Idaho Professional Educators
- Board Policy II.Q., Code of Ethics and Ethical Conduct – All Employees

The Petition concerns the actions of an employee of the National Association of Charter School Authorizers (NACSA). The Petition alleges that an employee of NACSA extended to an employee of the Idaho Public Charter School Commission (Charter Commission) an opportunity to apply for contract work as a "Leaders

Program Coach" for NACSA after or while NACSA performed a "formative evaluation" of the Charter Commission. The formative evaluation attached to the Petition as Exhibit D indicates that it was funded by the U.S. Department of Education through the National Charter School Resource Center. The Petition states that the Charter Commission employee did not apply for or accept employment from NACSA. The Petition does not allege that any Charter Commission employee acted inappropriately or in violation of state law or Board policy.

Sections 74-402, 74-403 and 18-1356(6), Idaho Code

The Petition partially quotes from the Ethics in Government Act and the Bribery and Corruption Act and requests that the Board issue a ruling as to the applicability of the above statutes. The Board does not have statutory authority to enforce either statute against an employee of NACSA. Additionally, the Petition does not describe facts which would indicate that a Charter Commission employee was offered or received a gift or pecuniary benefit from NACSA. The Petition does not allege that NACSA was a party to a contract with the Charter Commission or in any manner subject to the jurisdiction or authority of the Charter Commission. Notification of an opportunity to apply for employment is not a gift or pecuniary benefit.

Idaho Administrative Code, IDAPA 08.02.02.076, Code of Ethics for Idaho Professional Educators and Board Policy II.Q

The Petition request a written declaratory ruling as to whether the conduct of NACSA constituted an attempt to create a violation of professional educator and education staff ethics and vendor or potential vendor rules. IDAPA 08.02.02.076 applies to Idaho certified professional educators. The Petition does not allege that NACSA or any of its employees are Idaho certified educators. The Code of Ethics for Idaho Professional Educators is not applicable to non-educators. Although not cited, it appears that the Petition is quoting from Board Policy II.Q which is a Board policy applicable to employees employed by entities governed by the Board. The Policy does not apply to NACSA as it is not an institution or agency under the Board's governance. As stated above, there is no allegation that the Charter Commission employee acted inappropriately or in violation of state law or Board policy.

IMPACT
This matter does not impact any Board strategic objectives or goals.

ATTACHMENTS
Attachment 1 – June 29, 2020 Petition for Regulatory Ruling
Attachment 2 – Proposed final order by the Board

STAFF COMMENTS AND RECOMMENDATIONS

The Board does not have statutory authority to order or recommend that a third party not employed by an institution or agency under the governance of the Board be investigated for offering a Charter Commission employee an opportunity to apply for employment. There is no allegation that the Charter Commission paid NACSA for the "formative evaluation." There is no allegation that the Charter Commission employee accepted NACSA's offer to apply for employment. There is no allegation that the Charter Commission employee committed any ethical violations.

Staff recommend that the Petitioner's request for declaratory rulings be denied and that the Board enter the proposed final order attached as Attachment 2.

BOARD ACTION

I move to deny the Petition for Declaratory Rulings submitted by Petitioner Karen McGee and authorize the Board President to execute the Final Order included in Attachment 2.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

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BEFORE THE DIRECTOR OF THE IDAHO STATE BOARD OF EDUCATION

In the Matter of the action of the	)	PETITION FOR DECLARATORY
National Association of Charter	)	RULING PURSUANT TO IDAHO
School Authorizers	)	CODE SECTION 67-5232
	)	

COMES Now Karen McGee, former Chair of the Idaho State Board of Education, in her

personal capacity and hereby petitions the Idaho State Board of Education for a

DECLARATORY RULING pursuant to the provisions of Idaho Code Section 67-5232, stating,

alleging and requesting as follows:

I.

STATEMENT OF FACTS

1. The Idaho Public Charter School Commission, created and operating pursuant to Idaho

Code 33-5213, is an executive subagency of the Board of Education, State of Idaho, comprised of

seven gubernatorial and legislature leader appointees.

2. On July 17, 2019, Tamara Baysinger was a state public official employed as the

salaried Director of the Idaho Public Charter School Commission (IPCSC) (She resigned

December 31, 2019) During her tenure, she supervised contracts and approved payments.

3. The National Association of Charter School Authorizers, (NACSA) a non-profit

PETITION FOR DECLARATORY RULING - 1

corporation headquartered in Chicago, Illinois in July of 2019 was an entity interested in an

official transaction or proceeding before the Commission, in that:

    a. In late 2018, NACSA was retained to perform a formative evaluation of the

IPCSC and to make policy recommendations to the IPCSC (See Exhibit "D"

hereto.) In these evaluations, NSCSA advocates for charter authorizing entities

such as the IPCSC to adopt specific policies and procedures related to charter

schools which it advances nationally.

    b. IPCSC joined and paid membership dues and other fees to NACSA during

2019. The payment to NACSA was directly approved by IPCSC Director

Baysinger.

    c. Said contract and process was ongoing on July 17, 2019 and said membership

was active.

    d. NACSA serves as vendor and consultant to statewide charter authorizing

bodies like IPCSC.

    4. In July of 2019, Greg Richmond was Chief executive Officer of NACSA, directing its

operations and staff as a full time paid executive officer.

    5. On July 17 of 2019, David Greenberg, in his role as Director of Leadership

Development for NACSA, sent a one page email with a three page attachment to IPCSC Director

Baysinger offering her a position as a "Leaders Program Coach" for NACSA at a proposed

compensation of "$5,000 in total per leader coached," plus expenses to attend the "first in person

session" and the "final in person session." A copy of said solicitation and offer is attached hereto

PETITION FOR DECLARATORY RULING - 2

and incorporated herein as Exhibit "A"

6. Upon information and belief, Director Baysinger did not accept the offer.

7. However, the "offer" and "agreement to confer" the benefits was "knowingly" made, as is reflected in the July 17, 2019 written communication made by the person or persons and organization identified above.

8. Per additional attached materials, NACSA may have engaged in a related and comparable common scheme or plan of improper conduct in other states, including Georgia and Nevada, where criminal and/or ethics investigations have ensued.

In South Carolina, the NACSA payments to a public official were found to have not been made in accord with public employee outside employment regulations and new ethics provisions were recommended. In Georgia, the NACSA was found to have violated two ethics and governmental transparency provisions by not reporting the payment to a public official.

In Nevada, the state charter authority was held to have violated the state's public records act by concealing documents that evidenced the personal payment by NACSA to a public official there. The national notoriety among select state public officials of NACSA offering personal payments is evidenced by the attached email from Delaware, where a public official wrote Mr. Richmond seeking side consulting opportunities and Mr. Richmond responded with an offer to "creatively" invoice the state in order to facilitate a payment to NACSA that would have been in violation of the state's fiscal rules. (See Exhibit "B," hereto)

9. Mr. Richmond has now become employed via a Boise based non-profit called BLUUM to become the "Chief Officer of Growth and Strategy" with involvement in distributing

PETITION FOR DECLARATORY RULING - 3

Federal Grant funds of a reported $17.1 million to Idaho schools in which the IPCSC will have

continuing involvement and oversight. (See Exhibit "C," hereto.)

II.

APPLICABLE STATUTES

10. The "Ethics in Government" policy for all Idaho public officials is stated in Idaho

Code Section 74-402, as follows:

> "Policy and Purpose. It is hereby declared that the position of a public
> official at all levels of government is a public trust and it is in the public
> interest to:
> (1) Protect the integrity of government through the state of Idaho while
> at the same time facilitating recruitment and retention of personnel
> needed within government;
> (2) Assure independence, impartiality and honesty of public officials in
> governmental functions;
> (3) Inform citizens of the existence of personal interests which may
> present a conflict of interest between an official's public trust and private
> concerns;
> (4) Prevent public office from being used for personal gain contrary to
> the public interest;
> (5) Prevent special interests from unduly influencing governmental action;
> and
> (6) Assure that governmental functions and policies reflect, to the maximum
> extent possible, the public interest."

11. This standard is supported and clarified by "Definitions" codified in Section 74-403

which make it clear in certain subsections that:

A. Per subsection (6), the IPCSC Commission is a "governmental entity" covered

by the Act.

B. Per subsection (10) (d), Tamara Baysinger was an "employed public official"

covered by the Act.

PETITION FOR DECLARATORY RULING - 4

C. Per subsection (5), the transaction described in Paragraph 5 of this Petition above proposed an "economic gain" to Ms. Baysinger, of pecuniary value from sources other than her lawful compensation as a public official, as covered by the Act.

D. And per subsection (1), both the IPCSC and the NACSA, on or about July 17, 2019 were mutually engaged in "official action" with decisions, considerations, and policy matters pending related to Idaho Charter Schools, as covered by the Act.

12. Idaho Code Section 74-404, REQUIRED ACTION IN CONFLICTS, Subsection (6) provides that an:

> "executive branch of state government" . . . (may establish) "an ethics
> board or commission," . . . . . which "shall have specifically stated powers
> and duties including the power to " . . . . "(c) Accept complaints of
> unethical conduct from the public and take appropriate action."

13. In the absence of the State Board of Education having established such an ethics board or commission as to staff employees, the Board itself is the proper entity to investigate, rule upon and enforce appropriate action under the Idaho Ethics in Government Act after receipt of such a public complaint.

14. Further, Idaho Code Section 18-1356 (6) makes a misdemeanor crime of the act of Offering Gifts to Public Servants by Persons Subject to their Jurisdiction.

III.

APPLICABLE IDAPA RULES AND POLICIES

15. The State Board of Education, Idaho Administrative Code, IDAPA Rule 08.02.02.076 Code of Ethics, subsection .07 specifically prohibits as unethical conduct for professional educators

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the following:

"b. Acceptance of gifts from vendors or potential vendors for personal use or gain

where there may be the appearance of a conflict of interest;"

"d. Soliciting, acceptance or receiving a financial benefit greater than $50 . . . ."

16. IDAPA Rule 08.02.02.076.02 requires that "A professional educator abides by all

federal, state and local education laws and statutes."

17. The State Board of Education Handbook adopted pursuant to IDAPA 08.02.02.076 under

"Conflict of Interest and Ethical Conduct" contains the following relevant provisions:

> "1. General Principles of Ethical Conduct
> All employees of the institutions, and agencies; . . . . .
> a. Shall not hold financial interests that are in conflict with the
> conscientious performance of their official duties and responsibilities:
> b. Shall not engage in any financial transaction in order to further any
> private interest using nonpublic information of the Board, institution,
> or agency;
> f. Shall act impartially and not give preferential treatment to any
> private or public organization or individual; . . . . .
> h. Shall not engage in outside employment or activities, including
> seeking or negotiating for employment, that conflicts with official
> duties and responsibilities; . . . .
> 2. Conflict of Interest
> A conflict of interest occurs when a person's private interests compete
> with his or her professional obligations to the Board-governed entity to a
> degree that an independent observer might reasonably question whether
> the person's professional actions or decisions are materially affected
> by personal considerations, including but not limited to personal gain,
> financial or otherwise."

IV.

REQUEST FOR RULINGS

18. Idaho Code Section 67-5232 provides that "Any person may petition an agency as to the

PETITION FOR DECLARATORY RULING - 6

applicability of any statutory provision or of any rule administered."

19. The Petitioner hereby asks the Idaho State Board of Education for a written declaratory ruling as to the applicability of the provisions of Idaho Code Sections 74-402, 74-403 and 18-1356(6) to the facts alleged above in Paragraphs 1 through 9 of this Petition, as administered by the agency.

In particular:

A. Did the conduct of NACSA constitute an improper, unethical and unlawful offer or agreement to confer benefits upon a state education public official?

B. Should the engagement, current and future role of NACSA and Greg Richmond with the IPCSC and grants related thereto be investigated in light of such acts?

20. Further, the Petitioner hereby asks the Board for a written declaratory ruling regarding the facts alleged in Paragraphs 1 through 9 above on this Petition, as to IDAPA Rule 08.02.02.076 and related Handbook provisions which are administered by the agency:

A. Did the conduct of NACSA constitute an attempt to create a violation of professional educator and education staff ethics and vendor or potential vendor rules?

B. Should the engagement, current and future role of NACSA and Greg Richmond with the IPCSC and grants related thereto be investigated and/or acted upon pursuant to the IDAPA or Handbook authority of the Board?
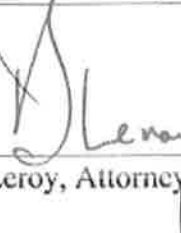
PETITION FOR DECLARATORY RULING - 7

DATED This __31___ day of May, 2020.

Respectfully Submitted:

_____
Petitioner

_____
David H. Leroy, Attorney for the Petitioner

PETITION FOR DECLARATORY RULING - 8

Tamara Baysinger

From:	David Greenberg <davidg@qualitycharters.org>
Sent:	Wednesday, July 17, 2019 9:01 PM
To:	davidg@qualitycharter.org
Subject:	Coaches for the NACSA Leaders Program - Cohort 8
Attachments:	Leaders Program Coach Application.docx

Dear, Leaders Program Alumni including recent (and not so recent) Coaches,

We are seeking the next group of Coaches to support the 8th cohort of the NACSA Leaders Program, which launches this October at the Leadership Conference.

As an alum of the program, you know how integral the Coaches are to the Leaders' experience. I encourage you to apply to be a Coach—and to pass this on to someone who would make a great Coach.

We have made some changes to the Leaders Program for Cohort 8, some of which will impact the role of the Coach. Specifically:

- The program runs from October 2019 (Conference) to October 2020 (Conference), and Coaches are involved for the entire 12-month period;
- Coaches will visit their Leaders twice during the program; and
- Leaders will complete a capstone project that uses action-research to assess the impact of innovations in authorizing designed to address a challenge in their office or in the field. Coaches and Leaders will receive training and support from NACSA on the action-research process, and coaches will provide support to leaders throughout the program.

As always, we are seeking a diverse group of individuals who bring leadership experience, authorizing experience, and coaching presence to work with our next cohort of approximately 12 Leaders. To ensure diversity of thought and experience among coaches, we seek a balance of new and experienced Coaches and individuals who have completed the Leaders Program and those who have not.

Attached is additional information on coaching, including the application.

Don't hesitate to reach out if you have any questions about coaching or the Leaders Program in general.

Sincerely,
David

David Greenberg, Director of Leadership Development
NATIONAL ASSOCIATION OF CHARTER SCHOOL AUTHORIZERS
Direct: (612) 868-0232 | davidg@qualitycharters.org | www.qualitycharters.org

EXHIBIT "A"

GATEWAYS TO IMPACT

2019 NACSA LEADERSHIP CONFERENCE
ST. LOUIS | OCTOBER 21-24, 2019
↻ REGISTER NOW!

2

LEADERS
★
PROGRAM

Leaders Program Coach Application - Cohort 8

Background

The NACSA Leaders Program is the nation's only professional development opportunity of its kind specifically designed for charter school authorizing professionals. The rigorous, yearlong program brings together a diverse group of approximately 12 current and up-and-coming Leaders committed to advancing the work of authorizing and honing their leadership skills to grow more great schools in their communities. Throughout the program, Leaders explore best practices, grapple with their current challenges, and examine what it means to lead in a dynamic public education environment.

Coaching

One-on-one coaching is a core component of the Leaders Program. Each Leader is matched with a Coach who provides support for the Leader in the areas of self-leadership, people-leadership, organization-leadership, and practice-leadership. The formal coaching relationship spans the entire 12-month program (and informal relationships often sustain well beyond) and includes scheduled and consistent one-on-one phone/video calls and two site visits by the Coach to the Leader's office.

Capstone Project – Action-Research

Each Leader will complete an action-research capstone project to assess the impact of innovations in authorizing designed to address a challenge in their office or in the field. Coaches and Leaders will receive training and support from NACSA on the action-research process, and Coaches will provide support to Leaders throughout the Program.

Coach Profile

NACSA is seeking coaching candidates who bring leadership experience, authorizing experience, and coaching presence to work with our next cohort of leaders. NACSA particularly seeks individuals who reflect the diversity and experience of students in charter schools throughout the country. To ensure diversity of thought and experience among coaches, we seek a balance of new and experienced coaches and individuals who have completed the Leaders Program and those who have not.

Compensation & Expenses

Coaches will be compensated $5,000 in total per Leader coached. NACSA will cover expenses related to attendance at the first in-person session (in St. Louis) and the final in-person session (in Nashville). NACSA will also cover all travel, lodging and incidental expenses for the two on-site visits.

To Apply

Please review the expectations on the following page. If you can meet those expectations and are interested in being a Coach, submit the completed application along with your resume to David Greenberg, davidg@qualitycharters.org, by August 14 at 5:00 PM CT.

Thank you for your interest in being a Cohort 8 Leaders Program Coach!

LEADERS
─★─
PROGRAM

Leaders Program Coach Application – Cohort 8

Name: **Date:**

The following are expectations for Coaches. Please review these carefully. If you are not able to fulfill these expectations, unfortunately you will not be able to coach this year. I realize that things come up, but if you know now that you will not be able to make any of these dates/fulfill any of these expectations, please do not submit an application to coach this year.

Expectations

Timeframe/Date	Activity
August 14, 2019	Coach Application Due by 5:00pm CT
By Monday, September 16, 2019	Coaches Notified of Selection
Tuesday, September 24, 2019: 2:00pm – 3:00 pm CT	All Coach Kick-Off Call
Tuesday, October 1, 2019: 2:00pm – 3:00 pm CT	All Coach Virtual Training Part I
Tuesday, October 8, 2019: 2:00pm – 3:30 pm CT	New Coach Virtual Training - Part II (Mandatory for new Coaches, optional for returning Coaches)
Tuesday, October 15, 2019: 2:00pm – 3:30 pm CT	New Coach Virtual Training Part III (Mandatory for new Coaches, optional for returning Coaches)
Sunday, October 20, 2019: 2:00pm - 5:00pm	All Coach In-Person Training Workshop in St. Louis (2019 NACSA Conference Location)
Sunday, October 20, 2019: 5:00pm – 6:00pm + Dinner; Monday, October 21: 8:30am - 2:30pm	Participate in First In-Person Leaders Program in St. Louis (2019 NACSA Conference Location)
November 2019 – October 2020	Ongoing coaching calls with your Leader. Specific frequency and duration of calls to be agreed upon by Coach and Leader – expected to be approximately 4 hours per month.
Dates TBD (November 2019 – September 2020)	Two-three additional training and/or check-in calls throughout the program.
November 2019 – January 2020	1st Site Visit to Leader
May 2020 – August 2020	2nd Site Visit to Leader
Sunday, October 11, 2020 - 4:00pm – Monday, October 12 at 3:30pm	Participate in Final In-Person Leaders Program Session in Nashville (2020 NACSA Conference Location)

By submitting this application, you are confirming that you have read the expectations and based on the knowledge that you have at this time, confirm that you can meet all of the expectations as outlined in this document.

Please respond to the following questions:

1. Why do you want to be a coach for the Leaders Program?

2. What training and/or experience do you have related to coaching and how has that prepared you to be an effective Coach for the Leaders Program? If you have been a Coach in the Leaders Program previously, include what you have learned and how you have grown as a coach through that experience. Please be specific.

3. Briefly describe your experience with charter school authorizing.

4. How would you define coaching?

5. Paint a picture of what an effective coaching relationship looks like, in your view.

6. Please identify your top 2-4 strengths as a Coach and explain how you would utilize each of those strengths in your coaching.

7. What aspect(s) of coaching do you or might you (if new to coaching) find most challenging? What strategies have you used or might you use to manage those challenges?

8. What are the top 3-5 qualities/characteristics you feel are the most critical for an effective Coach to embody?

9. If you are selected as a Coach, NACSA will provide training and support for you to provide support to your Leader in his/her capstone project which involves "action research" that is designed to drive innovation and measure the impact of new practices in his/her office. What is your experience with "action research" and how will you approach providing support to your Leader on this project?

10. Do you know your MBTI type? If so, please identify it below. (NOTE: This will NOT be used in the Coach selection process. It is, however, useful information to have for the Coach/Leader matching process. If you do not know it and are selected to serve as a Coach, we will ask you to take the MBTI via an online system.)

Please submit this completed application <u>along with your resume</u> to David Greenberg: <u>davidg@qualitycharters.org</u> no later than August 14, 2019 at 5:00 PM CT.

OFFICE OF THE STATE INSPECTOR GENERAL

BRIAN P. KEMP
Governor

DEBORAH WALLACE
State Inspector General

March 4, 2019

Gregg Stevens
Interim Executive Director
State of Georgia Charter Schools Commission
1470B Twin Towers East
205 Jesse Hill Jr. Drive SE
Atlanta, GA 30334

Reference: OIG File No: 19-0018-I

Dear Mr. Stevens:

On September 25th, 2018, following receipt of a complaint, the Office of the State Inspector General (OIG) opened an investigation into allegations of violations of the state of Georgia's code of ethics by former State Charter School Commission (SCSC) Executive Director, Bonnie Holliday. The allegation related to Ms. Holliday's acceptance of $1,000 from state vendor, National Association of Charter School Authorizers (NACSA), in 2017. On December 11, 2018, we received a second complaint regarding allegations of violations of Georgia code section 45-1-16 by NACSA. The allegation related to NACSA's failure to disclose travel expenses that were paid on behalf of Ms. Holliday exceeding $250 in the 2017 calendar year to the State of Georgia's Government Transparency and Campaign Finance Commission ("the Commission"). The allegation also related to NACSA's failure to provide financial statements to the state auditor as a nonprofit organization.

During the investigation, OIG conducted interviews, reviewed official files and documents, and conferred with the Attorney General's Office about whether NACSA violated state law. Specifically, OIG sought to determine if Ms. Holliday's acceptance of $1,000 from NACSA was considered a gift and violated Georgia Governor's Executive Order Establishing a Code of Ethics ("state ethics code"). OIG also sought to determine if NACSA failed to disclose travel expenses paid on behalf of Ms. Holliday to the Commission as required per the state ethics code. Finally, OIG sought to determine if NACSA as a nonprofit organization, failed to provide financial statements to the state auditor as required per Georgia code section 50-2-3.

EXHIBIT "B"

2 Martin Luther King, Jr. Drive, SW • 1102 West Tower • Atlanta, Georgia 30334
Phone: 404.656.7924 • Toll-Free 866.435.7644

Reference: OIG File No: 19-0018-I

OIG confirmed that NACSA is a state vendor and that the Department of Education has paid the vendor $336,372 since 2015. OIG further confirmed that NACSA offered Ms. Holliday and Mr. Gregg Stevens, SCSC General Counsel at the time, a $1,000 stipend to work as a session manager at their annual conference. Mr. Stevens declined the stipend. As of 2015, NACSA has not offered any other SCSC employees a stipend. Per the state ethics code, no employee, nor any person on his or her behalf shall accept, directly or indirectly, any gift from any person with whom the employee interacts on official state business, including without limitation, lobbyists and vendors. If a gift has been accepted, it must be either returned to the donor or transferred to a charitable organization. OIG determined that Ms. Holliday executed an agreement with NACSA on September 18, 2017 requiring Ms. Holliday to perform various services, including attending the 2017 NACSA Annual Conference, for a flat fee of $1,000. Based on the employment agreement between the two parties, the OIG considers the $1,000 fee to be outside employment income rather than a gift. OIG further determined that Ms. Holliday disclosed the agreement to the SCSC General Counsel and Ethics Officer at that time. However, Ms. Holliday did not take any leave from her role as the Georgia SCSC Executive Director during her attendance at the NACSA conference. Ms. Holliday's concurrent employment with NACSA while she was acting in her role as the state's SCSC Executive Director appears to violate the Rules of the State Personnel Board section 478-1-.07 regarding outside employment, specifically conflicting employment activity.

Per Georgia code section 50-2-3, before entering into a financial agreement with a nonprofit organization, the head of the contracting state organization shall require the nonprofit organization to furnish financial information and forward the information to the state auditor. State agencies are required to report contracts entered into with non-profit organizations so DOAA is aware that they need to request financial statements from the organization. OIG confirmed with the Department of Audits and Accounts (DOAA) Nonprofit and Local Government Audit Section that none of the state agencies have reported contracts between the state and NACSA to their office to date.

OIG confirmed that NACSA reimbursed Holliday for travel expenses to a NACSA task force meeting on two separate occasions in June and August 2017 totaling $1,028.42. Georgia code section 45-1-16 requires that any vendor who, either directly or through another person, makes a gift or gifts to one or more public employees exceeding in the aggregate $250 in value during any calendar year shall file a disclosure report with the Commission. We referred the complaint to the Commission and determined that NACSA had not filed a report with the Commission at the time of the complaint. However, the organization has since contacted the Commission to file disclosure reports for past years and pay late fees. The OIG encourages the SCSC to take appropriate steps to ensure vendor compliance with state law to prevent conflicts of interest and verify services can be provided based on the organization's financial capability.

2 Martin Luther King, Jr. Drive, SW • 1102 West Tower • Atlanta, Georgia 30334
Phone: 404.656.7924 • Toll-Free 866.435.7644

PPGA   **TAB 8 Page 15**

Reference: OIG File No: 19-0018-I

Per the state ethics code, an employee on whose behalf actual and reasonable expenses for food, beverages, travel, lodging, and registrations are paid to permit the employee's participation in a meeting related to official or professional duties of the employee shall file a report no later than 30 days after such expenses are paid. The report shall be filed with the designated Ethics Officer. The SCSC Ethics Officer at the time of Ms. Holliday's employment provided a report that Ms. Holliday filed with him regarding the June 2017 expense reimbursement from NACSA. However, no report was on file for the August 2017 expense reimbursement.

Ms. Holliday resigned from her position with SCSC on January 15, 2019 for a position with the Georgia Charter Schools Association. Based on Ms. Holliday's resignation and NACSA's remedial measures taken, OIG considers this matter closed. OIG appreciates the time and assistance provided by the Department of Education and specifically, SCSC, throughout the course of our investigation.

Sincerely,

Deborah Wallace, CIG, CFE
Inspector General

DW: jg

cc: Tim Flemming, Office of the Governor Chief of Staff
        Stacey Suber Drake, Department of Education General Counsel
        Bethany Whetzel, Georgia Government Transparency and Campaign Finance
            Commission Deputy Executive Secretary
        Jackie Neubert, Department of Audits and Accounts Nonprofit and Local
            Government Audit Section Manager

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PPGA   **TAB 8 Page 16**

1 | Joel E. Tasca, Esq.
Nevada Bar No. 14124
2 | Joseph P. Sakai, Esq.
Nevada Bar No. 13578
3 | BALLARD SPAHR LLP
1980 Festival Plaza Drive, Suite 900
4 | Las Vegas, Nevada 89135
Telephone: (702) 471-7000
5 | Facsimile: (702) 471-7070
tasca@ballardspahr.com
6 | sakaij@ballardspahr.com

REC'D & FIL...
2019 OCT 31 AM 11: 02

Docket

7 | *Attorneys for Petitioner*

8 | **IN THE FIRST JUDICIAL DISTRICT COURT OF THE STATE OF NEVADA**

9 | **IN AND FOR CARSON CITY**

10 | NATIONAL COALITION FOR PUBLIC SCHOOL OPTIONS,

Case No. 19 OC 00050 1B

11 | Petitioner,

Department No. 2

12 | v.

13 | NEVADA STATE PUBLIC CHARTER SCHOOL AUTHORITY,

14 | Respondent.

15 |

16 |
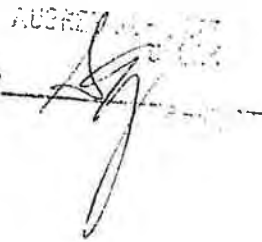
ORDER GRANTING WRIT OF MANDAMUS

17 | Petitioner National Coalition for Public School Options ("PSO") commenced this action on

18 | March 11, 2019, with the filing of its Verified Public Records Act Application Pursuant to Nev.

19 | Rev. Stat. § 239.011/Petition for Writ of Mandamus. Through the Petition, PSO requested an

20 | Order requiring Respondent Nevada State Public Charter School Authority ("SPCSA") to provide

21 | access to public records responsive to PSO's various public records requests. The Court, having

22 | considered the Petition, and no responsive briefing having been filed by the SPCSA, finds that the

23 | Petition should be, and hereby, is **GRANTED** as follows:

24 | ### FINDINGS OF FACT

Sidebar: BALLARD SPAHR LLP
1980 FESTIVAL PLAZA DRIVE, SUITE 900
LAS VEGAS, NEVADA 89135
(702) 471-7000 FAX (702) 471-7070

1   The Court finds that the following facts were proven by a preponderance of the evidence:

2   1.   Pursuant to Nevada's Public Records Act, Nev. Rev. Stat. § 239.010, *et seq.* (the

3   "NPRA"), PSO requested public records from SPCSA via four separate public records requests.

4   2.   PSO made its first two public records requests on May 4, 2018. PSO's first public

5   records request sought "any and all email communications between the Authority and [NACSA]

6   which were sent on or after June 1, 2016. . ." PSO's second public records request sought "public

7   records related to or documenting any costs, including all travel or other expense reimbursements,

8   related to the meeting of the Authority Board on April 27, 2018."

9   3.   SPCSA provided documents responsive to PSO's second May 4, 2018 request on

10   June 22, 2018.

11   4.   PSO made its third public records request on June 6, 2018, seeking records related

12   to:

13   [T]he Authority's review, approval, and/or denial of any request by the Authority's
     Executive Director to pursue any other business or occupation or hold any other
14   office, including, without limitation, to serve as a member on a committee, boar or
     task force of an organization relating to charter schools, to serve as a reviewer of
15   applications to form a charter school for organizations other than the State Pubic
     Charter School Authority and/or to hold an office of profit. . ."
16

17   5.   PSO made its fourth public records request on September 28, 2018, seeking records

18   related to:

19   1) any communications between the Authority and the TenSquare Group and/or
     Joshua ("Josh") Kern (collectively "TenSquare") which were sent on or after June
20   1, 2016; and 2) any and all communications between members, employees, staff, or
     other individuals working with the Authority relating to TenSquare, which were
21   sent on or after June 1, 2016.

22   6.   SPCSA provided additional documents responsive to PSO's records requests on

23   December 7, 2018, and December 13, 2018.

24   7.   In response to PSO's records requests, SPCSA never made any claim of

2

1 confidentiality or privilege as to any responsive document.

2   8.   In response to PSO's records requests, SPCSA should have produced – but did not

3 – an email dated October 20, 2016, from E. Westapher, Director of Authorizer Development for

4 NACSA, to various individuals, including P. Gavin, former executive director of SPCSA.

5   9.   PSO may be in possession of other documents that SPCSA should have produced in

6 response to PSO's public records requests, but did not, as evidenced by the unproduced October

7 20, 2016, email.

8   10.   PSO commenced this action to request a writ of mandamus directing SPCSA to

9 produce all responsive records.

10   11.   On September 10, 2019, pursuant to a stipulation between PSO and SPCSA, PSO

11 submitted its Opening Brief in Support of Public Records Act Application and Petition for Writ of

12 Mandamus.

13   12.   SPCSA's response brief was due on or before September 24, 2019.

14   13.   On October 15, 2019, the Court, noting SPCSA had not filed its response to the

15 opening brief on September 24, 2019, provided SPCSA with an October 25, 2019, deadline to file

16 a brief with points and authorities as to why the Court should not grant PSO's Petition in full.

17   14.   SPCSA did not file a response brief on or before the Court's October 25, 2019

18 deadline.

19   **CONCLUSIONS OF LAW**

20   15.   SPCSA is a state agency subject to disclosure requirements under the NPRA.

21   16.   The NPRA compels SPCSA to produce all relevant documents in response to public

22 records requests, absent a claim of privilege or confidentiality. Nev. Rev. Stat. § 239.010.

23   17.   SPCSA has not made a timely claim of privilege or confidentiality as to any

24 documents responsive to PSO's public records requests.

BALLARD SPAHR LLP
1980 FESTIVAL PLAZA DRIVE, SUITE 900
LAS VEGAS, NEVADA 89135
(702) 471-7000 FAX (702) 471-7070

3

18.   SPCSA's failure to produce all documents responsive to PSO's public records requests is in violation of Nev. Rev. Stat. § 239.01.

19.   Based upon SPCSA's failure to produce all responsive documents, PSO is entitled to a writ of mandamus directing SPCSA to produce all responsive documents.

Consistent with the foregoing, it is hereby ORDERED that:

1.   SPCSA is directed to produce all documents responsive to PSO's records requests within 5 business days of being served with notice of entry of this Order, including, without limitation, the email dated October 20, 2016, from E. Westapher, Director of Authorizer Development for NACSA, to various individuals, including P. Gavin, former executive director of SPCSA;

2.   PSO may move for its reasonable attorneys' fees and costs incurred in bringing the Petition, pursuant to Nev. Rev. Stat. § 239.011(2) and any other applicable law.

DATED: _October 30_, 2019

_____
THE HONORABLE JAMES WILSON
DISTRICT COURT JUDGE

4

1   Submitted by:

2   Ballard Spahr LLP

3   By: _____
       Joel E. Tasca, Esq.
4   Nevada Bar No. 14124
       Joseph P. Sakai, Esq.
5   Nevada Bar No. 13578
       1980 Festival Plaza Drive, Suite 900
6   Las Vegas, Nevada 89135

7   *Attorneys for Petitioner*

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BALLARD SPAHR LLP
1980 FESTIVAL PLAZA DRIVE, SUITE 900
LAS VEGAS, NEVADA 89135
(702) 471-7000 FAX (702) 471-7070

5

From: Greg Richmond [mailto:gregr@qualitycharters.org]
Sent: Tuesday, September 22, 2015 4:23 PM
To: Nagourney Jennifer
Subject: RE: Conference Fees & Consulting Opportunities

Hello Jen,

I'm glad there is interest in Delaware in coming to our conference. We are pretty stingy on registration waivers or reductions because we already lose money on conference as is. Is the registration dollar amount or is it out-of-state travel itself which is the problem? If it is the latter, we might be able to invoice you in more creative ways (e.g. through membership dues) that don't show up as invoices for out-of-state travel.

Greg

Greg Richmond, President & CEO
National Association of Charter School Authorizers
Direct: 312.376.2322 | www.qualitycharters.org

2015 NACSA Leadership Conference
COLORADO | October 19-22, 2015 | Register Today!

From: Nagourney Jennifer [mailto:Jennifer.Nagourney@doe.k12.de.us]
Sent: Monday, September 21, 2015 9:37 AM
To: Greg Richmond
Subject: Conference Fees & Consulting Opportunities

Hello, Greg! How are you? I hope everyone at NACSA is happy, healthy, and enjoying a beautiful start to fall in Chicago!

I'm have a few questions, and I'm hoping you can point me in the right direction.

First, I am wondering if there is someone I can speak to at NACSA about the possibility of a registration fee waiver or reduction for two Delaware Department of Education attendees. The state has taken a hard line against all out of state travel expenses, and we are actively looking for grant funding from Delaware foundations. Any assistance would be very greatly appreciated!

Second, I am wondering who I could speak to at NACSA about potential consulting opportunities in the field, either through NACSA or working directly with organizations. As you know, I am actively looking expand my expertise and work experience in other locations, and I would value any constructive advice that the NACSA all-star team could offer.

Many thanks,
Jen

Jennifer M. Nagourney, J.D.
Executive Director, Charter School Office
Delaware Department of Education
401 Federal Street, Suite #2
Dover, DE 19901-3639
302.735.4020 (T) 302.739.4483 (F)

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BLUUM
LET LEARNING GROW

WHO WE ARE ˅   OUR WORK ˅   CSP GRANT ˅   PARENTS ˅   FELLOWSHIPS ˅   NEWS ˅   CONTACT
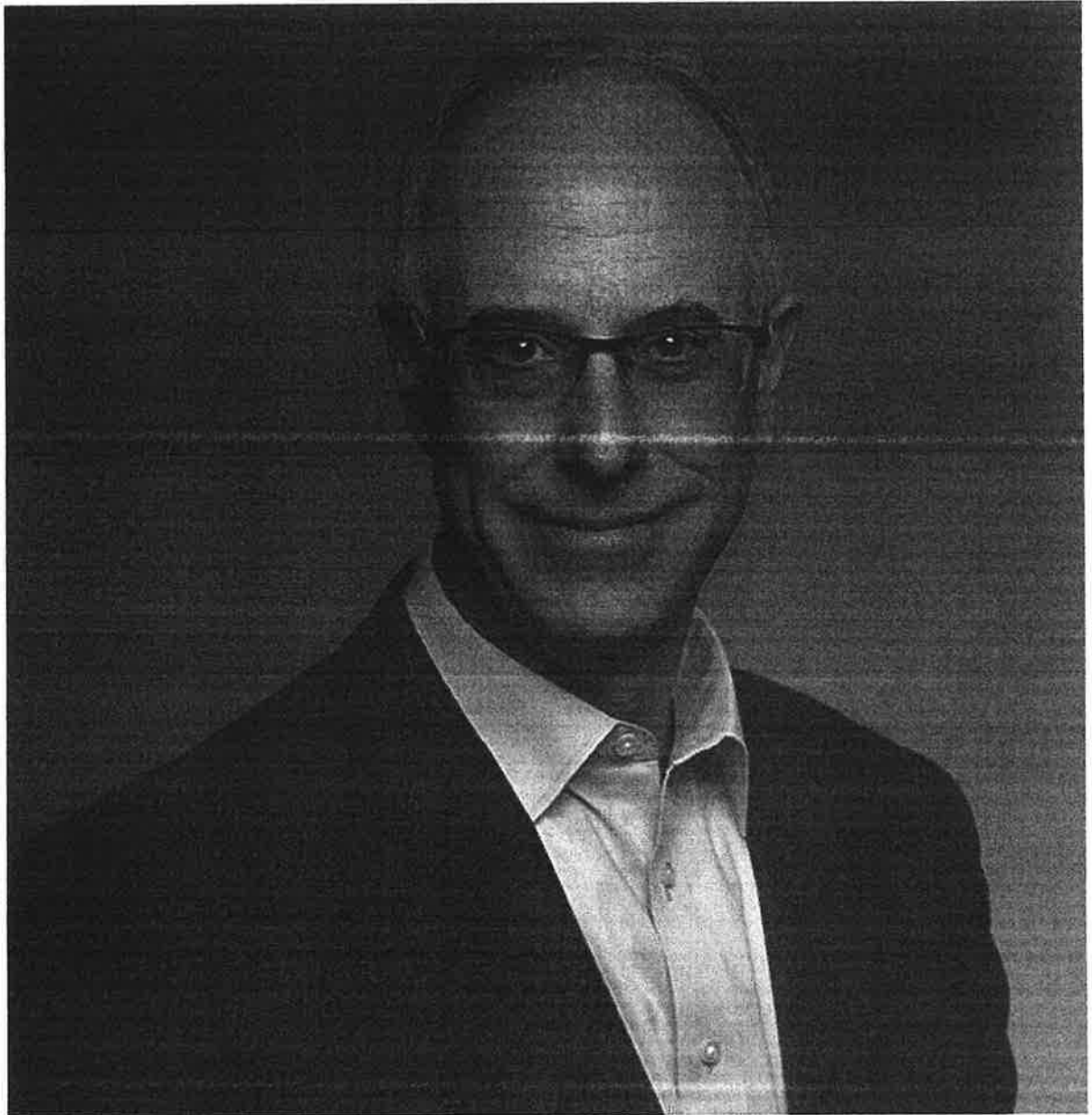
BLUUM WELCOMES GREG RICHMOND, VETERAN EDUCATION LEADER

MARCH 31, 2020

Press Release 3/31/2020 | DOWNLOAD

f y in g⁺

EXHIBIT "C"

PPGA   **TAB 8 Page 24**

BLUUM
LET LEARNING GROW

WHO WE ARE ⌄   OUR WORK ⌄   CSP GRANT ⌄   PARENTS ⌄   FELLOWSHIPS ⌄   NEWS ⌄   CONTACT

this period of unparalleled challenge to public education and to the learning and well-being of our families and children."

Richmond is the founder of the National Association of Charter School Authorizers and served as its Chief Executiv Officer from 2005 through 2019. Richmond stated, "When I stepped away from NACSA, I said I wanted to work mor closely with educators and communities who are starting new schools. I am thrilled to find that opportunity with Bluum. Idaho is a fast-growing state and it continues to have a strong, growing charter school community. I am looking forward to joining it."

Ryan added, "I have worked closely with Greg for years and I appreciate his integrity, his thoughtfulness and his commitment to children and families first. I have found his calmness in times of craziness reassuring. He kept his head while others struggled to do so. Greg knows how to get things done."

At Bluum, Richmond will have broad responsibilities leading efforts to grow the number of quality schools, the number of students enrolled in those schools, and the number of graduates prepared for success in life.

Richmond was inducted into the National Charter School Hall of Fame in 2017 and is a past board member of the National Alliance for Pubic Charter Schools, Equitable Facilities Fund, and Facilities Investment Fund. He is a Pahara Aspen Fellow and a Senior Fellow at Future Ed, a Georgetown University think tank.

POSTED IN: IN THE NEWS , PRESS RELE

. ACCESSIBILITY STATEMENT

BLUUM HIRES CHIEF OFFICER FOR GROWTH AND STRATEGY

Devin Bodkin • 03/31/2020

(Updated Thursday, April 2, at 9:35 a.m. with reaction from another charter school support group.)

Idaho charter support group Bluum (https://www.bluum.org) has hired the former founder and CEO of a national nonprofit devoted to improving authorizing practices for charter schools.

Greg Richmond, formerly of the Chicago-based National Association of Charter School Authorizers (https://www.qualitycharters.org), joins Bluum as chief officer for growth and strategy, Bluum announced (https://www.bluum.org/bluum-welcomes-greg-richmond-veteran-education-leader/) Tuesday.

Greg Richmond

"We are incredibly fortunate to add Greg to our team during this period of unparalleled challenge to public education and to the learning and well-being of our families and children," Bluum CEO Terry Ryan said.

Richmond will lead Bluum's efforts to "grow the number of quality schools in Idaho, the number of students enrolled in those schools, and the number of graduates prepared for success in life," Ryan said.

Richmond spent 14 years at NACSA, from 2005 to 2019. He and his organization are familiar with Idaho's growing charter sector.

- In January, Richmond surfaced as a finalist (https://www.idahoednews.org/news/charter-commission-narrows-search-for-new-director/) vying to replace the outgoing director of the Idaho Public Charter School Commission (https://chartercommission.idaho.gov), the authorizing body that oversees most of the state's public charters. The commission selected one of its own (https://www.idahoednews.org/news/charter-commission-names-new-director/).
- NACSA last year suggested the commission develop higher standards for approving charters (https://www.idahoednews.org/news/national-group-recommends-higher-standards-for-idaho-charters/).

NACSA's presence in Idaho, and Richmond's planned move to Boise, sparked mixed reactions in Idaho's charter world. The Coalition of Idaho Charter School Families (http://www.idchartercoalition.org/about-us), which claims to represent thousands of charter advocates across the state, lambasted Richmond's hiring on its Facebook page (https://www.facebook.com/idahopublicedoptions/).

Coalition president Tom Leclaire said he was "deeply disturbed" by the news.

Richmond said Idaho's growing charter sector fueled his decision.

"When I stepped away from NACSA, I said I wanted to work more closely with educators and communities who are starting new schools," Richmond said in a statement. "I am thrilled to find that opportunity with Bluum."

Richmond referenced Idaho's growing charter sector. Bluum is a key part of the growth, overseeing the dissemination of millions of federal and private dollars (https://www.idahoednews.org/news/bsu-is-tracking-student-achievement-at-several-idaho-charters/) earmarked for charter expansion and startups. Bluum has spearheaded the creation of more than 6,000 new charter seats in the state since 2014 and plans to add thousands more in the coming years.

Disclosure: Bluum and Idaho Education News are both funded on grants from the J.A. and Kathryn Albertson Family Foundation.

ABOUT DEVIN BODKIN

Reporter Devin Bodkin covers education issues in East Idaho. He is a former high school English teacher who specializes in stories about charter schools and educating students who live in poverty. Devin co-hosts "Beyond the Books" online news segments in conjunction with EastIdahoNews.com. He is a 2019 Solutions Journalism Network fellow. Follow Devin on Twitter **@dsbodkin (https://twitter.com/dsbodkin)**. He can be reached by email at **dbodkin@idahoednews.org (mailto:dbodkin@idahoednews.org)**.

Read more stories by Devin Bodkin » (https://www.idahoednews.org /author/dbodkin/)

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"I think we will meet the criteria for Stage One unless something significant happens going forward," Gov. Brad Little said.

April 11, 2019

SUBJECT
PCSC Education: NACSA Authorizer Evaluation Report

APPLICABLE STATUTE, RULE, OR POLICY
N/A

BACKGROUND
In late 2018, the National Association of Charter School Authorizers (NACSA) performed a formative evaluation of the PCSC. NACSA representatives reviewed extensive documentation and conducted a site visit in order to evaluate the PCSC's application decision making, performance management systems, performance-based accountability, support of school autonomy, and organizational capacity.

NACSA's findings were guided by the Principles and Standards for Quality Charter School Authorizing and the 2018 Quality Practice Project.

DISCUSSION
NACSA representatives Dr. Chastity McFarlan and Brenna Copeland will present findings from their Authorizer Evaluation Report.

IMPACT
Information item only.

STAFF COMMENTS AND RECOMMENDATIONS
Staff is already working to implement some of the report's recommendations, in accordance with previously established PCSC priorities. Additional staff recommendations based on the report will be presented at a future meeting.

COMMISSION ACTION
Any action would be at the discretion of the PCSC.

EXHIBIT "D"

nacsa
NATIONAL ASSOCIATION OF
CHARTER SCHOOL AUTHORIZERS

MARCH 15, 2019

NACSA AUTHORIZER EVALUATION REPORT

_____

IDAHO PUBLIC CHARTER SCHOOL COMMISSION (IDAHO PCSC)
Authorizer

ALAN REED
Commission Chair

TAMARA BAYSINGER
Director

ED.gov   NATIONAL CHARTER SCHOOL RESOURCE CENTER AT SAFAL PARTNERS

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CONTENTS

ABOUT THE EVALUATION

PURPOSE AND PROCESS

This evaluation is designed to provide the authorizer with a reflective, formative analysis of its primary strengths, priorities for improvement, and recommendations for moving forward. Through this evaluation, NACSA hopes to provide the authorizer with critical feedback that will accelerate the adoption of practices that will lead to stronger outcomes for students and communities.

This evaluation is based on NACSA's _Principles & Standards for Quality Charter School Authorizing (Principles & Standards)_, which is recognized as the leading framework for authorizing best practices, having been written explicitly and implicitly into numerous state charter school laws. Consistent with NACSA's _Principles & Standards for Quality Charter School Authorizing_, this evaluation assesses the authorizer's core responsibilities in the following areas:

1. Organizational Capacity and Commitment;
2. Applications and School Openings;
3. Monitoring and Intervention; and
4. Renewal, Expansion, and Closure.

This evaluation is also guided by key findings from NACSA's Quality Practice Project (QPP), an initiative that seeks to build a stronger evidence base between authorizing practices and student outcomes. Through this research, NACSA studied the practices of authorizers with a range of performance profiles and identified certain practices and perspectives that correlate with strong student and public-interest outcomes. The key findings from this initiative, which are incorporated into this evaluation, include:

*   _Commitment._ Great authorizers reflect their institution's commitment to quality authorizing. Authorizing is visible, championed, and adequately resourced, rather than buried in a bureaucracy. The people responsible for day-to-day authorizing functions have influence over decision-making.

*   _Leadership._ Great authorizers are dedicated to a mission of giving more children access to better schools through the proactive creation and replication of high-quality charter schools and the closure of academically low-performing charter schools.

*   _Judgment._ Great authorizers make decisions based on what will drive student outcomes, not based on checking boxes or on personal beliefs.

This evaluation is the culmination of a process, which included an extensive document review, data analysis, surveys, multiple conversations and discussions with the authorizing staff, and a two-day site visit, during which the evaluation team interviewed authorizing staff, leadership, board members, and charter school leaders.

ABOUT NACSA

NACSA believes that authorizers are responsible for ensuring that charter schools are good schools for children and the public. As an independent voice for quality charter school authorizing, NACSA uses data and evidence to encourage smart charter school growth. NACSA works with authorizers and partners to create the gold standard for authorizing and build authorizers' capacity to make informed decisions. NACSA also provides research and information that help policymakers and advocates move past the rhetoric to make evidence-based policy decisions. More at https://www.qualitycharters.org/.

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ABOUT IDAHO PUBLIC CHARTER SCHOOL COMMISSION (IDAHO PCSC)

IDAHO PCSC PORTFOLIO COMPARED TO STATE SCHOOLS (2017)

|	IDAHO PCSC SCHOOLS	STATE
No. of Schools	41	706
Student Enrollment	16,611	280,413
Percent of Students with Disabilities	8.9%	9.6%
Percent of Students Qualifying for Free/Reduced Lunch	26.7%	48.7%
Percent of English Learners	1.5%	5.6%

Source: Idaho Department of Education: http://www.sde.idaho.gov/finance/#attendance

CHARTER SCHOOL OPENINGS AND CLOSINGS OVER TIME
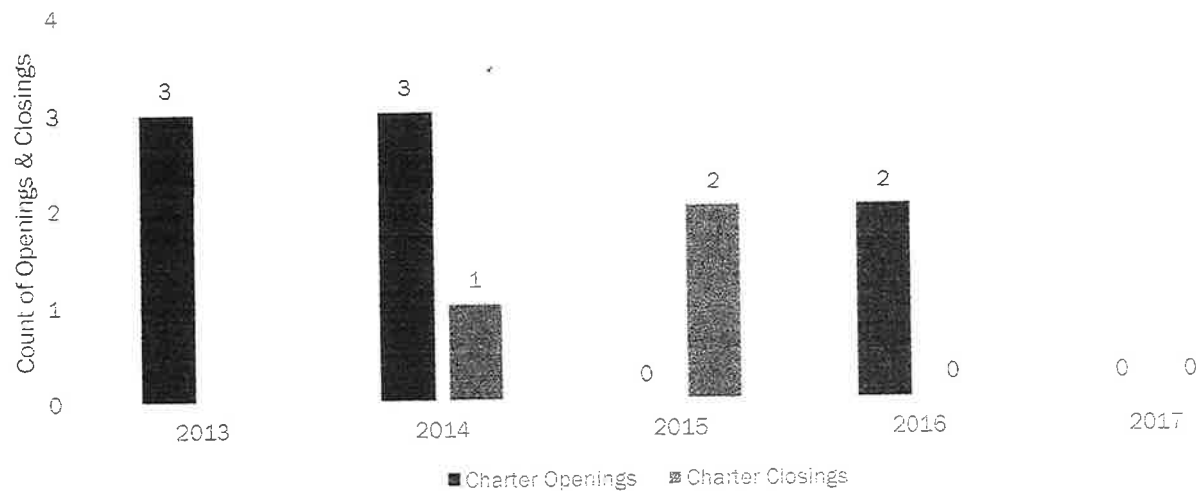
Source: National Alliance for Public Charter School Database

CHARTER SCHOOL PERFORMANCE

Number of Schools Meeting Student Growth Targets¹ in English Language Arts and Math: 2017
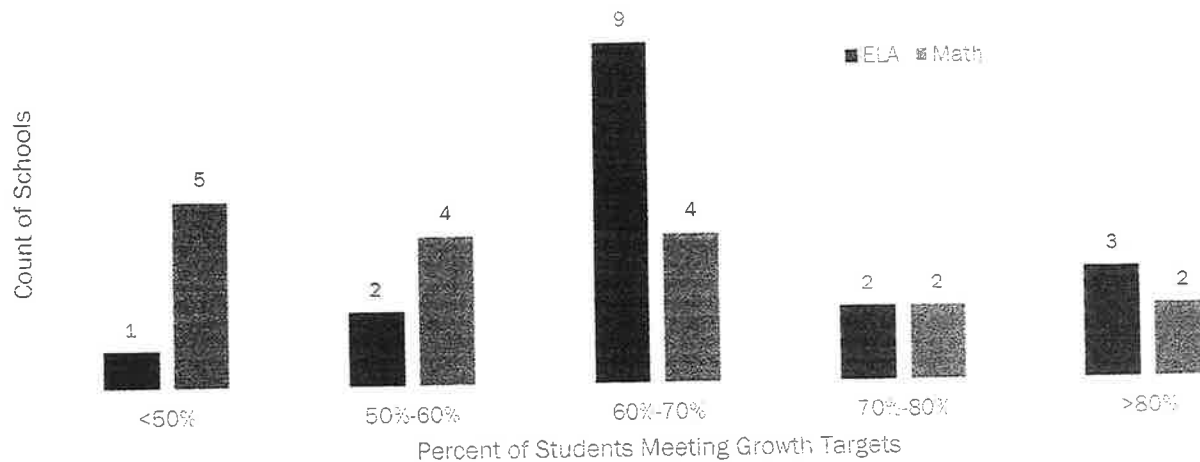
Source: Idaho State Department of Education (2018 Accountability Data: Academic Growth). Downloaded 11/9/2018 from http://www.sde.idaho.gov/assessment/accountability/index.html
Note: Data are only available for schools serving K-8 populations. ELA = English/Language Arts
How to Read This Figure: Each bar represents the number of K-8 schools meeting student growth targets on the Idaho Standards Achievement Test (ISAT) as established by the Idaho State Department of Education. For example, in ELA, one school had 50 percent or fewer of its students meet growth targets and 5 schools had 50 percent or fewer meet targets in Math. On the other end of the distribution, three schools had 80 percent or more of its students meet academic growth targets for ELA and two schools had 80 percent or more meet targets for Math.

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¹ "To calculate a student's academic growth target, a student's scale score from the prior year will serve as a baseline. Next, the score that the student needs to reach Level 3 (Proficient) on the statewide assessment **three years in the future** is identified and called a target scale score. A simple subtraction of the baseline score from the target scale score results in the necessary growth needed to meet proficiency in three years. That number is then divided by three, providing an annual growth target. The change between a student's 2017 and 2018 ISAT scale score is compared against his or her annual growth target. If the student's actual growth was greater than or equal to the annual growth target, the student is "on track." (Idaho State Department of Education, Academic Growth Description, 2018)

Number of Schools Above and Below the State Average in Proficiency (or Above) by Subject and Level: 2017
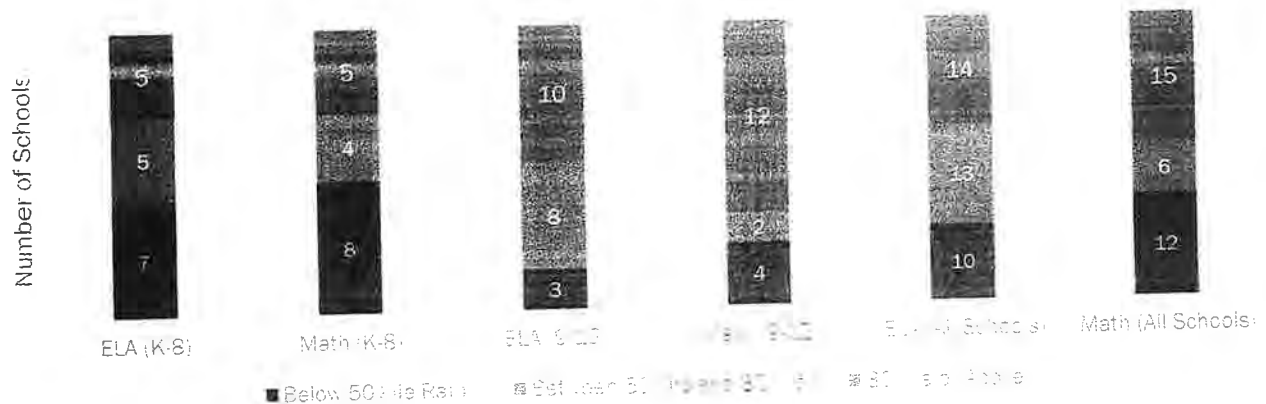
Source: Idaho State Department of Education (2018 Accountability Data: Academic Achievement). Downloaded 11/9/2018 from http://www.sde.idaho.gov/assessment/accountability/index.html

Note: For high schools, Idaho also includes a separate English/Language Arts and Math proficiency (or above) percentile rank for alternative high schools. The data represent four such schools overseen by the Idaho PCSC and are included in this analysis. ELA = English/Language Arts

How to Read This Figure: Each bar represents the number of schools having a proficiency percentage that ranks the school below the 50th percentile, between the 50th percentile and 80th percentile, and above the 80th percentile. For example, for schools serving grades K-8 in ELA, seven schools proficiency percentage ranked them below the 50th percentile, five ranked between the 50th percentile and 80th percentile, and five ranked higher than the 80th percentile. That also means that 10 schools (5+5) ranked above the 50th percentile.

Number of Schools with Larger and Smaller Gaps in Proficiency Compared to the State for Economically Disadvantaged and Non-Economically Disadvantaged Students: 2017
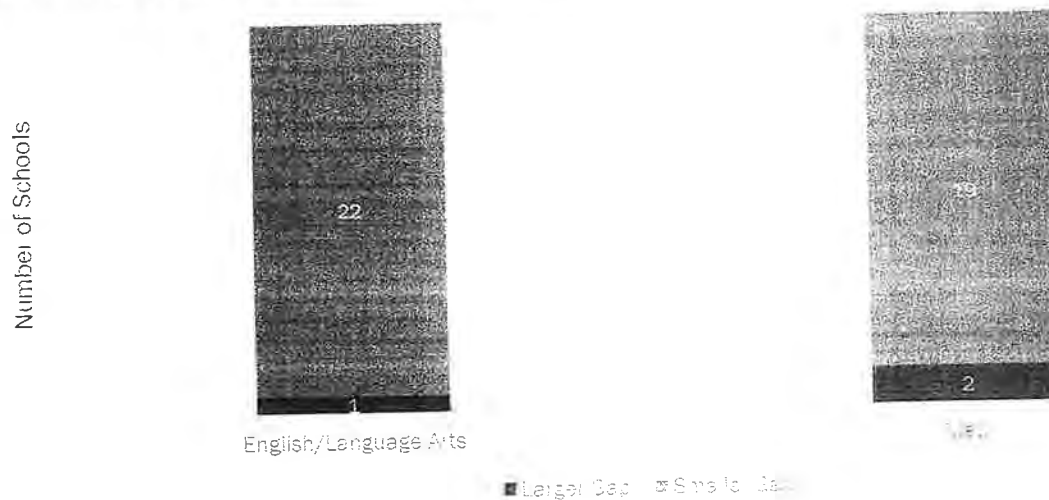
Source: Idaho State Department of Education (2018 Accountability Data: Academic Achievement). Downloaded 11/9/2018 from http://www.sde.idaho.gov/assessment/accountability/index.html

How to Read This Figure: The proficiency gap is the difference between the percent of economically disadvantaged and non-economic disadvantaged students scoring proficient (or above) on the state accountability assessment. For 2017 for the state of Idaho, that gap in ELA was 25 percentage points (65 percent proficient for non-economically disadvantaged students and 41 percent for disadvantaged students), and in Math was 24 percentage points (55.3 percent and 31.4 percent, respectively). For example, in Math there were two Idaho PCSC schools with a proficiency gap larger than the state's (i.e. 24 percentage points) and 19 schools with a gap smaller than the state's.

Count of Schools at Multiple Graduation Rate Percentages: 2017
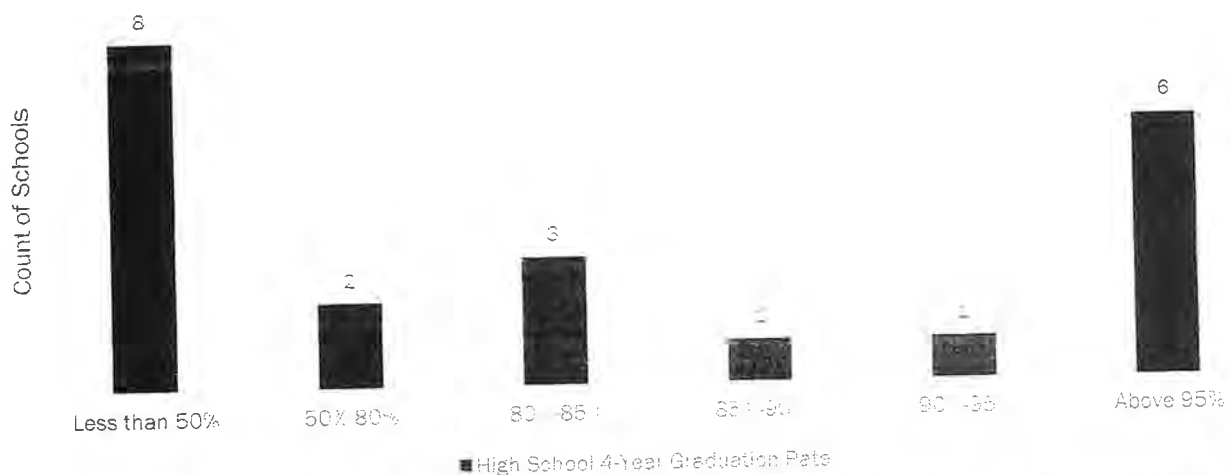
Source: Idaho State Department of Education (2018 Accountability Data: Graduation Rate). Downloaded 11/9/2018 from http://www.sde.idaho.gov/assessment/accountability/index.html
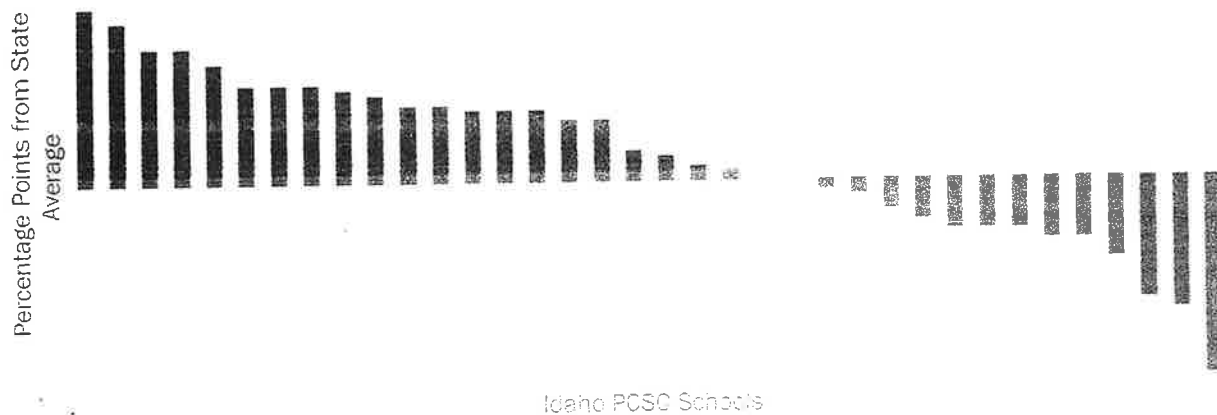How to Read This Figure: Each bar represents the number of high schools within a graduation rate band. For example, eight high schools had less than a 50 percent 4-year adjusted graduation rate as defined by the Idaho State Department of Education. For context, a 4-year adjusted graduation rate of 89.0 percent would be considered at the 50th percentile (i.e. state average). The greater of the typical and alternative high school graduate rate was used in this analysis.

Idaho PCSC's Analyses[2] of Schools Above and Below the State Average in Proficiency in ELA: 2017
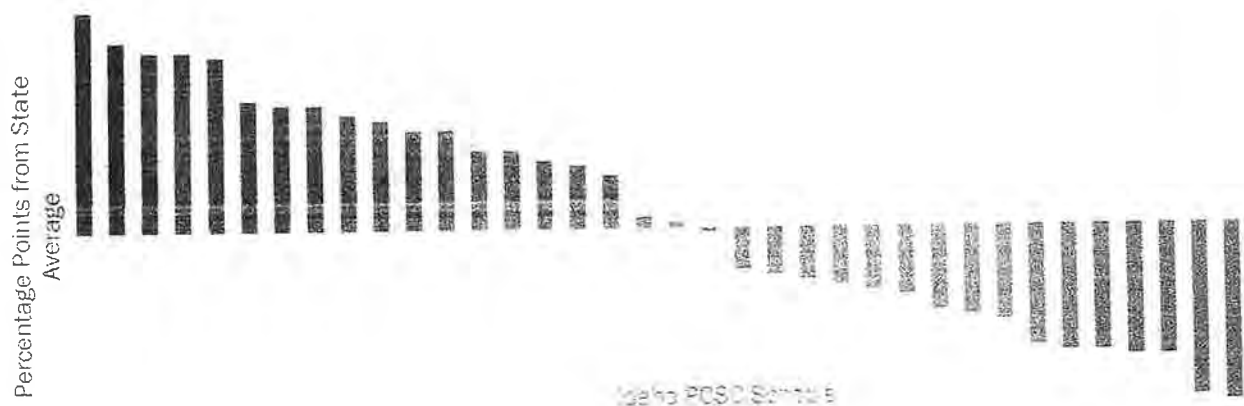
[2] Idaho PCSC uses stricter inclusion criteria compared to Idaho State Department of Education when analyzing student performance. In contrast to the state, Idaho PCSC excludes alternate ISAT data, only includes students who were continuously enrolled from early in the school year through the test window, and conducts state comparisons at the grade level rather than at the school level. For this reason, we have included both the state's and the authorizer's reports of Idaho PCSC's portfolio performance.

NACSA AUTHORIZER EVALUATION REPORT: IDAHO PUBLIC CHARTER SCHOOL COMMISSION (IDAHO PCSC), MARCH 15, 2019

Idaho PCSC's Analyses of Schools Above and Below the State Average in Proficiency in Math: 2017

Source: Idaho Public Charter School Commission (2017 Annual Report). Downloaded 2/13/2019 from
https://chartercommission.idaho.gov/pcsc-schools/pcsc-annual-report/

Note: Alternative schools are not included in this analysis.

How to Read This Figure: Each bar represents one school's difference in performance compared to the state average for the enrolled. Positive (blue) bars indicate higher performance than the state; negative (gray) bars indicate lower performance than the state.

EXECUTIVE SUMMARY

The Idaho Public Charter School Commission (Idaho PCSC) oversees a portfolio of 41 charter schools, including four schools that opened in the 2018-19 school year. The Idaho PCSC is an independent statewide commission composed of seven members appointed by the governor, speaker, or pro tempore. There are four full-time staff members focused on the charter authorizing work of the commission; these staff members serve within the Idaho State Board of Education office. Idaho PCSC shows diligence and intentionality in its academic analyses (e.g., conducting grade-by-grade comparisons; only including in the analyses students enrolled the entire year) to gather an accurate representation of portfolio performance, even though this results in lower proficiency rates than the state reports Idaho PCSC has earned. Based on Idaho PCSC's analyses, in 2017, just over half of its charter schools (54 percent) were meeting or exceeding performance expectations on the academic performance framework revised in 2016. While all four of Idaho PCSC's alternative schools posted performance that trended above state averages for alternative school performance, most of its virtual schools underperformed the state average.

Since NACSA's 2014 Authorizer Evaluation, Idaho PCSC has made several commendable improvements to its policies and practices that should continue to manifest in better charter school outcomes and portfolio performance in the coming years. Idaho PCSC has improved its performance frameworks, designed and implemented a charter renewal process, overhauled its new school application process, and revised its policies and procedures manual substantially. Idaho PCSC issues thorough annual reports to each school in the portfolio that summarize their performance against all three (academic, financial, and organizational) performance frameworks. These reports help schools understand how they are performing and form the basis for a body of evidence to consider in charter renewal. While there are opportunities to further improve Idaho PCSC practices discussed below, NACSA commends the authorizer for a clear commitment to continuous improvement, transparency, and strong support for charter schools in the state.

Interviews with school leaders and education stakeholders make evident that the staff at Idaho PCSC are well-respected and work hard to communicate clear expectations. The staff support schools that are struggling by working to ensure that schools understand expectations, laws, and regulations through meetings and written correspondence. Staff sometimes suggest resources or support organizations but do not overstep appropriate school autonomies. The strong positive relationship between Idaho PCSC and the schools it authorizes is further evidenced by the fact that several charter schools have sought to transfer into the Idaho PCSC portfolio over the past few years.

To improve portfolio performance over time, Idaho PCSC should apply rigorous quality standards in its new school application process. Having approved 100 percent of the new school applications that made their way through the process in the last two years, the Idaho PCSC's approval rate is much higher than the national average of 35 percent. NACSA encourages commissioners and staff to rigorously evaluate new school applicants and only approve those applicants that are fully credentialed, qualified, and prepared to open high-quality schools.

Almost half of schools in Idaho PCSC's portfolio have failed to meet overall performance expectations on the 2017 academic performance framework, suggesting that overall portfolio performance still needs improvement. Idaho PCSC has adopted clear policy language that schools should be renewed based on past performance, not promises of future improvement; the next step for Idaho PCSC is to implement this policy consistently in its recommendations and decision-making. Charter renewals should not be offered to schools repeatedly falling far below academic performance expectations. When offering conditional renewals, Idaho PCSC should evaluate the conditions in a timely manner (e.g., after one or two years of the new charter contract) and only utilize conditions in cases in which schools are reasonably close to meeting performance expectations.

Finally, the Idaho PCSC should develop a clear revocation policy and set of procedures to ensure that students do not languish in low-performing schools. Statute indicates that each authorizer should articulate a clear revocation process. Given that all charter contracts must be for a full five years in Idaho, it is important for Idaho PCSC to articulate and implement revocation processes that protect the interests of students.

SUMMARY OF RECOMMENDATIONS

Section 1: Organizational Commitment and Capacity

1.1. Demonstrate a commitment to high-quality authorizing by implementing adopted policies with fidelity and holding schools to rigorous performance expectations.

1.2. Clarify and expand the current annual planning and goal-setting process to ensure that Idaho PCSC staff and commissioners are setting specific, measurable, attainable, relevant, and time-bound (SMART) goals each year as part of its commitment to continuous improvement.

Section 2: Application and School Opening

2.1. Enforce high expectations by only approving petitions from boards, school leaders, and founding teams that have sufficient capacity to oversee and run high-quality schools.

2.2. Apply clear quality criteria to evaluate new school petitions.

2.3. Include external evaluators in the application review process.

Section 3: School Monitoring and Intervention

3.1. Develop and implement a systematic process to evaluate schools on the operational framework that also leverages the renewal site visit.

3.2. Clarify intervention processes to stipulate triggers for intervention, Idaho PCSC procedural steps, and expectations for school responses.

Section 4: Renewal, Expansion, and Closure

4.1. Renew only schools that have met the standards for academic performance laid out in the accountability frameworks and embedded in the charter performance certificates.

4.2. Clarify and consistently enforce financial accountability policies.

4.3. Apply renewal conditions in a timely manner and amend Idaho PCSC policies and procedures to ensure that performance expectations are enforced for each year of the charter term.

4.4. Establish a clear revocation policy and process to ensure that schools can be held accountable to performance expectations in a timely manner.

STRENGTHS AND SPOTLIGHTS

Organizational Capacity and Commitment

A quality authorizer engages in chartering as a means to foster excellent schools that meet identified needs, clearly prioritizes a commitment to excellence in education and in authorizing practices, and creates organizational structures and commits the human and financial resources necessary to conduct its authorizing duties effectively and efficiently.

Reference: NACSA's Principles & Standards for Quality Charter School Authorizing, *Standard 1: Agency Commitment and Capacity; and* Leadership, Commitment, Judgment: Elements of Successful Charter School Authorizing: Findings from the Quality Practice Project, *pgs. 10 – 15.*

- Idaho Public Charter School Commission (Idaho PCSC) maintains policies that are well-aligned to NACSA's *Principles & Standards for Quality Charter School Authorizing*. Specifically, Idaho PCSC has a policies and procedures manual covering topics, such as new school petitioning processes, contract amendments, ongoing monitoring, and charter renewal. Idaho PCSC posts the manual publicly, which transparently articulates Idaho PCSC's roles and duties. The policies regularly cite state statute and Idaho PCSC updates them in a timely manner to reflect changes in statute.

- The commissioners on Idaho PCSC bring diverse skills and expertise, including a number who have been directly involved in charter school start-up. Many of the commissioners have direct professional experience in K-12 or higher education and several have served on local school boards or in elected roles within the state legislature. The commissioners adhere to a conflict of interest policy that applies to state employees and elected officials, as evidenced by meeting minutes that denote when commissioners have recused themselves from specific votes due to conflicts with applicant or renewal schools.

- Professional development is a priority for both staff and commissioners at Idaho PCSC, reflecting a commitment to continuous improvement in policy and practice. The director of the office, Tamara Baysinger, recently completed NACSA's Leaders' Program and has been a regular attendee at professional conferences related to charter authorizing and education reform for many years. Idaho PCSC's budget includes dedicated funds for professional development and memberships, and these funds are utilized appropriately as evidenced by the commissioner reports at the December 2018 regular meeting. At this meeting, several commissioners reported key takeaways and learnings from attending recent NACSA- and ExcelinEd-hosted conferences.

- Idaho PCSC has expanded its staff in recent years to provide oversight to its 41 charter schools. In addition to the director, there are two full-time program managers and a full-time administrative assistant, which represents a 1.5x full-time equivalent increase since the 2014 Authorizer Evaluation. While there is no specific recommended staffing ratio for authorizers, the current ratio of approximately one full-time equivalent per 10 schools is close to some other statewide authorizers; for example, the Massachusetts Board of Elementary and Secondary Education employs a staff of one full-time equivalent per eight schools authorized as of 2015-16. Idaho PCSC also contracts with education practitioners and experts to conduct site visits as part of the charter renewal process. The funding to cover this contracted support was a recent addition to the Idaho PCSC budget from the Idaho legislature. The seven appointed commissioners of the Idaho PCSC make all formal decisions on behalf of the Idaho PCSC.

Applications and School Opening

A quality authorizer implements a comprehensive application process that includes clear application questions and guidance; follows fair, transparent procedures and rigorous criteria; includes an interview of all qualified applicants; and grants charters only to applications that demonstrate strong capacity to establish and operate quality schools.

A quality authorizer uses the pre-opening process to build relationships, set expectations, and provide technical assistance to schools, and does not let schools open that have not demonstrated their readiness to serve students.

Reference: NACSA's Principles & Standards for Quality Charter School Authorizing, Standard 2: Application Process & Decision Making; and Leadership, Commitment, Judgment: Elements of Successful Charter School Authorizing: Findings from the Quality Practice Project, pgs. 16 – 20.

- Idaho PCSC supports schools through the new school petition process by providing applicants with written feedback and then allowing applicants to submit revisions to their petitions. In the Spring 2018 petition cycle, Idaho PCSC provided clear written feedback to three schools; all three schools exercised their option to revise their petitions, resubmitted within the evaluation window, and Idaho PCSC ultimately approved each petition. This feedback-and-revision process is consistent with recommended practices identified in NACSA's Quality Practices Project, which states that high-quality authorizers have "a multi-stage process in which applicants are provided feedback and are permitted to respond to feedback during the process."

- To further support applicants in developing their new school applications, Idaho PCSC provides helpful guidance in their new school petition process that goes beyond a simple checklist of required items. Rather than formalizing a long list of questions to which an applicant must respond, the guidance document explains statutory requirements and provides suggested considerations in developing a new school petition. The guidance document provides tips on how best to form a good mission statement, how to describe the educational program, the importance of boards, and the need to keep in mind "Founders Syndrome" (in which a founder does not want to relinquish the day-to-day work of operating the school to staff, resulting in micromanaging the administrator or even teachers), etc. The guidance document suggests that the applicant consider enlisting the help of qualified individuals who understand Idaho public school funding in creating a balanced budget for the new school. Helping applicants locate support resources and critical information is an important best practice highlighted in NACSA's Quality Practices Project.

☆ PRACTICE SPOTLIGHT

Idaho PCSC's pre-opening process supports schools significantly. The process aligns to statutory expectations for standard conditions that a school must satisfy prior to opening. It creates a transparent mechanism for Idaho PCSC to track items, such as securing the facility, obtaining a certificate of occupancy, conducting fair and transparent enrollment lotteries, and establishing health and safety protocols. In interviews, school leaders reported that the pre-opening support was very helpful, especially regarding the availability of Idaho PCSC staff members to meet regularly with school staff and focus the meetings on the particular needs of individual schools.

The robust pre-opening process provides support to schools and establishes accountability around the standard pre-opening conditions. Central to Idaho PCSC's pre-opening support is a detailed spreadsheet of tasks for a board and school leadership to complete during the planning year. The spreadsheet organizes tasks into categories, such as finance, governance, facility, technology, and transportation. Additionally, over the course of the pre-opening year, Idaho PCSC staff members conduct at least five meetings and one on-site school visit to determine the extent to which the school is on track to open successfully.

School Monitoring and Intervention

A quality authorizer defines and incorporates into the charter contract, clear, measurable, and attainable academic, financial, and organizational performance standards and targets that the school must meet as a condition of renewal.

A quality authorizer conducts contract oversight that competently evaluates performance and monitors compliance; ensures schools' legally entitled autonomy; protects student rights; informs intervention, revocation, and renewal decisions; and provides annual public reports on school performance.

Reference: NACSA's <u>Principles & Standards for Quality Charter School Authorizing</u>, Standard 3: Performance Contracting and Standard 4: Ongoing Oversight and Evaluation; and <u>Leadership, Commitment, Judgment: Elements of Successful Charter School Authorizing: Findings from the Quality Practice Project</u>, pgs. 13 – 15.

- Idaho PCSC provides helpful support to charter leaders who join their schools after a petition has been granted or after a school has opened. The school leader guidance document contains succinct and clear information to help new school leaders understand the landscape of regulatory entities involved with charters, as well as various ongoing monitoring processes and performance expectations. The document explains how Idaho PCSC will notify schools of academic, operational, and financial concerns. It provides a helpful summary of the responsibilities of the State Board of Education, the State Department of Education, and the Public Charter School Commission, and includes a timeline of reports that schools must submit. The document also includes a summary of what Idaho PCSC measures and includes in the Annual Performance Reports, with helpful examples of how to interpret academic performance measures. Idaho PCSC makes this document available on its website and shares it with newly hired principals joining schools in the portfolio.

- The charter contract, called the performance certificate, contains many components that make for a clear relationship and understanding between Idaho PCSC and the charter school. The performance certificate template includes language regarding Idaho PCSC's ability to non-renew or revoke a charter if the school does not meet academic, organizational, or financial performance expectations. The performance certificate does not contain any provisions or unusual language that infringe on school autonomy. While the performance certificate is strong overall, Idaho PCSC could further strengthen it by specifying what kinds of programmatic or operational changes rise to the level of being "material" and thus requiring authorizer approval.

- Idaho PCSC creates annual reports that provide consistent and actionable information to schools. The annual report explicitly summarizes the school's annual performance against the three key performance frameworks: academic, operational, and financial. The annual report contains indicators, measures, and metrics for student academic proficiency, student academic growth, post-secondary readiness (for high schools), and board performance and stewardship. In interviews, school leaders expressed that information in the report is helpful and informs their practices, especially regarding school operations, finances, and board practices. In a recent survey of school leaders, 88 percent of respondents (15 of 17) agreed that Idaho PCSC evaluates schools regularly. Notably, at the time of NACSA's previous evaluation in 2014, Idaho PCSC had planned – but had not yet developed – the current annual report format aligned to recent statutory requirements.

⭐ **PRACTICE SPOTLIGHT**

School closure is one of the more difficult but also impactful parts of charter authorizing. Ideally, the closure process proceeds respectfully and collaboratively between the school's staff, board of directors, and the authorizer. In practice, tense conversations and conflict can inhibit an orderly closure process. For this reason, NACSA recommends that authorizers maintain a "detailed closure protocol that ensures timely notification to parents; orderly transition of students and student records to new schools; and disposition of school funds, property, and assets in accordance with law" (*Principles and Standards*, pg. 21).

Idaho PCSC has developed a detailed closure protocol that supports these critical steps and could serve as a model to other authorizers. The protocol was developed in careful consideration of best practice guidance from NACSA and exemplar materials from other authorizers, such as the State University of New York and the Colorado Charter School Institute. There is a clear conceptual timeline that identifies student, parent, and staff notification as a first step in the process. A detailed table outlines specific tasks and assigns responsible parties to ensure that tasks are carried out. The table maintains space to note deadlines and status throughout the process as a tracking and documentation tool. The level of detail and clarity in the document is exemplary for structuring a transparent and orderly closure process.

Renewal, Expansion, and Closure

A quality authorizer designs and implements a transparent and rigorous process that uses comprehensive academic, financial, and operational performance data to make merit-based renewal decisions and revokes charters when necessary to protect student and public interests.

A quality authorizer encourages high-performing charter schools to expand through a transparent process based on clear eligibility standards and historical performance records.

Reference: NACSA's Principles & Standards for Quality Charter School Authorizing, *Standard 5: Revocation and Renewal Decision Making; and* Leadership, Commitment, Judgment: Elements of Successful Charter School Authorizing: Findings from the Quality Practice Project, *pgs. 16 – 17.*

- As part of its commitment to transparency, Idaho PCSC provides strong guidance and support to schools throughout the renewal process. The "Performance Certificate Renewal Process" guidance document outlines a multi-year timeline connecting annual performance reports to the renewal process occurring in the final year of charter contract. The "Reporting Auxiliary Data at Renewal" guidance document explains how schools can submit additional academic performance data as part of the renewal process and provides guidance about what types of data are most helpful. To ensure that schools understand their prospects for renewal, as well as the process in general, Idaho PCSC staff meet with each charter school personally in the year prior to its renewal to review school performance and discuss the process.

- The adopted policies and procedures for charter renewal demonstrate Idaho PCSC's intention to make outcomes-based renewal decisions. For example, the policies indicate that "renewal decisions shall be based on past outcomes, not on the promise of future improvement." This language is consistent with NACSA's *Principles & Standards* for charter authorizing and makes clear the expectation that school outcomes are central to renewal decision-making. While the articulated policies are strong, the recommendations that follow in this document highlight opportunities to implement the policies with fidelity.

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RECOMMENDATIONS | ORGANIZATIONAL CAPACITY AND COMMITMENT

A quality authorizer engages in chartering as a means to foster excellent schools that meet identified needs, prioritizes a commitment to excellence in education and in authorizing practices, and creates organizational structures and commits human and financial resources necessary to conduct its authorizing duties effectively and efficiently.

Recommendation 1.1: Demonstrate a commitment to high-quality authorizing by implementing adopted policies with fidelity and holding schools to rigorous performance expectations.

While Idaho PCSC has made great strides in revising and improving the policies that guide its work in recent years, the authorizer does not consistently hold schools accountable to meeting expectations. Idaho PCSC has made revisions both in response to statutory changes and as part of the organization's continuous improvement efforts. One significant statutory change was the introduction of a charter renewal process; prior to 2014 legislation, charter contracts were issued for an indefinite time period and there was no explicit renewal process. From 2014 through 2016, Idaho PCSC designed a new performance framework, created a renewal process, and updated its policies and procedures to outline roles and expectations. The first two rounds of charter renewal occurred in 2017 and 2018. Simultaneously, Idaho PCSC has been working to continuously improve its new school process.

While Idaho PCSC has dedicated time and expertise to developing high-quality policies and practices, there are recent instances in which staff recommendations and/or commissioner decisions have not upheld the adopted performance standards. For example, consistent with language from NACSA's *Principles & Standards*, Idaho PCSC has adopted a policy that renewal decisions shall be "based on documented outcomes" and "past outcomes, not on promises of future improvement" (Idaho PCSC policies Section V). However, Idaho PCSC has renewed 25 out of 25 schools in the first two years of charter renewal, 14 of which had received the academic designation of "remediation" or worse in the year preceding their renewal. In these same two years, the commission approved eight out of eight new school applications, including one application in which the commission overruled a staff recommendation to deny. These decisions do not fully align to performance frameworks and adopted policies. In interviews, staff noted that several aspects of school accountability changed simultaneously; namely, Idaho PCSC adopted a new performance framework, the state adopted a new standardized assessment, and schools were subject to new contract terms that had not existed previously. In this context, Idaho PCSC staff and commissioners felt a potential non-renewal decision would have been indefensible on appeal. Additionally, commissioners noted that strong pro-charter groups have created political pressure to renew

charter schools across the state. This practice does not align with NACSA *Principles & Standards*, which states that a high-quality authorizer does not make renewal decisions, including granting probationary or short-term renewals, on the basis of political or community pressure or solely on promises of future improvement (page 20). In the coming years, Idaho PCSC should ensure that decisions align with its stated commitment to high-quality authorizing by non-renewing charter schools that receive low accountability ratings for consecutive years and only approving new school applicants that fully meet rigorous quality criteria.

Recommendation 1.2: Clarify and expand the current annual planning and goal-setting process to ensure that Idaho PCSC staff and commissioners are setting specific, measurable, attainable, relevant, and time-bound (SMART) goals each year as part of its commitment to continuous improvement.

As noted in the Strengths section, Idaho PCSC evidences a commitment to continuous improvement through ongoing professional development and specific improvement efforts, such as the development of clear policies and procedures. However, Idaho PCSC does not have an explicit goal-setting process conducted among commissioners and staff. At present, the staff evidence strong knowledge of state statute and national best practice, and can clearly articulate specific steps Idaho PCSC has taken to improve authorizing policy and practice. However, there is not a clear process or document to identify SMART goals for the commission each year. SMART goals would ensure alignment between commissioners and staff, and provide an opportunity to articulate goals in terms of school performance and measure progress toward those goals. In interviews, commissioners noted that they generally do not provide direct input into annual planning processes for the staff. At the observed December 2018 commission meeting, commissioners exemplified their commitment to continuous improvement as they discussed takeaways from recent conferences. For example, commissioners noted a desire to learn more about states, such as Colorado, in which district-issued tax-exempt bond dollars are accessible to charter schools for facilities. Idaho PCSC will better leverage staff and commissioner expertise and commitment if it conducts an explicit annual goal-setting process and then ties its goals back to opportunities to improve the overall performance of charter schools in its portfolio.

RECOMMENDATIONS | APPLICATIONS AND SCHOOL OPENING

A quality authorizer implements a comprehensive application process that includes clear application questions and guidance; follows fair, transparent procedures and rigorous criteria; includes an interview of all qualified applicants; and grants charters only to applications that demonstrate strong capacity to establish and operate quality schools.

A quality authorizer uses the pre-opening process to build relationships, set expectations, and provide technical assistance to schools, and does not let schools open that have not demonstrated their readiness to serve students.

Recommendation 2.1: Enforce high expectations by only approving petitions from boards, school leaders, and founding teams that have sufficient capacity to oversee and run high-quality schools.

While Idaho PCSC staff members thoroughly review each petition and make deliberate and thoughtful approval or denial recommendations, there remains some misalignment between staff recommendations and commissioners' decisions. Idaho PCSC's executive director and both program managers read each application in full, write individual analyses, and discuss those analyses. The staff recommendations to the commissioners note areas of weakness and often propose conditions as part of the approval recommendations. However, commissioners have occasionally removed suggested conditions or gone against staff recommendations altogether, which has on occasion resulted in failed or troubled schools. For example, a school that commissioners approved against staff's recommendation has failed to meet several basic terms of its contract, has faced high staff and board turnover, and has garnered community complaints and compliance violations.

Additionally, Idaho PCSC placed conditions on more than a third of approved petitions in the past two years, suggesting that several approved applicants were not yet ready to open schools. Overall, Idaho PCSC has approved 100 percent of the charter petitions that have come before the commission in the past two years. In interviews, commissioners acknowledge that, in retrospect, they should not have approved some of the recent applications or at least required some applicants to undergo an additional planning year in order to open successfully. This is a continuation of a trend that NACSA identified in 2014, when Idaho PCSC was approving the great majority of petitions despite significant shortcomings. Given the recently awarded federal CSP grant and expected influx of charter applications, it is particularly important to ensure alignment among staff members and commissioners now to enforce high expectations for new applications.

As part of enforcing high expectations for new school applicants, commissioners should take note when staff point out weaknesses in the founding board and/or school leadership teams as part of their due diligence and analysis. In interviews, commissioners recognize the need to improve screening and expectations for the capacity of board members. To support commissioners in better understanding how staff are evaluating the capacity of founding teams, Idaho PCSC should consider more detailed training for commissioners in both nationally accepted best practices and the details of the current evaluation process, such as the capacity interview that the staff conducts.

Idaho PCSC's new petition committee is an encouraging development in this regard. In 2018, Idaho PCSC established a petition committee composed of commissioners and staff members to support a more thorough analysis of incoming applications and create the space for detailed reflection on past application cycles. In interviews, commissioners and staff members assert that the newly established committee enables them to focus on particular issues and better understand the rationale behind staff members' recommendations. The petition committee is a positive step toward improving alignment between staff recommendations and commissioner decision-making in an effort to enforce rigorous standards.

Recommendation 2.2: Apply clear quality criteria to evaluate new school petitions.

Idaho PCSC currently uses its guidance documents for new school applicants and for outlining standards of quality to establish and apply quality criteria for new school applicants. However, the documents do not fully align and do not clearly present quality criteria for new school applicants. There are elements of Idaho PCSC's new school evaluation process that reflect best practices outlined in NACSA's *Principles & Standards*, including substantive in-person interviews with each qualified applicant (pg. 13). Yet in interviews, staff explained that the standards of quality were developed after the guidance document and that the two documents present a few inconsistencies; for example, the guidance document suggests applicants include their rationale for selecting an Educational Service Provider (ESP) but the standards of quality do not clarify selection criteria for an ESP beyond evidence that an ESP "provides high-quality service to similar schools." (Standards of Quality Appendix E sub-bullet d.) While staff attempt to use the standards of quality to review each application, the document is general enough such that reviewers can interpret and apply expectations differently. For example, one part of the document reads, "The special services plan is

complete and addresses the needs of special populations, including, but not limited to: special education, at-risk, gifted, and English Language Learners." While this statement identifies general content that should be included in an application, it does not describe the details that a quality response should include. For instance, it does not instruct the reviewer that schools must have processes in place to identify students with special needs or that once an Individualized Education Plan has been established, it must be updated regularly and discussed with parents. In interviews, Idaho PCSC staff indicate that they used to employ a more detailed rubric as part of the application review process but ultimately discontinued use of that rubric because it seemed to provide too much guidance to applicants and not enough space for staff to exercise professional judgment. While NACSA acknowledges that authorizers should use professional judgment when evaluating applications, it is still important that "evaluation criteria describe both the rigorous standard and the specific information required to meet the standard" (Quality Practices Project, pg. 18). Idaho PCSC should ensure full alignment between the guidance document and the standards of quality document, and further, provide sufficient detail to apply quality criteria objectively.

Recommendation 2.3: Include external evaluators in the application review process.

While Idaho PCSC staff members collaborate internally to evaluate new school applications, Idaho PCSC does not currently employ external reviewers. External reviewers would strengthen the process and help substantiate staff recommendations to commissioners. Idaho PCSC staff members should train each external reviewer on Idaho PCSC's most updated petition review process. Every external reviewer should provide a thorough written analysis of the petition and participate in the related capacity interview.

Per NACSA's *Principles & Standards* (pg. 13), incorporating external evaluators with educational, organizational, financial, and legal expertise will provide important perspectives to commissioners and highlight relevant best practices. External reviewers often have experiences working with other authorizers and in other states, and thus can bring additional perspectives and expertise to the petition review process. This added capacity ultimately benefits Idaho PCSC staff members and commissioners by increasing breadth of expertise and by limiting the burden of all Idaho PCSC staff reading every petition. Additionally, in cases of application denial, the inclusion of external evaluators helps legitimize such decisions to the public.

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RECOMMENDATIONS | SCHOOL MONITORING AND INTERVENTION

A quality authorizer defines and incorporates into the charter contract clear, measurable, and attainable academic, financial, and organizational performance standards and targets that the school must meet as a condition of renewal.

A quality authorizer conducts contract oversight that competently evaluates performance and monitors compliance; ensures schools' legally entitled autonomy; protects student rights; informs intervention, revocation, and renewal decisions; and provides annual public reports on school performance.

Recommendation 3.1: Develop and implement a systematic process to evaluate schools on the operational framework that also leverages the renewal site visit.

Though the operational performance framework measures are strong, Idaho PCSC has not fully codified how it tracks submissions and how each submission maps to an indicator on the framework. To evaluate a school against the framework, Idaho PCSC currently collects some information from schools and other state agencies, including the Department of Education. However, Idaho PCSC does not efficiently collect all requisite information or appropriately categorize that information. For example, the Department of Education oversees charter school compliance with special education law and maintains all the information regarding compliance with the law. Special education compliance also appears on Idaho PCSC's operational framework but Idaho PCSC does not have a defined procedure to obtain specific compliance information from the Department of Education on a set timeline. With multiple sources of information, it is especially critical that Idaho PCSC codify the process to obtain data on each operational framework indicator to consistently hold all schools accountable for their performance.

To improve operational oversight, Idaho PCSC should continue the work it has started to map the various documents and data submissions to the indicators on the operational framework. This map should align to the submissions calendar that Idaho PCSC already supplies to schools and the map should articulate the specific evidence used to evaluate each indicator. The mapping process itself will help staff identify areas of the framework in which Idaho PCSC may not be presently collecting sufficient data or information. For example, in interviews staff mentioned that they do not pro-actively collect information about school enrollment practices each year and instead rely on community members or school staff members to raise any enrollment concerns directly to Idaho PCSC. Instead, Idaho PCSC could review enrollment forms and/or lottery documents or even use a "mystery caller" strategy to confirm that schools are adhering to open enrollment rules. In addition to the map, Idaho PCSC should continue its work to develop a data system or tracking tool that confirms whether a school has submitted each item in a timely manner and whether the item met expectations.

Finally, Idaho PCSC should embed operational framework components into the pre-renewal site visit rubric to capitalize on the opportunity to confirm previously submitted information. The pre-renewal site visit is the only site visit during which Idaho PCSC uses pre-established criteria to evaluate a school; other site visits are primarily for relationship-building visits and occur in an ad hoc manner. Currently, site visit evaluators collect some qualitative information pertinent to Idaho PCSC's operational framework, such as whether the school is faithful to its mission and is implementing the key design elements outlined in the performance certificate. However, the site visit rubric does not address the organizational framework and does not include important components of the framework, such as employee credentialing, background checks, and information handling, among other items. Idaho PCSC could verify, or spot check, all these components during the pre-renewal site visit.

Recommendation 3.2: Clarify intervention processes to stipulate triggers for intervention, Idaho PCSC procedural steps, and expectations for school responses.

Though Idaho PCSC has several building blocks of a clear intervention process in place, triggers, procedural steps, and expected school responses are not codified fully. Idaho PCSC provides courtesy letters to schools when concerns arise regarding a school's operations, legal compliance, or academic status. For financially underperforming schools, Idaho PCSC has the option to issue a notice of concern and has, at times, requested more frequent financial reports from a school. Idaho PCSC also notifies the Department of Education, which may elect to modify the school's payment schedule to ensure that funds are not advanced to a financially faltering school. However, the courtesy letters and financial notices of concern do not consistently explain what procedural steps Idaho PCSC will take to support schools nor do they always identify clear time-bound expectations for schools to rectify the issues. For example, in a recently issued sample notice of concern, Idaho PCSC notes that the school in question is likely to experience a substantial budget shortfall based on low enrollment but does not require a follow-up response from the school, such as submitting a revised balanced budget on a specific

timeline. Clearly documenting procedural steps and schools' responses to notices of concern would enable Idaho PCSC to address problematic practices consistently across its portfolio and would also hold schools accountable to meeting expectations.

Idaho PCSC has not clearly identified the levels of under-performance that trigger intervention or that could impact renewal prospects. The 2017 portfolio annual report identifies a number of schools that were underperforming in the operational or financial frameworks. However, there was not a clear paper trail of courtesy letters or notices of concern for each of the impacted schools and it appeared that some performance issues had persisted for multiple years. For example, as of January 2018, there were at least three schools that had not met expectations on the financial performance framework for multiple consecutive years. Furthermore, two of these schools were renewed in 2018 without specific financial conditions to their renewal. In interviews, commissioners acknowledge that Idaho PCSC has not placed suitable financial performance conditions on schools demonstrating financial shortcomings. Additionally, commissioners suggest in interviews that Idaho PCSC finds it difficult to enforce interventions while still providing schools the appropriate level of autonomy. To protect school autonomy, Idaho PCSC should avoid prescriptive inputs that change the school's program and, instead, focus on establishing clear expectations for outputs.

While preserving the existing policies regarding courtesy letters and notices to entities responsible for enforcement, Idaho PCSC should develop more detailed procedures to guide intervention. Drawing from NACSA's *Principles & Standards*, Idaho PCSC should develop and publish intervention procedures that state the conditions that may trigger intervention and the types of actions that may result. Clearly identifying the triggers for different tiers of intervention would enable Idaho PCSC to provide consistent support to schools in similar situations. The procedures should include provisions such that, for a school rated as "does not meet" on a specific indicator, Idaho PCSC codifies the improvements necessary and the expected timeline, based on the severity of the issue. The procedures should also include descriptions of how non-compliance could escalate to becoming a condition on renewal and/or a possible component of a non-renewal or revocation decision. Additionally, Idaho PCSC should issue and enforce notices of financial concern that include specific time-bound corrective action and, if a school is going through a renewal, include the same types of specific and time-bound corrective action steps as conditions to the renewal. Idaho PCSC should consider conducting more regular site visits using clear evaluative criteria, in addition to the pre-renewal site visit, to schools with intervention plans. Specific, time-bound, and published Idaho PCSC intervention procedures would support the schools in greatest need of improvement.

RECOMMENDATIONS | RENEWAL, EXPANSION, AND CLOSURE

A quality authorizer designs and implements a transparent and rigorous process that uses comprehensive academic, financial, and operational performance data to make merit-based renewal decisions and revokes charters when necessary to protect student and public interests. A quality authorizer encourages high-performing charter schools to expand while establishing clear eligibility standards for school past performance and a clear process for considering expansion and replication requests.

Recommendation 4.1: Renew only schools that have met the standards for academic performance laid out in the accountability frameworks and embedded in the charter performance certificates.

Though Idaho PCSC has strong stated policies and procedures to hold schools accountable for performance, decisions to renew schools do not consistently align to the established performance expectations. In the spring of 2018, Idaho PCSC renewed 13 charter schools, but only seven of these schools met academic performance expectations in the most recent year (i.e. 2016-17) and only four schools met academic expectations in at least three of the four years under review. Similarly, in 2017, Idaho PCSC renewed 12 charter schools but only four of the 12 schools had met academic expectations in the most recent year (i.e. 2015-16). As noted in Recommendation 1.2, the renewal process is still relatively new alongside new standardized assessments and other accountability-related statutory changes. While the nascency of the overall process and the changes to the academic performance framework can complicate the application of rigorous expectations in renewal, the net effect of these two cycles of charter renewal could be detrimental to students, as evident in the assessment data. Ten of the recently renewed charter schools have math proficiency rates more than 15 points lower than the state average and two of these schools are more than 30 points lower than the state average. Four of the recently renewed charter schools have literacy proficiency rates more than 15 points lower than the state average. Furthermore, because Idaho statute only provides for a five-year charter contract term, each renewed school received five additional years to serve students.

Idaho PCSC policies indicate that "the [school's] academic accountability designation shall guide the PCSC's renewal or non-renewal decision-making" and further that "schools achieving an academic accountability designation of critical are likely to be recommended for non-renewal." These policies align to NACSA *Principles & Standards*, which state that a quality authorizer "grants renewal only to schools that have achieved the standards and targets stated in the charter contract" and by extension, the performance frameworks articulated in that contract. The established policy aligns to both statute and NACSA recommendations by creating a focus on academic achievement in renewal decision-making. However, decision-making does not align to the stated policy. If implemented as written, the renewal policy could ensure that students are not continuing to

attend schools that significantly underperform state averages.

Recommendation 4.2: Clarify and consistently enforce financial accountability policies.

Idaho PCSC renewal decisions and conditions on applicable renewals do not consistently reflect whether a charter school has met expectations on the financial performance framework. In the 2018 renewal cycle, Idaho PCSC recommended four schools for renewal, inclusive of evidence that the schools were not meeting financial performance expectations. Two of these schools received "critical" ratings on the financial performance framework and yet the renewal recommendations did not include specific financial targets for the schools to reach during their renewed performance certificates. Idaho PCSC policies indicate that "the academic accountability designation shall guide Idaho PCSC's renewal or non-renewal decision-making. Renewal or non-renewal decision-making shall also be influenced by results on the financial, operational, and mission-specific sections of the framework." This policy statement indicates that financial performance should factor into renewal decisions but it does not clearly state that a school could be non-renewed based solely on its financial performance. To ensure that schools maintain appropriate financial sustainability, Idaho PCSC should clarify in policy and practice that schools could be non-renewed based on their financial performance. Furthermore, when making renewal decisions for schools with persistently poor financial performance, Idaho PCSC should either non-renew the school or establish specific, time-bound conditions for improvement that will be applied promptly in the new charter term, consistent with Recommendation 4.1 in this section. It is important to enforce expectations for financial performance and sustainability to ensure continuity of service to students. If a school must close suddenly due to financial concerns, students may not have sufficient time to identify a new high-quality school to attend or that school may already be full.

Recommendation 4.3: Apply renewal conditions in a timely manner and amend Idaho PCSC policies and procedures to ensure that performance expectations are enforced for each year of the charter term.

Idaho PCSC has offered conditional renewals to all schools

that were not meeting performance expectations at the time of their renewal, However, the conditions are not evaluated until three years into the new performance certificate and thus not soon enough to fully protect the interest of students. In the past two years, Idaho PCSC has offered conditional renewal to 14 out of 25 charter schools that were not yet meeting academic performance expectations as of their renewal. Idaho PCSC placed performance conditions on these renewals designed to facilitate progress monitoring during the term of the new performance certificate. However, there is a time lag between the start of the new contract and the effective date for the performance conditions. For example, a school that earned renewal in 2018 received academic conditions to be evaluated after the conclusion of the 2020-21 school year, more than three years after the renewal decision and into the fourth year of the renewed charter term. Conditions should be evaluated in a timely manner and in a stepwise progression. For example, if Idaho PCSC provides renewal conditions in the spring, a school would have sufficient notice to plan and implement program improvements that should produce results at the end of the first year of the new contract. For conditions requiring more time to address, Idaho PCSC should hold schools accountable to implementing planned programmatic changes that demonstrate gradual improvements and culminate in the school meetings its conditions by an appropriate timeline determined by Idaho PCSC.

Idaho PCSC should clarify language in its adopted policies to ensure that schools understand that renewal decisions, including conditional renewals, will be based on a cumulative performance record. The policies currently state that "schools achieving *an* academic accountability designation of honor or good standing shall be recommended for renewal" [emphasis added]. The use of the article "an" in this part of the policies suggests that renewals hinge primarily on the most recent year of performance. Idaho PCSC should amend existing authorizing policies and applied practices to ensure that the full cumulative performance record factors into the renewal decision, including whether the school receives a conditional renewal.

Recommendation 4.4: Establish a clear revocation policy and process to ensure that schools can be held accountable to performance expectations in a timely manner.

While Idaho PCSC maintains many clear policies and processes in the areas of annual performance reviews and charter school renewal, there is not an explicit policy nor procedure for charter school revocation beyond what is specifically articulated in statute, and the statute has some ambiguity in this area. In interviews, staff indicated that when the statute changed to require regular charter renewals, the focus of the authorizing work shifted from revocation to renewal as the primary mechanism to enforce school accountability. However, in the process of rolling out the new renewal policies and processes, Idaho PCSC has sacrificed some clarity regarding the grounds for revocation. At present, Idaho PCSC contends that charter revocation is only possible in two situations. The first is revocation if the school does not meet a specific written condition for school improvement. The second is revocation in the event of an imminent public safety issue. These two reasons are articulated in Section 33-5209C(7) of the Idaho statute. However, another portion of statute indicates that "an authorized chartering entity must develop revocation and non-renewal processes" and further that the prospect of revocation or renewal "shall be limited to failure to meet the terms of the performance certificate *or* the written conditions established pursuant to the provisions of subsection (1) of this section," [*emphasis added*] Section 33-5209B(8). Considering the "or" component of this statement, the statute suggests that non-renewal or revocation can occur if a school fails to meet the terms of its performance certificate (i.e. charter contract). Further, the statute indicates that authorizers should develop articulated processes to conduct such a revocation. NACSA recommends that Idaho PCSC return to addressing revocation clearly in its adopted policies. A clear revocation policy should identify the performance levels over time that would trigger revocation and reference back to the statutory expectation that a school meet all the terms of its performance certificate.

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LOOKING FORWARD

SHORT-TERM RECOMMENDATIONS

RECOMMENDATION

1.2. Clarify and expand the current annual planning and goal-setting process to ensure that Idaho PCSC staff and commissioners are setting specific, measurable, attainable, relevant, and time-bound (SMART) goals each year as part of its commitment to continuous improvement.

2.2 Apply clear quality criteria to evaluate new school petitions.

2.3 Include external evaluators in the application review process.

3.2. Clarify intervention processes to stipulate triggers for intervention, Idaho PCSC procedural steps, and expectations for school responses.

4.3. Apply renewal conditions in a timely manner and amend Idaho PCSC policies and procedures to ensure that performance expectations are enforced for each year of the charter term.

4.4. Establish a clear revocation policy and process to ensure that schools can be held accountable to performance expectations in a timely manner.

LONG-TERM RECOMMENDATIONS

RECOMMENDATION

1.1. Demonstrate a commitment to high-quality authorizing by implementing adopted policies with fidelity and holding schools to rigorous performance expectations.

2.1. Enforce high expectations by only approving petitions from boards, school leaders, and founding teams that have sufficient capacity to oversee and run high-quality schools.

3.1. Develop and implement a systematic process to evaluate schools on the operational framework that also leverages the renewal site visit.

4.1. Renew only schools that have met the standards for academic performance laid out in the accountability frameworks and embedded in the charter performance certificates.

4.2. Clarify and consistently enforce financial accountability policies.

HELPFUL RESOURCES AND PROGRAMS

- To support development of a rubric for the new school petition process, see NACSA's guidance on Application Process and Decision Making (https://www.qualitycharters.org/wp-content/uploads/2018/11/NACSA_Core_Resources_Application_Process_and_Decision_Making.pdf)

- To improve ongoing monitoring work, Idaho PCSC could consult NACSA's intervention protocol (https://www.qualitycharters.org/wp-content/uploads/2019/01/Intervention_Protocol.pdf)

- To support the development of a revocation policy and process, Idaho PCSC could review NACSA's guidance on tiered intervention (https://www.qualitycharters.org/wp-content/uploads/2019/01/Intervention_Protocol.pdf)

BIOGRAPHIES

Brenna Copeland is the founder of EdPlex, a consulting company focused on supporting schools and districts to rapidly improve student achievement. Brenna has helped establish school accountability procedures at the state and local levels, analyzed district supports through a lens of academic outcomes, and helped governing bodies make data-driven decisions in the interest of students. Brenna has 16 years of experience in the education field among high-performing charter schools and districts. She led Denver Public Schools' charter and innovation school authorizing work from 2011 to 2015, responsible for more than 80 schools. Previously, Brenna co-founded a network of K-8 charter schools in Washington D.C. She also served as the CFO at KIPP DC while that charter network grew from one to five schools. Brenna has a certificate from Relay Graduate School of Education in Principal Supervision, an MBA from Duke University, and a BA from Rice University.

Adam Aberman is the CEO and founder of The Learning Collective (TLC). Adam has profound content expertise in technology-based innovation and a 20-year track record educating young people in numerous venues, from traditional public schools to school district administration trainings. Over the past 15 years, Adam has assessed more than 200 current – and 100 proposed – charter schools nationally (California, Colorado, Illinois, Indiana, Michigan, Minnesota, Nevada, New Jersey, New York, and Washington), including being the lead writer for charter renewal inspection visits, charged with evaluating schools and writing the reports that are submitted to authorizers. During every school visit, Adam evaluates the effectiveness of charter schools on a wide range of issues. The range of issues includes schools' use of assessment data, curricular development and alignment with the Common Core, instructional leadership and staff evaluations, classroom instruction, professional development, board governance, parental involvement, and school finances. Adam has also worked with the NACSA and other organizations on evaluation and strategic planning projects regarding Florida, Minnesota, New York, and Ohio authorizers. Other TLC clients have included Alliance College-Ready Public Schools, Chicago Public Schools, College Board, Inglewood Unified School District, KIPP, Tiger Woods Foundation, and UCLA. Adam received an MPP, with an emphasis in Education, from Harvard University's Kennedy School of Government, and a BA from Vassar College.

SOURCES

Idaho Charter School Law
Budget Documents
Organizational Charts
Annual Report

Application Packet and Criteria
Applicant Materials and Sample Applications
Capacity Interview Materials
Pre-opening Materials

Charter School Contract and Sample Contracts
Monitoring Guidance
Charter School Performance Framework
Site Visit Protocol and Reports

Renewal Contracts and Applications
Renewal Reports
Expansion Amendment Requests
Closure Notices and Protocol
Renewal Process Guidance for Schools
Sample Closure Plan

Interviews with Staff, Board Members, and School Leaders
School Leader Survey

August X, 2020

David Leroy
P.O. Box 193
Boise, Idaho 83702

Re: Petition for Declaratory Rulings

Dear Mr. Leroy:

This letter responds to the petition for declaratory ruling ("Petition") concerning the National Association of Charter School Authorizers ("NACSA") submitted by you on behalf of your client Karen McGee to the Idaho State Board of Education ("Board") pursuant to Idaho Code section 67-5232. The Petition identifies alleged matters concerning NASCA and seeks declaratory rulings on the applicability of provisions within the Bribery and Corrupt Influences Act, Idaho Code title 18 chapter 13, the Ethics in Government Act, Idaho Code title 74 chapter 4, Idaho Administrative Code, IDAPA 08.02.02.076, Code of Ethics for Idaho Professional Educators, and Board Policy II.Q., Code of Ethics and Ethical Conduct – All Employees.

Idaho Code section 67-5232 authorizes a petition to an agency concerning the applicability of any statutory provision or of any rule administered by the agency.

The Petition alleges that an employee of NACSA offered an employee of the Idaho Public Charter School Commission (Charter Commission) an opportunity to apply for employment with NACSA after or while NACSA performed a "formative evaluation" of the Charter Commission. The evaluation attached to the Petition as Exhibit D indicates that the report was funded by the U.S. Department of Education through the National Charter School Resource Center. The Petition states that the Charter Commission employee did not apply for or accept employment from NACSA. The Petition does not allege that the Charter Commission paid for the NACSA report.

Sections 74-402, 74-403 and 18-1356(6), Idaho Code

The Petition partially quotes from the Ethics in Government Act and the Bribery and Corruption Act and requests that the Board issue a ruling as to the applicability of the above statutes. The Petition does not describe facts which would indicate that a Charter Commission employee was offered or received a gift or pecuniary benefit from NACSA. The Petition does not allege that NACSA was a party to a contract with the Charter Commission or in any manner subject to the jurisdiction or authority of the Charter Commission. Notification of an application for employment is not a gift or pecuniary benefit. The Board does not have statutory authority to enforce either statute against NACSA or its employees.

Idaho Administrative Code, IDAPA 08.02.02.076, Code of Ethics for Idaho Professional Educators and Board Policy II.Q

The Petition request a written declaratory ruling as the alleged facts and whether the conduct of NACSA constituted "an attempt to create a violation of professional educator and vendor or potential vendor rules" and whether the engagement of NACSA and Greg Richmond with the Charter Commission and grants related to it should "be investigated and/or acted upon pursuant to the IDAPA or Handbook authority of the Board."

IDAPA 08.02.02.076 applies to Idaho certified professional educators. The Petition does not allege that NACSA or any of its employees are Idaho certified professional educators. IDAPA 08.02.02.076 does not apply to NACSA or its employees.

Although not cited, it appears that the Petition is quoting from Board Policy II.Q which is a Board policy applicable to employees employed by entities governed by the Board. The Policy does not apply to NACSA as it is not an institution or agency under the Board's governance.

The Board does not have statutory authority to order or recommend that a third party not employed by an institution or agency under the governance of the Board be investigated for offering a Charter Commission employee an opportunity to apply for employment. There is no allegation that the Charter Commission paid NACSA for the "formative evaluation." There is no allegation that the Charter Commission employee accepted NACSA's offer to apply for employment. There is no allegation that the Charter Commission employee committed any ethical violations.

Conclusion and Notice Concerning Appeal

The Petition request that the Board issue a written declaratory ruling as to the applicability of the cited statutes to a third party. The Board does not have statutory authority to enforce those statutes and declines to issue the requested ruling. The Petition requests that the Board issue a declaratory ruling that NACSA and its employee should be investigated for attempting to create a violation of a Code of Ethics applicable to Idaho certified professional educators or a violation of Board Policy

II.Q. Neither IDAPA 08.02.02.076 nor Board Policy II.Q apply to NACSA or its employees. The allegations do not support the requested investigations. The requested ruling is denied.

Pursuant to the Idaho Rules of Administrative Procedure of the Attorney General, IDAPA 04.11.01.402, this letter is an order containing the final agency action related to the Petition. Pursuant to Idaho Code sections 67-5270 and 67-5272, any party aggrieved by this order may appeal to district court by filing a petition in the District Court in the county in which:
         i. The order was issued; or
         ii. The party appealing resides, or operates its principal place of business in Idaho.
This appeal must be filed within twenty-eight (28) days of the service date of this letter. *See* Idaho Code § 67-5273.

Sincerely,

Debbie Critchfield
President, Idaho State Board of Education

SUBJECT
K-20 Education Strategic Plan – Mission and Vision

REFERENCE

February 2018	The Board approved the State K-20 Education Strategic Plan.
April 2018	The Board reviewed the institution, agency and special/health programs strategic plans.
June 2018	The Board approved the annual updates to the institution, agency, and special/health program strategic plans.
December 2018	The Board reviewed and directed staff to make updates to the State K-20 Education Strategic Plan.
February 2019	The Board approved the State K-20 Education Strategic Plan.
April 2019	The Board reviewed the institution, agency and special/health programs strategic plans.
June 2019	The Board approved the institution, agency and special/health programs strategic plans.
October 2019	The Board was presented with the institution and agencies performance measure reports and progress toward meeting their strategic plan goals.
May 2020	The Board discussed amendments to the Boards K-20 Strategic plan as part of a facilitated Board retreat.
June 2020	The Board approved the institution and agency strategic plan and delegated approval of the health and special program plans to the Executive Director.

APPLICABLE STATUTE, RULE, OR POLICY
Idaho Code § 67-1903 – Strategic Planning

BACKGROUND/DISCUSSION
The Board participated in a facilitated strategic planning session at the May 2020 Board Retreat. Dr. David Barkan facilitated discussion centered on the Board's K-20 strategic plan to help the Board achieves its goals.

The Idaho State Constitution, Article IX, Section 2, provides that the general supervision of the state educational institutions and public school system of the State of Idaho, "shall be vested in a state board of education, the membership, powers and duties of which shall be prescribed by law." Through responsibilities set in the State Constitution and Idaho statutes, the State Board of Education (Board) is charged with the general supervision, governance and control of all educational institutions and agencies supported in whole or in part by the state. This includes public schools, colleges and universities, Department of Education, Division of Career Technical Education, Idaho Public Television, and the Division

of Vocational Rehabilitation. The Board and the agencies of the Board are charged with enforcing and implementing the education laws of the state.

Due to these broad responsibilities, the Board serves multiple roles. The Board sits as a policy-making body for all publicly funded education in Idaho and provides general oversight and governance for public K-20 education and community colleges. The Board has a direct governance role as the Board of Regents for the University of Idaho and the board of trustees for the other public four-year college and universities. The K-20 Education strategic plan must encompass and serve all of these aspects of Idaho's public education system. The institution and agency strategic plans are then required to align with the Board's K-20 Education Strategic Plan.

IMPACT

Board approval of a new mission and vision statement will drive work on updates to the Board's K-20 Education Strategic plan that are scheduled to be brought back to the Board in December.

ATTACHMENTS

Attachment 1 – Proposed Mission and Vision Statement
Attachment 1 – Board K-20 Strategic Plan 2020 - 2025
Attachment 2 – State Strategic Planning Requirements

STAFF COMMENTS AND RECOMMENDATIONS

The Board's strategic plan is a forward looking roadmap used to guide future actions, define the vision and mission of Idaho's K-20 educational system, guide growth and development, and to establish priorities for resource distribution. Strategic planning provides a mechanism for continual review to ensure excellence in public education throughout the state. The strategic plan establishes the Board's goals and objectives that are consistent with the Board's governing ideals, and communicates those goals and objectives to the agencies and institutions under the Board, the public, and other stakeholder groups.

At the October regular Board meeting of each year, the Board reviews performance measures from the K-20 Education Strategic Plan as well as the performance of the agencies and institutions. Unlike the strategic plan work, the performance measure review is a backward look at progress made during the previous four years toward reaching the strategic plan goals and objectives. Section 67-2903, Idaho Code sets out minimum planning elements that are required to be in every agency and institution strategic plan as well as the annual review and updating requirement that is the basis for the Board's strategic planning cycle.

BOARD ACTION
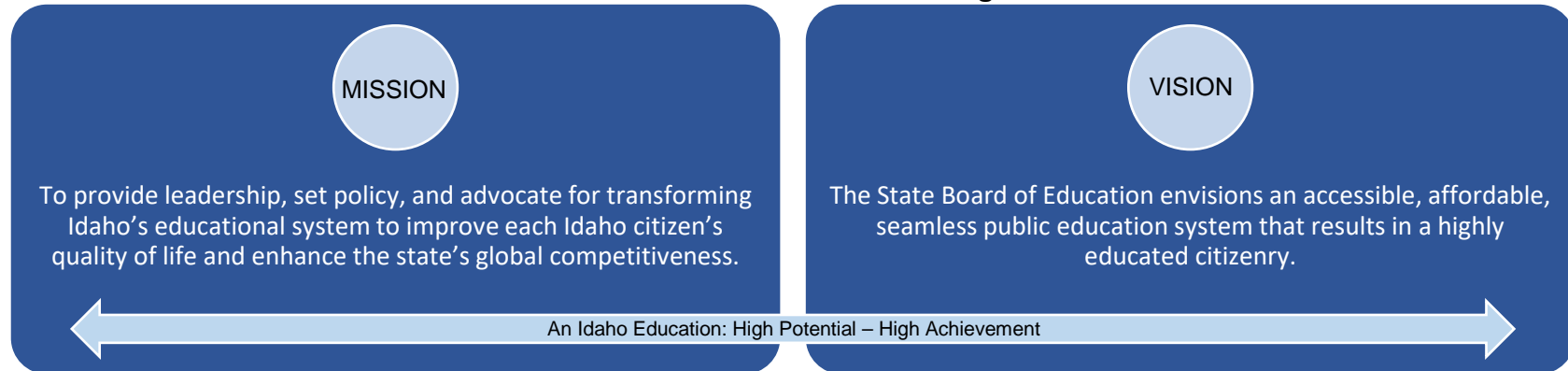
I move to approve the Mission and Vision Statements as provided in Attachment 1.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

Idaho State Board of Education

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

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

An Idaho Education: High Potential – High Achievement

PROPOSED AMENDMENTS:

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~~ To drive improvement of the K-20 education system for the citizens of Idaho, focusing on quality, results, and accountability.

VISION STATEMENT
~~The State Board of Education envisions an accessible, affordable, seamless public education system that results in a highly educated citizenry~~A student-centered education system that creates opportunities for all Idahoans to improve their quality of life.

VALUES
Access
Innovation
Preparedness
Resilience

GOAL 1: EDUCATIONAL SYSTEM ALIGNMENT (systemness) – Ensure that all components of the educational system are integrated and coordinated to maximize opportunities for all students.
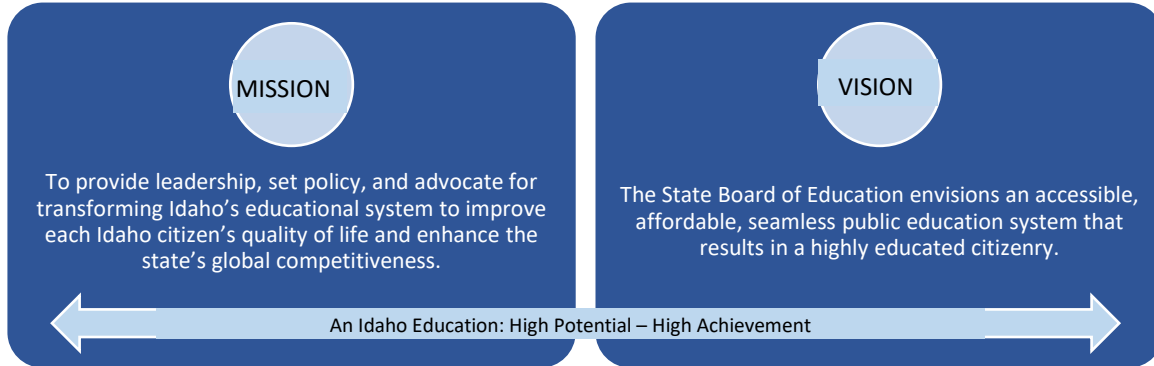
GOAL 2: EDUCATIONAL READINESS (student-centered) – Provide a rigorous, uniform, and thorough education that empowers students to be lifelong learners and prepares all students to fully participate in their community and postsecondary and workforce opportunities by assuring they are ready to learn for the next educational level.

GOAL 3: EDUCATIONAL ATTAINMENT (opportunity) – 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.

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

Idaho State Board of Education

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

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

An Idaho Education: High Potential – High Achievement

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[Error! Bookmark not defined.]

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%[Error! Bookmark not defined.] 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%[3]

4 year – less than 20%[3]

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.

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

<u>**Performance Measures:**</u>
  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%[3] or more

 IV.   **Percentage of Idaho high school graduates meeting college placement/entrance exam college readiness benchmarks.**
        Benchmark: SAT – 60%[1] or more
                       ACT – 60%[1] or more

  V.   **Percent of high school graduates who participated in one or more advanced opportunities.**
       Benchmark: 80%[1] or more

VI. **Percent of dual credit students who graduate high school with an Associates Degree.**
   Benchmark: 3%[2] or more

VII. **Percent of high school graduates who enroll in a postsecondary institution:**
   Within 12 months of high school graduation.
      Benchmark: 60%[3] or more
   Within 36 months of high school graduation.
      Benchmark: 80%[4] 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%[5] 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

<div align="right">**ATTACHMENT 2**</div>

North Idaho College	675
Boise State University	0
Idaho State University	300
Lewis-Clark State College	25
University of Idaho	0
Associate degrees	3925
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
Baccalaureate degrees	8280
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%[3] or more
   (4 year Institutions) 85%[3] or more

IV. **Percent of full-time first-time freshman graduating within 150% of time or less (2yr and 4yr).**
   Benchmark: 50%[3] 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[2] or less
    Benchmark: non-transfer students: 69/138[2] 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[6] or more, $16M[7] or more

II. **Proportion of postsecondary graduates with student loan debt.**
    Benchmark: 50% or less[8]

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%[4] 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[4] (using IPEDS calculation)

VI. **Expense per student FTE**
    Benchmark: $20,000[4] or less

VII. **Number of degrees produced**
    Benchmark: 15,000[3] 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%[4] or more

II.   **Percentage of undergraduate students participating in undergraduate research.**
Benchmark: Varies by institution[4]

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[9] 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[10] graduates at any one time

II.   **Idaho graduates who participated in one of the state sponsored medical programs who returned to Idaho.**
Benchmark: 60%[11] or more

III.   **Percentage of Family Medicine Residency graduates practicing in Idaho.**
Benchmark: 60%[11] or more

IV.   **Percentage of Psychiatry Residency Program graduates practicing in Idaho.**
Benchmark: 50%[11] or more

V.   **Medical related postsecondary programs (other than nursing).**
Benchmark: 100[9] 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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[1] Benchmark is set based on the increase needed to meet the state educational attainment goal (60%).

[2] Benchmark is set based on analysis of available and projected resources (staff, facilities, and funding).

[3] 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.

[4] 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).

[5] Benchmark is set based on the Georgetown Study of workforce needs in Idaho in 2020 and beyond.

[6] Benchmarks are set based on an analysis of historical trends combined with desired level of achievement.

[7] 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.

[8] 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.

[9] New measure.

[10] Benchmark is set based on projected and currently available state resources.

[11] 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

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

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

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.

3

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

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.

SUBJECT
>   Amendment to Board Policy, Section I.O. – Data Management Council – First
>   Reading

REFERENCE

August 2011	Board approved the first reading of new Policy Board Policy I.O. Data Management Council, establishing the Data Management Council.
October 2011	Board approved the second reading of Board Policy I.O. Data Management Council.
August 2013	Board approved first reading of amendments to Board Policy I.O. removing a Board member as a member of the Council and adding additional student privacy language.
October 2013	Board approved second reading of the amendments to Board Policy I.O. Data Management Council.
February 2015	Board approved first reading of Board Policy I.O. Data Management Council establishing the representative from the Office of the State Board of Education as the chair to the Council.
April 2015	Board approved second reading of Board Policy I.O. Data Management Council.

APPLICABLE STATUTE, RULE, OR POLICY
>   Idaho State Board of Education Governing Policies and Procedures, Section I.O.
>   Section 33-133, Idaho Code

BACKGROUND/DISCUSSION
>   The Data Management Council (Council) is tasked with making recommendations
>   on the oversight and development of Idaho's Statewide Longitudinal Data System
>   (SLDS) and oversees the creation, maintenance and usage of said system. There
>   are currently 12 seats on the Council. The Council membership is made up of one
>   (1) representative from the Office of the State Board of Education, three (3)
>   representatives from public postsecondary institutions, of whom at least one shall
>   be from a community college and no more than one member from any one
>   institution; one representative who serves as the registrar at an Idaho public
>   postsecondary institution; two (2) from the State Department of Education; three
>   (3) representatives from a school district, with at least one from an urban district
>   and one from a rural district, and no more than one member from any one district;
>   one (1) representative from the Division of Career Technical Education; and one
>   (1) representative from the Department of Labor.
>
>   The two State Department of Education representatives on the Council were
>   employees working on the K-12 portion of the SLDS, ISEE. With the transition of
>   the ISEE to the Board Office, these staff are now staff from the Office of the State
>   Board of Education and are no longer representatives of the State Department of

Education. In order to assure there remains representation for the K-12 portion of the SLDS and representation from the State Department of Education, the Data Management Council is recommending the Council membership be amended to increase the number of representatives from the Board Office to two, reduce the representatives from the Department of Education to one, and to add an at-large position.

IMPACT

The proposed amendments would allow for continuity of focus for the committee.

ATTACHMENTS

Attachment 1 – Proposed Policy Amendment – First Reading

STAFF COMMENTS AND RECOMMENDATIONS

Attachment 1 shows the amendments recommended by the Data Management Council. The change in membership to two positions representing the Board Office and one representative of the Department of Education will maintain representation on the council of the postsecondary and K-12 portion of the SLDS at the state agency level, adding an additional at-large position will allow the Board to appoint a member to the council from any representative group that is identified that would be beneficial to the management of the SLDS.

BOARD ACTION

I move to approve the first reading of Board Policy I.O. Data Management Council as presented in Attachment 1.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

ATTACHMENT 1

Idaho State Board of Education
GOVERNING POLICIES AND PROCEDURES
SECTION: I. General Policies
SUBSECTION: O. Data Management Council   **April 2015**

The Idaho Data Management Council (hereinafter referred to as "Council") is a council established to make recommendation on the oversight and development of Idaho's Statewide Longitudinal Data System (SLDS) and oversees the creation, maintenance and usage of said system.

The purpose of the SLDS will be to allow longitudinal tracking of students from preschool through all levels of the public education system (elementary, middle and high schools, college and graduate school) and into the workforce. To reflect this scope, the SLDS will be referred to as a P-20W system. This system will collect data from a variety of disparate source systems, including the K-12 system developed by the State Department of Education, the systems in use at the various postsecondary institutions, the State Department of Labor, the National Student Clearinghouse, and others, and will transform that data into a single, coherent structure on which longitudinal reporting and analysis can be performed. The privacy of all student level data that is collected by the SLDS will be protected. A list of all data fields (but not the data within the field) collected by the SLDS will be publicly available. Only student identifiable data that is required by law will be shared with the federal government.

The construction, maintenance and administration of the P-20W SLDS shall be carried out by designated staff of the Office of the State Board of Education and State Department of Education. The role of the council is to provide direction and make recommendations to the Board on policies and procedures for the development and usage of the system, and to report back to the Board as needed on the progress made on any issues that require Board consideration.

1. Roles and Responsibilities
   In order to advise and make recommendation to the Board on the implementation of the SLDS, the council will report to the Board through the Planning, Policy and Governmental Affairs Committee. The scope of responsibilities of the Council will include the following:

   a. Data Standards and Quality
      i. Ensure that all data elements within the SLDS are clearly and unambiguously defined and used consistently throughout the system.
      ii. Ensure that the data within the SLDS is as complete and accurate as possible and complies with the agreed upon definitions.

   b. Access and Security
      i. Establish parameters for security and encryption of data uploads, data storage, user roles and access, privacy protection, and appropriate use of data.
      ii. Review and approve mechanisms (technical and procedural) for implementing the required security and access rights.

  iii. Establish guidelines for responding to requests for data access by various stakeholders, including school, district and college/university staff, education researchers, and the public.

 c. Change Management and Prioritization
  i. Propose enhancements to the SLDS, review enhancements proposed by other groups, and set priorities for the development of those enhancements.
  ii. Review and approve or deny any proposed changes to existing functionality, data definitions, access and security policies, etc.

 d. Training and Communication
  i. Establish guidelines for training of SLDS users, and review and approve specific training plans.
  ii. Ensure adequate communication concerning the SLDS.

In each of these areas, the Council shall develop policies and procedures for Board approval as appropriate.

2. Membership
The membership of the Council shall consist of:

 a. ~~One~~ Two representatives from the Office of the State Board of Education.

 b. Three representatives from public postsecondary institutions, of whom at least one shall be from a community college and no more than one member from any one institution.

 c. One representative who serves as the registrar at an Idaho public postsecondary institution, which may be from the same institution represented in subsection 3.c. above.

 d. ~~Two~~ One representatives from the State Department of Education.

 e. Three representatives from a school district, with at least one from an urban district and one from a rural district, and no more than one member from any one district.

 f. One representative from the Division of Career Technical Education.

 g. One representative from the Department of Labor.

 h. One at-large member

Original appointments shall be for terms that are initially staggered to provide a rolling renewal of appointments. Thereafter, appointments shall be for two years, commencing on July 1st. All members of the Council shall have equal voting privileges.

One of Tthe representatives from the Office of the State Board of Education shall serve as the Chair.

3. Nominating Process

The Council shall nominate candidates for membership for Board consideration. The list of candidates including letters of interest and biographical information must be forwarded to the Board for consideration not less than 60 days prior to expiration of the term of a committee member, or within 30 days after any vacancy.

   a. Incumbent Reappointment

   If the incumbent candidate is interested in reappointment and is eligible to continue serving based on the Council's current membership structure, the incumbent will provide in writing his or her interest for reappointment, which will be forwarded to the Board for consideration.

   b. Open Appointment
      i. Council members shall solicit nominations from all constituency groups.
      ii. Each nominee must provide a written statement expressing his or her interest in becoming a member of the Council. Each nominee must also provide a description of his or her qualifications.
      iii. The Council will review all nominations for the vacant position and will forward the qualified candidates with recommendations to the Board for consideration.

   The Board may, after a review of nominee's pursuant to the process described herein, consider other candidates for Council membership identified by the Board or its staff.

DIVISION OF CAREER TECHNICAL EDUCATION (DIVISION)

SUBJECT
Board Policy IV.E. Division of Career Technical Education – Occupational Specialist Endorsements – First Reading

REFERENCE

August 28, 2019	Board approved the first reading of proposed amendments to Board Policy IV.E adding three new sections of policy: secondary career technical program approval, allowable uses for added-cost funds, and formalizing occupational specialist certificate endorsements.
October 17, 2019	Board approved the second reading of proposed changes to Board Policy IV.E.
April 22, 2020	Board approved first reading of proposed amendments to Board Policy IV.E. grandfathering in certain occupational endorsements.
April 27, 2020	Board approved second reading proposed amendments to Board Policy IV.E.

APPLICABLE STATUTE, RULE, OR POLICY
Sections 33-105, and 33-2202, Idaho Code
Chapter 49, Title 33, Idaho Code
State Board of Education Governing Policies and Procedures IV.E.

BACKGROUND/DISCUSSION
The Division of Career Technical Education (Division) provides leadership, administrative and technical assistance, and oversight for career technical education programs in Idaho's public secondary schools and technical colleges. The Division is responsible for approximately $78M in state and federal funds for Idaho's career technical education programs

The Fire Service Training program was first established in 1967 by the Idaho Legislature as a program within the Division. This program maintains centralized student training records, supports a coordinated statewide, multi-agency training and testing calendar, and supports leadership and curriculum development of fire services through the six technical colleges with Fire Service Technology degree programs. The management of this program, along with the funding, was transferred to the former Eastern Idaho Technical College at the request of the Board in 2014. At the time, the move was designed to help streamline processes and tie more directly to the technical programs being offered while still maintaining oversight of the program due to the governance relationship between the technical college, the Division, and the Board as the Board for Career Technical Education in Idaho.

The proposed amendment to Board Policy IV.E. would clarify in Board policy the Division's function in administering statewide programs pursuant to section 4.a. and managing established statewide programs like the Fire Service Training program.

IMPACT

This agenda item clarifies the Division of Career Technical Education's role in oversight and responsibility for Fire Service Training in Idaho.

ATTACHMENTS

Attachment 1 – Board Policy IV.E. First Reading

STAFF COMMENTS AND RECOMMENDATIONS

The Fire Service Training program has existed based on legislative appropriation and has not previously been formally established in Board policy or state law. As the Board for Career Technical Education and pursuant Section 33-105, Idaho Code, the Board has the authority "to make rules for its own government and the government of its executive departments and offices," which includes the Division.

With the transition of Eastern Idaho Technical College to the College of Eastern Idaho, the management of this statewide program at the college is no longer a good fit. The Division has been in conversation with the College of Eastern Idaho, fire marshals around the state, and other stakeholder groups of this program and is requesting the program be moved back to the Division.

In addition to the Fire Service Training program, the Idaho Skills Training Advantage for Riders (STAR) program (established pursuant to Section 33-4902, Idaho Code) is managed by the Division. This program was established in 1994 and like the Fire Service Training program, maintains program specific accreditation and provides services statewide.

Approval of the proposed amendment would help to clarify and consolidate the Division's role with identified statewide programs in specific certification areas along with the responsibility for maintaining accreditation for the programs. Due to the variety of stakeholders impacted by the Fire Service Training program, the Division is proactively reaching out to gather feedback and make sure everyone has a solid understanding of how the change would affect the program.

Staff recommends approval.

BOARD ACTION

I move to approve the first reading of Board policy IV.E. Division of Career Technical Education as provided in Attachment 1.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

Idaho State Board of Education
GOVERNING POLICIES AND PROCEDURES
SECTION: IV. ORGANIZATION SPECIFIC POLICIES AND PROCEDURES
Subsection: E. Division of Career Technical Education ~~April 2020~~October 2020

1. Purpose.

   The Division of Career Technical Education (Division) provides leadership and coordination for programs in career technical education in various parts of the state. The general purpose of the Division is to carry out the governing policies and procedures of the Board and the applicable provisions of state and federal career technical education regulations assigned to the Division.

2. Delegation of Authority

   The Administrator is the chief program and administrative officer of the Division, is appointed by, and serves in this position at the pleasure of the Board. The Administrator of the Division of Career Technical Education serves as the chief executive officer of the statewide career technical education system with the responsibility to supervise and manage career technical education programs in Idaho within the framework of the Board's Governing Policies and Procedures for the organization, management, direction, and supervision of the agency and is held accountable by the Board for the successful functioning of the institution or agency in all of its units, divisions, and services pursuant to Board Policy I.E. Executive Officers. The Administrator shall report to the Board through the Executive Director. The Administrator is responsible for the preparation and submission, through the Executive Director, of any matters related to career technical education for Board review and action.

3. Definitions
   a. Concentrator means a secondary student enrolled in a capstone course.

   b. Local Education Agencies means a public school district or charter school, including specially chartered districts.

   c. Technical College Leadership Council (TCLC) means the career technical education deans of the six regional public technical colleges in Idaho.

   d. Technical Skill Assessment means an assessment given at the culmination of a pathway program during the capstone course and measures a student's understanding of the technical requirements of the occupational pathway.

   e. Workplace Readiness Assessment means an assessment of a career technical education student's understanding of workplace expectations.

4. Functions

The Division provides statewide leadership, administration, supervision, planning, and coordination for career technical education activities in Idaho. The major functions include:

a. Statewide Administration: maintaining a qualified professional staff to provide statewide leadership and coordination for career technical education and the programs offered in accordance with applicable state and federal ~~legislation~~regulation, Fire Service Training and STAR Motorcycle Safety Program.

b. Supervisory and Consultative Services: providing technical assistance to local education agencies to assist in the implementation and maintenance of career technical education programs including support and leadership for student organizations and education equity.

c. Planning: assisting local education agencies in the development of annual plans and data collection and analyzing services for the establishment of a five-year plan, annual plans, and accountability reports from the local education agencies.

d. Evaluation: conducting and coordinating career technical education evaluations in accordance with state and federal guidelines to monitor program activities and to determine the status of program quality in relation to established standards and access.

e. Budget Preparation: preparing annual budgets and maintaining a statewide finance and accountability system.

f. Program and Professional Improvement: initiating and coordinating research, curriculum development, process improvement, and staff development statewide.

g. Management Information: collecting, analyzing, evaluating and disseminating data and program information which provides a comprehensive source of accurate, current, and easily accessible information for statewide decision making.

h. Coordination: providing liaison with related state agencies and organizations, business and industry, and community-based organizations.

5. Organization.

The programs and services of the Division are organized into two (2) broad segments: (a) Regular Occupational Programs and (b) Special Programs and Support Services.

a. Regular Occupational Programs are programs designed to prepare students at the secondary and postsecondary levels with the skills, knowledge, attitudes, and habits necessary for entry-level employment in recognized occupations in Idaho

regions, and may extend to the Northwest and nationally. These programs also provide the supplemental training to upgrade the skills of those citizens of Idaho who are currently employed. Regular programs include clusters and pathways in the following program areas:

  i. Agriculture, Food & Natural Resources;
  ii. Business & Marketing;
  iii. Engineering & Technology Education;
  iv. Family & Consumer Sciences and Human Services;
  v. Health Professions and Public Safety; and
  vi. Trades & Industry.

A program quality manager is employed in each program area to provide leadership and technical assistance to local education agencies.

b. Special Programs and Support Services are special programs designed to serve students who are considered special populations, students with special needs, and include other program activities not considered occupational in nature. These programs include Single Parent/Displaced Homemaker, Education Equity, and middle school career technical education.

c. Through state and federal regulations, or by contract for administration, the Division may supervise and manage other career technical training programs as appropriate.

6. Program Delivery

Career technical education programs are made available at three (3) levels in Idaho -- secondary, postsecondary, and workforce training.

7. Secondary Programs

a. Secondary Programs are provided through participating local education agencies and career technical schools. Secondary programs are established by the Division and may be categorized as either a cluster program or a pathway program.

b. Cluster Program: provides introductory and intermediate courses as an introduction to a career technical area and the opportunity to learn workplace readiness expectations. A cluster program must meet the following requirements:

  i. Consist of a variety of foundation and intermediate courses within a single Career Cluster. The program does not culminate in a capstone course.
  ii. Offer a program that is three or more semesters (or the equivalent) in length.
  iii. Demonstrate a strong career/workplace readiness skills alignment.
  iv. Participate in a related Career Technical Student Organization.
  v. Maintain an active Technical Advisory Committee to guide program development and foster industry engagement.

  vi. Require a nationally validated, industry-based Workplace Readiness Assessment created to evaluate skills and attitudes needed for success in the workplace administered by an approved developer as part of the program.

c. Pathway Program: provides specific career area occupational preparation, the opportunity to learn workplace readiness expectations, and the knowledge and skill development required to transition into a similar postsecondary program. A pathway program must meet the following requirements:

  i. Consist of a sequence of courses that culminate in a capstone course and aligns with Board approved career technical education content standards.
  ii. Offer a program that is three or more semesters (or the equivalent) in length.
  iii. Demonstrate a strong career/workplace readiness skills alignment.
  iv. Participate in a related Career Technical Student Organization.
  v. Maintain an active Technical Advisory Committee to guide program development and foster industry engagement.
  vi. Require the Workplace Readiness Assessment as part of the program.
  vii. Demonstrate alignment to similar postsecondary program outcomes as well as to relevant industry recognized standards.
  viii. Offer work-based learning experience opportunities for students (paid or unpaid).
  ix. Require a pathway-identified Technical Skill Assessment for all students enrolled in the capstone course (concentrators).
  x. Ensure the program meets the requirements for concentrators to obtain Technical Competency Credit for aligned postsecondary programs.
  xi. Require a nationally validated, industry-based technical skill assessment administered by an approved developer.

d. All junior and senior concentrators are required to take the technical skill assessment associated with their program. In the event a senior concentrator is enrolled in a pathway program that does not yet have an approved technical skill assessment, that student will take only the workplace readiness assessment until the pathway program technical skill assessment has been approved.

e. All seniors enrolled in more than one career technical education course are required to take the workplace readiness assessment.

f. Secondary Program Approval

The Division accepts applications each year from local education agencies to establish new secondary career technical programs, change a program type or reactivate an inactive program. To be considered in a given fiscal year the application must be received no later than February 15. Only approved programs are eligible to receive added-cost funds, or additional career technical education funding including, Idaho Program Quality Standards, Program Quality Initiative, Workforce Readiness Incentive Grant, and federal Perkins funding. In order to receive added-cost funds, a program must also be taught by an appropriately certified career technical education teacher. Career technical education teacher certification requirements are established in IDAPA 08.02.02. Applications must be submitted in a format established by the Administrator.

The Division will evaluate applications on standard criteria. Approval of new programs and reactivation of inactive programs will be based on available funding; priority will be given to pathway programs. A local education agency must demonstrate that, as part of its decision for creating, changing, or reactivating a career technical program, the local education agency has considered the recommendations from a local technical advisory committee. If such a committee does not already exist, the local education agency must create a committee for the express purpose of evaluating local and/or regional need for the proposed career technical program and for providing guidance on the application for such program. Applications must indicate if the program is a cluster or a pathway program and will be evaluated according to the specific program type. Denial of applications will be based on failure to meet the application requirements, including but not limited to missing deadlines, information, failure to meet minimum program requirements or failure to respond to any request for additional information within the timeframe specified in the application. Local education agencies will be notified of their application status on or before April 30 of the application year. Prior to receiving added-cost funds, the local education agency must submit the applicable statement of assurances, as outlined in the application approval letter.

i. Comprehensive high school new cluster programs will be evaluated on the following criteria:

   1) Meeting minutes that reflect recommendations from the local technical advisory committee
   2) Alignment with one of four approved cluster program areas
   3) Provides basic workplace readiness skills
   4) Connection to a Career Technical Student Organization (CTSO) supported by the Division
   5) Representation on the technical advisory committee in alignment with the program area industry
   6) Realistic, applied learning, provided through lab and industry-related activities

    7) Facilities to accommodate the program with equipment and space
    8) Agreement with the Statement of Assurances, as defined in the application

ii. Comprehensive high school new pathway programs will be evaluated on the following criteria:

    1) Meeting minutes that reflect recommendations from the local technical advisory committee
    2) Alignment with one of the approved pathway programs established by the Division
    3) Provide basic workplace readiness skills
    4) Consists of sequential, intermediate and capstone courses that meet the minimum requirements
    5) Connection to a Career Technical Student Organization (CTSO) supported by the Division
    6) Technical advisory committee that includes representatives from the identified occupational pathway
    7) Realistic, applied learning, provided through lab and industry-related activities
    8) Work-based learning opportunities
    9) Regional need for the program, established through labor market data
    10) Alignment with Board-approved program standards
    11) Alignment to related postsecondary program
    12) Facilities to accommodate a pathway program with the appropriate and relevant equipment and space for the pathway
    13) Agreement with the Statement of Assurances, as defined in the application

iii. Career Technical School (CTS) pathway programs must meet the evaluation criteria for a new pathway program, as well as the criteria outlined in IDAPA 55.01.03.

g. Allowable Use of Added-Cost Funds

Added-cost funds are distributed to school districts to cover instructor and program expenses beyond those normally encountered by Idaho public schools at the secondary level. Allocations are calculated based on career technical education teacher full-time equivalency (FTE) and must be used to support all career technical education programs in the school districts. Added-cost funds may only be used for expenses directly related to an approved career technical education program in five (5) categories:

i.   Instructional and Program Promotion Materials and Supplies

1) Single copy reference materials, including single-user electronic reference materials
2) Consumable student lab and classroom manuals
3) Consumable materials and supplies that support the instructional program
4) Workplace Readiness Assessment (WRA) and Technical Skill Assessment (TSA) exam costs (excluding retakes) for those exams administered outside the Division-funded testing window
5) Web-based licensed products to support program instruction and management
6) Materials and supplies used in CTE program promotion

ii.   Equipment

1) Equipment costing $500 or more per unit cost and having an expected life greater than two years (software is not considered equipment)
2) Computers and peripherals necessary for program instruction above and beyond equipment provided to academic classrooms

iii.   Salaries

1) Time beyond the normal academic year to be defined as the last school session calendar day of the current year and before the first session calendar day of the subsequent year, which should be a documented agreement between the district and the CTE instructor
2) Time during the normal academic year for CTSO advisors who travel and stay in hotels to attend state and national leadership conferences with their students, beyond the normal school week to include one (1) day for a state leadership conference and two (2) days for a national leadership conference
3) For health professions programs only, time beyond the normal school day, i.e., evenings and weekends, for licensed professional teachers delivering required instruction to students at clinical sites

iv.   Contracts

1) Services contracted by the district for maintaining and repairing CTE equipment and for operating and maintaining CTE labs and shops (e.g., equipment service contracts and hazardous waste disposal)
2) Fees and expenses for supplemental specialized instruction (e.g., certified CPR trainer, OSHA certification instructor, short-term specialized instruction from subject matter expert, supplemental staff to supervise students in a clinical environment)

    v.   Travel and Professional Expenses

      1) Instructor travel costs and fees for CTE-related professional development (e.g., conferences, seminars, workshops, state-sponsored meetings, summer conference, and back-to-industry experiences related to the CTE program)

      2) Instructor travel costs and fees related to CTE student activities and CTSO activities (e.g., conference registration fees, mileage, per diem, lodging)

      3) Instructor membership dues for professional associations and CTSO affiliations related to program area.

      4) Up to ten percent (10%) of the CTE added-cost funding for student transportation within the state to a state-approved CTSO leadership conference or event

    vi.   Added-Cost Funds may not be used for:

      1) Print textbooks, electronic textbooks, and/or other electronic media used as the primary source of content delivery

      2) Technology related to general instructional delivery (e.g., projectors, cell phones)

      3) Classroom equipment, supplies, and web-based licensed products that are provided to all district teachers and classrooms

      4) Fundraising equipment and supplies

      5) Equipment not related to program instruction

      6) Salaries and benefits for certified employees (i.e., teachers who hold certification) and classified employees (i.e., employees other than certified or professional teachers)

      7) Salaries and benefits to replace furlough days

      8) Salaries and benefits for district pre-service and/or in-service days

      9) Salaries and benefits for substitutes

      10) Contracted salaries or benefits to provide the basic instructional program

      11) Fees to obtain or renew teaching credentials and/or professional licenses

      12) Tuition and transcripted credits, including professional development credits

      13) Individual student travel fees and expenses

8. Occupational Specialist Certificate Endorsements, effective July 1, 2020. Pursuant to Section 33-1201, Idaho Code, every person employed in an elementary or secondary school in the capacity of a teacher must have a certificate issued under the authority of the State Board of Education. Certification requirements are established in IDAPA 08.02.02. In addition to a certificate, each certificate must have one or more endorsements indicating the occupational area the teacher is qualified in to provide instruction. Endorsement eligibility is determined by the Division of Career Technical Education. Career technical education endorsements consist of the following:

    a. Endorsements A-C

i.   Administrative Services (6-12). Industry experience that indicates applied competence in the majority of the following areas: proficiency in word processing, spreadsheet, database, presentation, and technology media applications; accounting functions; legal and ethical issues that impact business; customer relations; business communication; and business office operations.

ii.   Agribusiness (6-12). Industry experience that indicates applied competence in the majority of the following areas: plant and animal science; agricultural economic principles; business planning and entrepreneurship; agriculture business financial concepts and recordkeeping systems; risk management in agriculture; laws related to agriculture and landowners; marketing and sales plans; and sales.

iii.   Agriculture Food Science and Processing Technologies (6-12). Industry experience that indicates applied competence in the majority of the following areas: properties of food; principles of processing; post-processing operations; safety practices; and equipment and tools used in food processing.

iv.   Agriculture Leadership and Communications (6-12). Industry experience that indicates applied competence in the majority of the following areas: applied communications and leadership through agricultural education; supervised agricultural experience; career opportunities in agricultural science, communications, and leadership; agriculture's impact on society; agricultural science principles; agricultural communication principles; and agricultural leadership principles.

v.   Agriculture Mechanics and Power Systems (6-12). Industry experience that indicates applied competence in the majority of the following areas: safety practices; tools and hardware; metal technology; power systems; electricity; mathematical applications; insulation; and careers in agricultural mechanics and powers systems.

vi.   Animal Science (6-12). Industry experience that indicates applied competence in the majority of the following areas: animal agricultural industries; nutritional requirements for livestock; livestock reproductive systems; principles of evaluation for animal selection; animal welfare, handling, and quality assurance; medication and care; disease transmission and care; harvesting and processing of animal products; and, animal science risk management.

vii.   Apparel/Textiles (6-12).   Industry experience that indicates applied competence in the majority of the following areas: fashion trends; design sketches; color and fabric selection; production of clothing and accessories; and enhancement of function and safety.

viii.   Applied Accounting (6-12). Industry experience that indicates applied competence in the majority of the following areas: accounting functions; accounting ethics; software application packages; financial statements;

asset protection and internal controls; inventory records; long-term assets; and payroll procedures.

ix.   Automated Manufacturing (6-12). Industry experience that indicates applied competence in the majority of the following areas: lab organization and safety practices, blueprint reading, measuring, computer-aided design (CAD); computer-aided manufacturing (CAM), computer numeric control (CNC), fundamental power system principles, manufacturing processes, electronic and instrumentation principles, machining, robotics and materials-handling systems, and additive (3D) printing.

x.   Automotive Collision Repair (6-12). Industry experience that indicates applied competence in the majority of the following areas: auto body collision-repair practices; tools; trade skills in refinishing, welding, and painting.

xi.   Automotive Maintenance & Light Repair (6-12). Industry experience that indicates applied competence in the majority of the following areas: service, maintenance, and repair practices for a wide variety of vehicles; and diagnosing, adjusting, repairing, and replacing individual vehicle components and systems.

xii.   Business Digital Communications (6-12). Industry experience that indicates applied competence in the majority of the following areas: elements and principles of design and visual communications; professional communication skills; editing and proofreading; copyright and intellectual property law; portfolio development; content development strategy; branding and corporate identity; graphic communication production; video editing; web page development; web page design and layout; and web-related planning and organizational standards.

xiii.   Business Management (6-12). Industry experience that indicates applied competence in the majority of the following areas: planning and organizing; directing, controlling and evaluating goals and accomplishments; financial decision-making; competitive analysis and marketing strategies; human resource management; customer relations; technology; project management; operations and inventory; and social responsibility.

xiv.   Cabinetmaking and Bench Carpentry (6-12). Industry experience that indicates applied competence in the majority of the following areas: cabinetmaking and millwork production; cutting, refinishing, installing, and shaping of various materials; knowledge of industry standards and construction applications; hardware; and blueprint reading.

xv.   Certified Welding (6-12). Industry experience that indicates applied competence in the majority of the following areas: fundamental print reading; measurement and layout/fit-up techniques; properties of metals; shielded metal arc welding (SMAW); gas metal arc welding (GMAW and GMAW-S); flux cored arc welding (FCAW-G); gas tungsten arc welding

(GTAW); thermal cutting processes; welding codes; inspection and testing principles; and fabrication techniques.

xvi. Child Development & Services (6-12). Industry experience that indicates applied competence in the majority of the following areas: early childhood-education career paths and opportunities for employment; ethical conduct; advocacy for children; child/human development and learning; family and community relations; child observation, documentation, and assessment; positive relationships and supportive interaction; and approaches, strategies, and tools for early childhood education.

xvii. Commercial Photography (6-12). Industry experience that indicates applied competence in the majority of the following areas: ethics in photography, elements and principles of design composition, cameras and lenses, exposure settings, light sources, digital workflow, presentation techniques and portfolios, and production using industry standard software.

xviii. Computer Support (6-12). Industry experience that indicates applied competence in the majority of the following areas: basic network technologies, laptop support, PC support, printer support, operating systems, security, mobile device support, troubleshooting techniques, and trends in the industry.

xix. Construction Trades Technology (6-12). Industry experience that indicates applied competence in the majority of the following areas: comprehensive knowledge of structural systems and processes, classical and contemporary construction elements, knowledge of industry standards, knowledge of architecture, basic cabinetry and millwork, and blueprint reading.

xx. Cosmetology (6-12). Industry experience that indicates applied competence in the majority of the following areas: hair design; skincare; nail care; industry guidelines and procedures; entrepreneurship; and communications. Instructor must hold a current and valid Idaho license or certificate as a cosmetologist.

xxi. Culinary Arts (6-12). Industry experience that indicates applied competence in the majority of the following areas: experience as a chef in a full-service restaurant; business operations experience in the culinary/catering industry; communication and organization skills with customers and vendors; industry-recognized food safety and sanitation certification; knowledge of proper food handling, ingredients, food quality and control practices; culinary tools and equipment; cooking methods; meal preparation; menu planning principles and industry trends and career options.

b. Endorsements D-N
i. Dental Assisting (6-12). Industry experience that indicates applied competence in the majority of the following areas: dental professions pathways; ethics in dental practice; nutrition as related to oral health;

infection control; occupational safety; dental-related anatomy and pathology; dental anesthesia; dental assisting skills; dental materials; and, dental radiology. Instructor must hold a current and valid Idaho license or certificate as a dental assistant, dental hygienist, or dentist.

ii.   Digital Media Production (6-12). Industry experience that indicates applied competence in the majority of the following areas: graphic design industry structure; elements and principles of design composition; visual communication; industry-standard software production; ethics and graphic design; digital portfolios; mathematical skills as related to design; communication skills; editing and proofreading; video editing; digital media and production; dissemination techniques and methods; broadcasting equipment, camera, and lens operations; light sources; presentation techniques; public speaking; and writing skills.

iii. Drafting and Design (6-12). Industry experience that indicates applied competence in the majority of the following areas: technical drawings, scale drawings, architectural drafting, mechanical drafting, orthographic projection, two- and three-dimensional drawings, manual drafting, and computer aided design.

iv.   Ecology and Natural Resource Management (6-12). Industry experience that indicates applied competence in the majority of the following areas: ecological concepts and scientific principles related to natural resource systems; forest types; forest management components and practices; fire ecology and management; importance and application of GPS/GIS in natural resource management; fish and wildlife ecology; and mineral and energy resources management.

v.   Electrical Technology (6-12). Industry experience that indicates applied competence in the majority of the following areas: digital and solid-state circuits, DC principles, AC concepts, soldering techniques, circuits, and electrician-associated electronic components and tools. Instructor must hold a current and valid Idaho license or certificate as an electrician.

vi.   Electronics Technology (6-12). Industry experience that indicates applied competence in the majority of the following areas: digital and solid-state circuits; DC principles; AC principles; soldering techniques; circuits; digital electronics; electronic circuits; electronic devices; and electronic digital circuitry simulations and associated electronic components and tools.

vii. Emergency Medical Technician (EMT) (6-12). Industry experience that indicates applied competence in the majority of the following areas: fundamental knowledge of the emergency management services (EMS) system; medical and legal/ethical issues in the provision of emergency care; EMS systems workforce safety and wellness; documentation; EMS system communication; therapeutic communication; anatomy and physiology; medical terminology; pathophysiology; and lifespan development (per the EMR and EMT sections of the Idaho EMS Education Standards located on

the Idaho Department of Health and Welfare website). Instructor must have passed the National Registry exam. Instructor must hold a current and valid Idaho EMS license or certificate and be certified as an EMT instructor through Idaho EMS.

viii.   Firefighting (6-12). Industry experience that indicates applied competence in the majority of the following areas: knowledge of local, state, and federal laws and regulations; firefighting procedures; firefighting tactics; firefighting equipment and vehicles; EMT basic training; first aid and CPR training; and reporting requirements under Idaho criminal code. Instructor must hold a current and valid Idaho license or certificate as an EMT and firefighter.

ix.   Graphic Design (6-12). Industry experience that indicates applied competence in the majority of the following areas: the graphic design industry; elements and principles of design and visual communication; production using industry standard software; branding and corporate identity; ethical and legal issues related to graphic design; portfolio development and evaluation; mathematics for visual communications; communication; editing and proofreading; graphic design in digital media; and applied art.

x.   HVAC Technology (6-12). Industry experience that indicates applied competence in technical subjects and skills related to the HVAC trade as approved by the Idaho HVAC Board and the Idaho State Board for Career Technical Education: installing, altering, repairing, and maintaining HVAC systems and equipment including air conditioners, venting or gas supply systems, ductwork, and boilers. Instructor must hold a current and valid Idaho license or certificate as an HVAC Technician.

xi.   Heavy Equipment/Diesel Technology (6-12). Industry experience that indicates applied competence in the majority of the following areas: knowledge of diesel engine service; preliminary inspection; identification and repair of vehicle components; preventative maintenance; and heavy equipment applications.

xii.   Hospitality Management (6-12). Industry experience that indicates applied competence in the majority of the following areas: business structures; economics; human resources; sales and marketing; finance and budgeting; safety and security; legal and ethical considerations; event planning and management; teamwork; communication skills; lodging operations; and food and beverage operations.

xiii.   Hospitality Services (6-12). Industry experience that indicates applied competence in the majority of the following areas: careers in the hospitality and tourism industry; customer service; event planning implementation; procedures applied to safety, security, and environmental issues; practices and skills involved in lodging occupations and travel-related services; and facilities management.

xiv. Industrial Mechanics (6-12). Industry experience that indicates applied competence in the majority of the following areas: industrial mechanics knowledge; shop skills; diagnostic and repair techniques; welding; hydraulic; electronic systems; and maintenance and preventative maintenance.

xv. Journalism (6-12). Industry experience that indicates applied competence in the majority of the following areas: legal and ethical issues related to journalism and photojournalism, principles and techniques of media design, design formats, journalistic writing, social media and digital citizenship, and media leadership.

xvi. Law Enforcement (6-12). Industry experience that indicates applied competence in the majority of the following areas: knowledge of local, state, and federal laws and regulations; defensive strategies; investigative strategies; search principles and strategies; tactical procedures; vehicle operations; knowledge of weapons and use where appropriate; first aid and CPR training; social and psychological sciences; and identification systems.

xvii. Marketing (6-12). Industry experience that indicates applied competence in the majority of the following areas: economic systems; international marketing and trade; ethics; external factors to business; product/service management; pricing; distribution channels; advertising; sales promotion; public relations; retail management; market research and characteristics; digital marketing; and financing and financial analysis.

xviii. Medical Assisting (6-12). Industry experience that indicates applied competence in the majority of the following areas: human anatomy, physiology and pathology, medical terminology, pharmacology, clinical and diagnostic procedures, medication administration, patient relations, medical law and ethics, scheduling, records management, and health insurance. Instructor must hold a current and valid medical assistant certification as evidenced in the national registry.

xix. Networking Support (6-12). Industry experience that indicates applied competence in the majority of the following areas: PC hardware configuration, fundamental networking technologies, operating systems, basic networking, basic security, and basic network configurations.

xx. Nursing Assistant (6-12). Industry experience that indicates applied competence in the majority of the following areas: scope of practice; ethics and legal issues; communication and interpersonal relationships; documentation; care practices; infection prevention; human anatomy and physiology; medical terminology; personal care procedures; physiological measurements; nutritional requirements and techniques; procedures and processes related to elimination; quality patient environment; patient mobility; admission, transfer, and discharge procedures; care of residents with complex needs; and safety and emergency. Instructor must hold a current and valid Idaho registered nursing license, and be approved as a

certified CNA primary instructor through Idaho Department of Health and Welfare.

c. Endorsements O-W
   i. Ornamental Horticulture (6-12). Industry experience that indicates applied competence in the majority of the following areas: safety practices; plant anatomy; plant physiology; plants identification skills; growing media; plant nutrition; integrated pest management; plant propagation; ornamental horticulture crops; business concepts; plant technologies; ornamental design standards; and career opportunities in ornamental horticulture.
   ii. Pharmacy Technician (6-12). Industry experience that indicates applied competence in the majority of the following areas: patient profile establishment and maintenance; insurance claim preparation; third-party insurance provider correspondence; prescription and over-the-counter medications stocking and inventorying; equipment and supplies maintenance and cleaning; and cash register operation. Instructor must be a pharmacist, registered nurse, or pharmacy technician holding a current and valid Idaho license or certification.
   iii. Plant and Soil (6-12). Industry experience that indicates applied competence in the majority of the following areas: plant anatomy and identification; plant processes, growth, and development; soil and water; plant nutrition; integrated pest management; careers and technology; and safety.
   iv. Plumbing Technology (6-12). Industry experience that indicates applied competence in technical subjects and skills related to the plumbing trade as approved by the Idaho Plumbing Board and the Idaho Board for Career Technical Education: repairing, installing, altering, and maintaining plumbing systems and fixtures including interconnecting system pipes and traps, water drainage, water supply systems, and liquid waste/sewer facilities. Instructor must hold a current and valid Idaho license or certificate as a plumber.
   v. Pre-Engineering Technology (6-12). Industry experience that indicates applied competence in the majority of the following areas: lab safety; impacts of engineering; ethics of engineering; design process; documentation; technical drawing; 3D modeling; material science; power systems; basic energy principles; statistics; and kinematic principles.
   vi. Precision Machining (6-12). Industry experience applied the majority of the following areas: precision machining practices; tools used to shape parts for machines; industrial mechanics; shop skills; safety in practice; blueprint reading; and diagnostic and repair techniques.
   vii. Programming & Software Development (6-12). Industry experience that indicates applied competence in the majority of the following areas: basic programming principles; problem solving; programming logic; validation;

viii. Rehabilitation Services (6-12). Industry experience that indicates applied competence in the majority of the following areas: ethical, legal, and professional responsibilities; medical terminology; anatomy and physiology; roles and responsibilities of the rehabilitation team; patient care skills; therapeutic interventions; and common pathologies. Instructor must be a health professional holding a current and valid Idaho license or certificate in his/her field of study.

ix. Small Engine Repair/Power Sports (6-12). Industry experience that indicates applied competence in the majority of the following areas: small gasoline engine construction and performance; industry-related resources; equipment used to diagnose and troubleshoot issues; repair; entrepreneurship; and customer service.

x. Web Design and Development (6-12). Industry experience that indicates applied competence in the majority of the following areas: web page development, web page design and layout, integration of web pages, web planning and organizational standards, and web marketing.

xi. Work-Based Learning (6-12). Educators assigned to coordinate approved work-based experiences must hold this endorsement. Applicants must hold an occupational endorsement on the Degree Based Career Technical Certificate or Occupational Specialist Certificate, and complete coursework in coordination of work-based learning programs.

d. The following career technical education endorsements awarded prior to July 1, 2020 shall be grandfathered and shall not be awarded after July 1, 2020:

i. Agricultural Business Management (6-12)
ii. Agricultural Power Machinery (6-12)
iii. Agricultural Production (6-12)
iv. Animal Health and Veterinary Science (6-12)
v. Aquaculture (6-12)
vi. Business Management/Finance (6-12)
vii. Child Development Care and Guidance (6-12)
viii. Culinary Arts (6-12)
ix. Dietitian (6-12)
x. Farm and Ranch Management (6-12)
xi. Fashion and Interiors (6-12)
xii. Food Service (6-12)
xiii. Forestry (6-12)
xiv. Horticulture (6-12)
xv. Information/Communication Technology (6-12)

    xvi.   Microcomputer Applications (6-12)
    xvii.   Natural Resource Management (6-12)
    xviii. Orientation to Health Professions (6-12)

9. Postsecondary Programs

    a. Postsecondary Programs are provided through the state system of six (6) regional technical colleges. Postsecondary programs are defined in Board Policy III.E and are reviewed by the Administrator. In accordance with Board Policy III.G., the Administrator shall meet with the Technical College Leadership Council (TCLC) on a regular basis. The regional technical colleges are:

      i.   College of Western Idaho (Nampa)
      ii.   College of Southern Idaho (Twin Falls)
      iii. College of Eastern Idaho (Idaho Falls)
      iv. Idaho State University College of Technology (Pocatello)
      v.   Lewis-Clark State College (Lewiston)
      vi. North Idaho College (Coeur d'Alene)

    b. Workforce Training Programs are primarily provided through the six (6) regional technical colleges to provide upgrading and retraining programs for persons in the work force and to support regional industry needs. These offerings range from brief seminar classes to intensive courses which normally are fewer than 500 hours of annual instruction.

10. The Idaho Agricultural Education Quality Program Standards shall be used to evaluate the quality of Agricultural, Food and Natural Resource education programs. The Idaho Agricultural Education Quality Program Standards as approved August 14, 2014, are adopted and incorporated by reference into this policy. The standards may be found on the Division of Career Technical Education website at http://cte.idaho.gov.

11. Internal Policies and Procedures

The chief executive officer may establish additional policies and procedures for the internal management of the Division of Career Technical Education that complement, but do not supplant, the Governing Policies and Procedures of the Board. Such internal policies and procedures are subject to Board review and action.

12. Industry Partner Fund

In an effort to increase the capacity of each of Idaho's six public technical colleges to work with regional industry partners to provide a "rapid response to gaps in skills and abilities," Idaho has established the Industry Partner Fund. The purpose of the fund is to provide funds that give the technical colleges the flexibility to work with Idaho employers to provide "timely access to relevant college credit and non-credit training and support projects."

a. Industry Partner Fund Definitions:

    i. Technical College Leadership Council (TCLC) means the career technical education deans of Idaho's six public technical colleges

    ii. Wage threshold means evidence that training will lead to jobs that provide living wages appropriate to the local labor market or local standard of living.

    iii. Regional means the six defined career technical service regions pursuant to Board Policy III.Z.

    iv. Support project means supplemental items, activities, or components that may enhance program outcomes (such as job analysis, placement services, data collection and follow up, workplace readiness skills training, etc.)

    v. Regional industry partners means employers that operate in Idaho and/or serve as a talent pipeline for Idaho students and employees.

    vi. Impact potential means the extent to which the training or project will increase regional capacity to meet talent pipeline needs. May include number of students or employees affected, associated wages, and long-term regional improvement or sustainability. May also include the timeframe for implementation.

    vii. Demonstrated commitment means the promissory financial commitment made by the partner employer that includes cash or in-kind contribution to the project.

b. Roles and Responsibilities

The Administrator and TCLC are jointly responsible for reviewing and administering the application process for accessing Industry Partner Fund monies.

The TCLC, in accordance with the deadlines outlined in the following section, shall conduct the preliminary review of all proposals to ensure they meet the eligibility requirements and align with legislative intent. Each institution shall have one vote on the TCLC throughout the recommendation process. Deans shall not vote on proposals from their institution. The TCLC shall make recommendations to the division administrator to approve, deny, or modify submitted proposals.

The Administrator shall review all eligible proposals and make the final determination on the award of those proposals.

The Division shall be responsible for management and distribution of all moneys associated with the fund.

c. Submission and Review Process
Proposals will be accepted quarterly, on a schedule set by the Division. The TCLC shall provide the Administrator with recommendations on which proposals to award within 14 calendar days of the closing date of the application period. Pursuant to language outlined in Section 33-2213, Idaho Code, the TCLC and the

Administrator will notify the technical college within 30 days of submission of their proposal as to whether their proposal was approved.

Submitted proposals must contain all required supporting documentation, as outlined by the Administrator, the TCLC, and as specified in the application.

Proposals must be signed by the College Dean, Financial Vice President/Chief Fiscal Officer, Provost/Vice President for Instruction, and institution President.

Proposals must outline how the institution and industry partner(s) are unable to meet industry need with existing resources.

d. Eligibility Criteria

Each proposal will be reviewed and evaluated according to the following criteria:
   i.   The extent to which the proposal meets regional demand
   ii. Relevant labor market information, which must include, but is not limited to, Idaho Short Term Projections (Idaho Department of Labor)
   iii. Wage thresholds – low wage program starts should be accompanied with appropriate justification including regional economic demand.
   iv. Impact potential
   v.   Degree of employer commitment
   vi. The extent to which the proposal aligns with and/or supports career technical education programs and relevant workforce training
   vii. the anticipated administrative costs
   viii. any special populations that may benefit from the proposed education or training
   ix. sustainability of the program

Preference will be given to proposals that include:
   i.   Multiple employers
   ii. Higher number of impacted workers
   iii. Demonstrated commitment (highest consideration will be given to proposals with a matching component)

Each college may submit more than one proposal per quarter. In the event a qualified proposal isn't selected in the quarter in which it was submitted, the proposal may be resubmitted the following quarter. Resubmission of an eligible proposal is not a guarantee of future awards.

e. Distribution and Use of Funds
The Administrator, in awarding funds, shall ensure that funds are available each quarter. As such, the Administrator may adjust or reduce the award amount to an accepted proposal. These adjustments or reductions shall be made in consultation with the TCLC and the technical college impacted and will ensure the original intent of the proposal can still be met.

Funds will be distributed on a one-time basis; renewal proposals may be submitted, based on the nature of the project or training.

Industry Partner Fund moneys may be used for:
  i.   Facility improvement/expansion
  ii.   Facility leasing
  iii. Curriculum development
  iv.   Salaries and benefits (if the training program needs are anticipated to go beyond the initial award, the college must provide additional details on long-term sustainability of the position filled through the fund)
  v.   Staff development
  vi.   Operating expenses
  vii. Equipment and supplies
  viii. Travel related to the project
  ix.   Approved administrative costs, as outlined in the application

Funds may not be used for:
  i.   Real property
  ii.   indirect costs
  iii. the cost of transcribing credits
  iv.   tuition and fees
  v.   materials and equipment normally owned by a student or employee for use in the program or training

f.   Performance Measures and Reporting Requirements
    In accordance with the approved proposal, colleges shall provide a quarterly update and closeout report on elements such as:
      i.   Number of affected workers
      ii.   Number of enrolled or participating students
      iii. Placement rate of training completers
      iv.   Average wages and any wage differential
      v.   Industry match
      vi.   If practicable, Idaho public college credits, certificates, certifications, qualifications or micro certifications of value toward postsecondary certificates or degrees.
      vii. Funds obligated and expended. Any funds not obligated within 18 months of the initial award shall revert back to the fund.

SUBJECT
    Legislative Ideas – 2021 Legislative Session

REFERENCE
June 2019	Board approved thirteen (13) legislative ideas to be submitted through the Executive Agency Legislative process.
August 2019	Board approved five (5) pieces of legislation move forward through the Executive Agency Legislative process.
June 2020	Board approved nine (9) legislative ideas and authorized the Executive Director to add additional proposals identified prior to the legislative idea submittal deadline.

BACKGROUND/ DISCUSSION
    The State Board of Education's legislative process starts with the approval of legislative ideas. Legislative ideas that are approved by the Board are submitted electronically to the Division of Financial Management (DFM) through the Executive Agency Legislative process. A legislative idea consists of a statement of purpose and fiscal impact. If approved by the Board, the actual legislative language is brought back to the Board for final approval (typically the regular August Board meeting) prior to submittal to the legislature for consideration during the 2021 Legislative Session. Legislative ideas submitted to DFM are forwarded to the Governor for consideration then to the Legislative Services Office for processing and submittal to the Legislature.

    In accordance with the Board's Master Planning Calendar, legislative ideas from the institutions and agencies must be submitted for the Board's consideration by the June Board meeting deadlines. One additional legislative idea was submitted by the community colleges following Board consideration at the June 2020 Regular Board meeting. Using the authority granted to the Executive Director at the June 2020 Regular Board meeting, this legislative idea was included in the legislative ideas submitted to DFM through the Executive Agency Legislative process.

    The following legislative ideas were approved by the Governor's Office to move forward as legislation:

    Legislative Ideas Approved June 10, 2020
    1. Amend Section 33-1001, Idaho Code – definitions related to the Career Ladder
    2. Amend Section 33-1201A, Idaho Code – clarify compact reference, "compact state other than Idaho" for endorsements tied to the Career Ladder
    3. Literacy Intervention – amend existing literacy intervention statutory requirements to move to a single chapter of Idaho Code and update language based on Our Kids, Idaho's Future Task Force recommendations

    Legislative Idea Submitted After June 10 meeting
    4. Community College Tuition Cap – remove maximum dollar amount and lower maximum annual percentage increase.

The first two legislative ideas will be combined into a single piece of legislation and are provided in Attachment 2. The third legislative idea is a new chapter that combines existing sections of Idaho Code specific to literacy intervention. This legislation is provided in Attachment 3. To help identify those sections that are existing provisions and being moved and provisions that are new, the new provisions are highlighted in yellow. Provisions that are not being moved with the sections they are currently in and are being added to different sections are struck through and then highlighted in blue.

IMPACT

Legislation approved by the Board will be submitted through the Executive Agency Legislative Process for the next part of the review processes. The legislation will then be reviewed by the Governor's Office and DFM. Those pieces that are approved will then be submitted to the Legislative Services Office for final drafting and forwarding to the legislature for consideration during the 2021 Legislative Session.

ATTACHMENTS

Attachment 1 – Legislative Ideas – Statement of Purpose and Fiscal Impact – Summary
Attachment 2 – Career Ladder Clarification
Attachment 3 – Literacy Intervention Consolidation
Attachment 4 – Community College Tuition Cap

STAFF COMMENTS AND RECOMMENDATIONS

This is the stage of the legislative process when the Board considers approval of the actual legislative language. If approved, the language is submitted to DFM for the Governor's consideration and then submittal to the Legislative Services Office for the language to be converted into a proposed bill. During this last phase of the process, non-substantive changes may be made as staff work with the Governor's Office and Legislative Services on final bill drafting.

Attachment 1 provides a brief summary of each piece of legislation and the estimated fiscal impact.

Staff recommends approval.

BOARD ACTION

I move to approve the proposed legislation in substantial conformance to the form provided in Attachments 2 through 4 and to authorize the Executive Director to make additional changes as necessary as the legislation moves forward through the legislative process.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

LEGISLATIVE IDEAS - SUMMARY

1. Career Ladder Definitions and Endorsements

Statement of Purpose
Section 33-1001, Idaho Code, includes a definition of "Salary Schedule." This definition includes a reference to a minimum amount on a local district salary schedule. This language has caused confusion due to the conflict with the language in Section 33-1004E, Idaho Code, regarding minimum salaries that must be paid for full time equivalent positions. The legislation would update the definition of salary schedule to align with the minimum compensation language. Additionally, Section 33-1201A, Idaho Code, was amended to provide for a streamlined process for instructional staff coming from out-of-state to be placed on the Career Ladder. This processes used existing language regarding individuals coming from a compact member state. This legislation would provide clarification that it would be coming from a compact member state other than Idaho.

Fiscal Impact
There would be no fiscal impact. Section 33-1004B, Idaho Code sets out how salary based apportionment for instructional staff and pupil service staff is calculated regardless of the amounts paid out at the local level. HB 523 (2020) clearly established minimum amounts that must be paid and the time frame those minimums take effect. These new minimums are tied to the amounts used in the calculation for the applicable years. Likewise, the amendments to Section 33-1201A, Idaho Code, would have no fiscal impact. These amendments would provide clarification in alignment with the original intent and will not change practice.

2. Literacy Intervention

Statement of Purpose
The purpose of this legislation would be to consolidate the current statutory requirements for literacy intervention into a single chapter and to update provisions in alignment with the Task Force recommendation for focusing more on the importance of having every student reading at grade level by the end of grade 3.

Fiscal Impact
There would be no fiscal impact. Funding is currently appropriated for the purpose of increasing literacy intervention for students in kindergarten through grade 3.

3. Community College Tuition Cap

Statement of Purpose
The proposed legislation would amend Section 33-2110, Idaho Code, removing the maximum tuition cap allowed to be charged by Community Colleges. Currently, code limits Community Colleges to a maximum tuition of $2,500 per annum, which equates to an effective per credit cost of $104.17. This cap was last amended in 2008. Removing the tuition cap will allow the elected Boards of Trustees for each community college

continue to determine tuition levels in relation to locally levied property taxes and state support to adequately fund and deliver quality higher education at each college. Additionally, the current code allows for a maximum of increase of 10%, while the proposed change reduces the annual allowable increase to a maximum of 5% per year.

Fiscal Impact
The proposed amendments would remove the tuition cap, established by the legislature in 1963, that can be collected by community colleges. Without the amendment, community colleges will require additional state funding and/or the increase of local taxing district support to fund operations. The current average tuition rate for Idaho community colleges is $100.40 per credit. Serving over 14,811 FTE in the 2018-2019 academic year, a one percent increase in tuition would generate $355,464 in additional tuition revenue for Idaho community colleges.

Be It Enacted by the Legislature of the State of Idaho:

SECTION 1. That Section 33-1001, Idaho Code, be, and the same is hereby amended to read as follows:

33-1001. DEFINITIONS. As used in this chapter:
(1) "Administrative schools" means and applies to all elementary schools and kindergartens within a district that are situated ten (10) miles or less from both the other elementary schools and the principal administrative office of the district and all secondary schools within a district that are situated fifteen (15) miles or less from other secondary schools of the district.
(2) "Administrative staff" means those who hold an administrator certificate and are employed as a superintendent, an elementary or secondary school principal, or are assigned administrative duties over and above those commonly assigned to teachers.
(3) "At-risk student" means a student in grades 6 through 12 who:
(a) Meets at least three (3) of the following criteria:
(i)   Has repeated at least one (1) grade;
(ii) Has absenteeism greater than ten percent (10%) during the preceding semester;
(iii) Has an overall grade point average less than 1.5 on a 4.0 scale prior to enrolling in an alternative secondary program;
(iv) Has failed one (1) or more academic subjects in the past year;
(v)   Is below proficient, based on local criteria, standardized tests, or both;
(vi) Is two (2) or more credits per year behind the rate required to graduate or for grade promotion; or
(vii) Has attended three (3) or more schools within the previous two (2) years, not including dual enrollment; or
(b) Meets any of the following criteria:
(i)   Has documented substance abuse or a pattern of substance abuse;
(ii) Is pregnant or a parent;
(iii) Is an emancipated youth or unaccompanied youth;
(iv) Is a previous dropout;
(v)   Has a serious personal, emotional, or medical issue or issues;
(vi) Has a court or agency referral; or
(vii) Demonstrates behavior detrimental to the student's academic progress.
(4) "Average daily attendance" or "pupils in average daily attendance" means the aggregate number of days enrolled students are present, divided by the number of days of school in the reporting period; provided, however, that students for whom no Idaho school district is a home district shall not be considered in such computation.
(5) "Career ladder" means the compensation table used for determining the allocations districts receive for instructional staff and pupil service staff based on specific performance criteria and is

made up of a residency compensation rung and a professional compensation rung.

(6) "Child with a disability" means a child evaluated as having an intellectual disability, a hearing loss including deafness, a speech or language impairment, a visual impairment including blindness, an emotional behavioral disorder, an orthopedic impairment, autism, a traumatic brain injury, another health impairment, a specific learning disability, deaf-blindness, or multiple disabilities, and who, by reason thereof, needs special education and related services.

(7) "Compensation rung" means the rung on the career ladder that corresponds with the compensation level performance criteria.

(8) "Economically disadvantaged student" means a student who:

(a) Is eligible for a free or reduced-price lunch under the Richard B. Russell national school lunch act, 42 U.S.C. 1751 et seq., excluding students who are only eligible through a school's community eligibility program;

(b) Resides with a family receiving assistance under the program of block grants to states for temporary assistance for needy families (TANF) established under part A of title IV of the social security act, 42 U.S.C. 601 et seq.;

(c) Is eligible to receive medical assistance under the medicaid program under title XIX of the social security act, 42 U.S.C. 1396 et seq.; or

(d) Is considered homeless for purposes of the federal McKinney-Vento homeless assistance act, 42 U.S.C. 11301 et seq.

(9) "Elementary grades" or "elementary average daily attendance" means and applies to students enrolled in grades 1 through 6, inclusive, or any combination thereof.

(10) "Elementary schools" are schools that serve grades 1 through 6, inclusive, or any combination thereof.

(11) "Elementary/secondary schools" are schools that serve grades 1 through 12, inclusive, or any combination thereof.

(12) "English language learner" or "ELL" means a student who does not score proficient on the English language development assessment established by rule of the state board of education.

(13) "Gifted and talented" shall have the same meaning as provided in section 33-2001(4), Idaho Code.

(14) "Homebound student" means any student who would normally and regularly attend school, but is confined to home or hospital because of an illness or accident for a period of ten (10) or more consecutive days.

(15) "Instructional staff" means those who hold an Idaho certificate issued under section 33-1201, Idaho Code, and who are either involved in the direct instruction of a student or group of students or who serve in a mentor or teacher leader position for individuals who hold an Idaho certificate issued under section 33-1201, Idaho Code.

(16) "Kindergarten" or "kindergarten average daily attendance" means and applies to all students enrolled in a school year, less than a school year, or summer kindergarten program.

(17) "Local salary schedule" means a compensation table adopted by a school district or public charter school, which table is used for determining moneys to be distributed for instructional staff and pupil service staff salaries. Minimum compensation provided under a local salary schedule shall be at least equal to ~~thirty-eight thousand five hundred dollars ($38,500) or, for staff holding a professional endorsement, forty-two thousand five hundred dollars ($42,500)~~ the minimum amounts established pursuant to Section 33-1004E, Idaho Code.

(18) "Measurable student achievement" means the measurement of student academic achievement or growth within a given interval of instruction for those students who have been enrolled in and attended eighty percent (80%) of the interval of instruction. Measures and targets shall be chosen at the school level in collaboration with the staff member impacted by the measures and applicable district staff and approved at the district level. The most effective measures and targets are those generated as close to the actual work as possible. Targets may be based on grade- or department-level achievement or growth goals that create collaboration within groups. Assessment tools that may be used for measuring student achievement and growth include:
(a) Idaho standards achievement test;
(b) Student learning objectives;
(c) Formative assessments;
(d) Teacher-constructed assessments of student growth;
(e) Pre- and post-tests;
(f) Performance-based assessments;
(g) Idaho reading indicator;
(h) College entrance exams or preliminary college entrance exams such as PSAT, SAT and ACT;
(i) District-adopted assessment;
(j) End-of-course exams;
(k) Advanced placement exams; and
(l) Career technical exams.

(19) "Performance criteria" means the standards specified for instructional staff and pupil service staff to demonstrate teaching proficiency for a given compensation rung. Each element of the professional compensation rung and advanced professional compensation rung performance criteria, as identified in this section and as applicable to a staff member's position, shall be documented, reported, and subject to review for determining movement on the career ladder.

(20)(a) "Professional compensation rung performance criteria" means:
(i) An overall rating of proficient or higher, and no components rated as unsatisfactory, on the state framework for teaching evaluation; and
(ii) Demonstrating the majority of students have met measurable student achievement targets or student success indicator targets.
(b) "Advanced professional compensation rung performance criteria" means:
(i) An overall rating of proficient or higher, no components rated as unsatisfactory or basic, and rated as distinguished overall in domain two — classroom environment, or domain three — instruction and

use of assessment, on the state framework for teaching evaluation or equivalent for pupil service staff; and

(ii) Demonstrating seventy-five percent (75%) or more of their students have met their measurable student achievement targets or student success indicator targets.

(21) "Public school district" or "school district" or "district" means any public school district organized under the laws of this state, including specially chartered school districts.

(22) "Pupil service staff" means those who provide services to students but are not involved in direct instruction of those students, and hold a pupil personnel services certificate.

(23) "Secondary grades" or "secondary average daily attendance" means and applies to students enrolled in grades 7 through 12, inclusive, or any combination thereof.

(24) "Secondary schools" are schools that serve grades 7 through 12, inclusive, or any combination thereof.

(25) "Separate elementary school" means an elementary school located more than ten (10) miles on an all-weather road from both the nearest elementary school and elementary/secondary school serving like grades within the same school district and from the location of the office of the superintendent of schools of such district, or from the office of the chief administrative officer of such district if the district employs no superintendent of schools.

(26) "Separate kindergarten" means a kindergarten located more than ten (10) miles on an all-weather road from both the nearest kindergarten school within the same school district and from the location of the office of the superintendent of schools of such district, or from the office of the chief administrative officer of such district if the district employs no superintendent of schools.

(27) "Separate secondary school" means any secondary school located more than fifteen (15) miles on an all-weather road from any other secondary school and elementary/secondary school serving like grades operated by the district.

(28) "Special education" means specially designed instruction or speech/language therapy at no cost to the parent to meet the unique needs of a student who is a child with a disability, including instruction in the classroom, the home, hospitals, institutions, and other settings; instruction in physical education; speech therapy and language therapy; transition services; travel training; assistive technology services; and vocational education.

(29) "Student success indicators" means measurable indicators of student achievement or growth, other than academic, within a predefined interval of time for a specified group of students. Measures and targets shall be chosen at the district or school level in collaboration with the pupil service staff member impacted by the measures and applicable district staff. Student success indicators include:

(a) Quantifiable goals stated in a student's 504 plan or individualized education plan.

(b) Quantifiable goals stated in a student's behavior improvement plan.

(c) School- or district-identified measurable student objectives for a specified student group or population.

(30) "Support program" means the educational support program as described in section 33-1002, Idaho Code, the transportation support program described in section 33-1006, Idaho Code, and the exceptional education support program as described in section 33-1007, Idaho Code.

(31) "Support unit" means a function of average daily attendance used in the calculations to determine financial support provided to the public school districts.

(32) "Teacher" means any person employed in a teaching, instructional, supervisory, educational administrative or educational and scientific capacity in any school district. In case of doubt, the state board of education shall determine whether any person employed requires certification as a teacher.

SECTION 2. That Section 33-1201A, Idaho Code, be, and the same is hereby amended to read as follows:

33-1201A. IDAHO PROFESSIONAL ENDORSEMENT — ELIGIBILITY. (1) Any instructional staff employee or any pupil service staff employee will receive mentoring as outlined in such employee's individualized professional learning plan during the initial three (3) years of holding such certificate. Upon holding a certificate for three (3) years, any such instructional staff or pupil service staff employee may apply for an Idaho professional endorsement. Upon holding a professional endorsement for five (5) years or more, any such instructional staff or pupil service staff employee may apply for an Idaho advanced professional endorsement.

(2) To be eligible for an Idaho professional endorsement, the instructional staff or pupil service staff employee must:

(a) Have held a certificate for at least three (3) years, or have completed a state board of education-approved interim certificate of three (3) years or longer;

(b) Show they met the professional compensation rung performance criteria for two (2) of the three (3) previous years or the third year;

(c) Have a written recommendation from the employing school district; and

(d) Have an annual individualized professional learning plan developed in conjunction with the employee's school district supervisor.

Instructional staff employees may provide additional evidence demonstrating effective teaching that may be considered in exceptional cases for purposes of determining proficiency and student achievement in the event required standards for professional endorsement are not met. Pupil service staff employees may provide additional evidence demonstrating effective student achievement or success that may be considered in exceptional cases for purposes of determining

proficiency and student achievement or success in the event required standards for professional endorsement are not met.

(3) To be eligible for an Idaho advanced professional endorsement, the instructional staff or pupil service staff employee must:

(a) Have held a renewable certificate for at least eight (8) years or more, or have completed a state board of education-approved interim certificate of three (3) years or longer and held a renewable certificate for five (5) years or more;

(b) Show they met the professional compensation rung performance criteria for four (4) of the five (5) previous years or the third, fourth, and fifth year;

(c) During three (3) of the previous five (5) years, have served in an additional building or district leadership role in an Idaho public school, including but not limited to:

(i) Instructional specialist or instructional coach;

(ii) Mentor;

(iii) Curriculum or assessment committee member;

(iv) Team or committee leadership position;

(v) Data coach; or

(vi) Other leadership positions identified by the school district;

(d) Have a written recommendation from the employing school district;

(e) Have an annual individualized professional learning plan developed in conjunction with the employee's supervisor and a self-evaluation; and

(f)(i) Effective July 1, 2020, through June 30, 2021, show they have met the advanced professional compensation rung performance criteria for three (3) of the five (5) previous years or the fifth year;

(ii) Effective July 1, 2021, through June 30, 2022, show they have met the advanced professional compensation rung performance criteria for three (3) of the five (5) previous years or the fourth and fifth year; or

(iii) Effective July 1, 2022, show they have met the advanced professional compensation rung performance criteria for three (3) of the five (5) previous years.

Instructional staff employees may provide additional evidence demonstrating effective teaching that may be considered in exceptional cases for purposes of determining proficiency and student achievement in the event required standards for the advanced professional endorsement are not met. Pupil service staff employees may provide additional evidence demonstrating effective student achievement or success that may be considered in exceptional cases for purposes of determining proficiency and student achievement or success in the event required standards for the advanced professional endorsement are not met.

(4) Instructional staff and pupil service staff who have been certified in another state and have not previously held certification in the state of Idaho shall be eligible for the professional endorsement if they:

(a) Have a written recommendation from the employing school district;

(b) Have worked in a certificated position in a compact-member, other than Idaho, state pursuant to section 33-4101~~4~~, Idaho Code; and
(c) Would have been eligible to work in a certificated position in an Idaho public school based on that certification for three (3) to eight (8) years.

(5) Instructional staff and pupil service staff shall be eligible for the advanced professional endorsement if they:
(a) Have a written recommendation from the employing school district;
(b) Have worked in a certificated position in a compact-member state, other than Idaho, pursuant to section 33-4101~~4~~, Idaho Code; and
(c) Would have been eligible to work in a certificated position in an Idaho public school based on that certification for nine (9) years or more.

(6) The state board of education shall promulgate rules implementing the provisions of this section.

(7) For the purposes of this section:
(a) "Certificate" means an Idaho instructional certificate, pupil service staff certificate, or out-of-state educator certificate that meets the requirements for reciprocity under rules promulgated by the state board of education;
(b) In conjunction with the Idaho evaluation framework, "individualized professional learning plan" means an individualized professional development plan based on the Idaho framework for teaching evaluation and includes, at a minimum, identified interventions based on the individual's strengths and areas of needed growth, how the individual will set student achievement and growth goals, areas of identified professional development and mentoring that target continuous improvement in professional areas, future student achievement, and school building or district culture;
(c) "Instructional staff" means those involved in the direct instruction of a student or group of students and who hold a certificate issued under section 33-1201, Idaho Code;
(d) "Pupil service staff" means those who provide services to students but are not involved in direct instruction of those students and who hold a certificate issued under section 33-1201, Idaho Code; and
(e) "School district" means a school district or a public charter school.

Section 3: An emergency existing therefor, which emergency is hereby declared to exist, this act shall be in full force and effect on and after its passage and approval.

Be It Enacted by the Legislature of the State of Idaho:

SECTION 1. That Title 33, Idaho Code, be, and the same is hereby amended by the addition thereto of a NEW CHAPTER, to be known and designated as Chapter 18, Title 33, Idaho Code, and to read as follows:

CHAPTER 18
Idaho Literacy Achievement and Accountability Act

33-1801. SHORT TITLE. This ACT shall be known and may be cited as the "Idaho Literacy Achievement and Accountability Act"

33-1802. DEFINITIONS. As used in this chapter:
(1) Idaho Comprehensive Literacy Plan means the State Board of Education approved evidence-based plan outlining minimum statewide literacy comprehension expectations and framework. This plan will include details on data literacy, the statewide reading assessment, and best practices.
(2) Local Education Agency or LEA means a school district, including chartered school districts or charter school identified as an LEA pursuant to chapter 52, title 33.
(3) Statewide reading assessment means the State Board of Education approved assessment for facilitating continuous improvement and tailoring student-level instruction and providing summative results.

33-1803. LITERACY AS FOUNDATION FOR THOROUGHNESS. Pursuant to Section 1, Article IX, and the state constitutional duty to establish and maintain a general, uniform and thorough system of public, free common schools, the legislature finds, ensuring that all students have access through the public schools to evidence-based reading instruction and interventions focused on developing the foundational reading skills of phonemic awareness, phonics, fluency, vocabulary, and text comprehension are significant components of ensuring that the system of public schools throughout the state is uniform and thorough. In exercising its duty of general supervision and governance of the public schools of the state, it is appropriate that the state board of education, supported by the department of education, hold local education providers accountable for demonstrating that the reading instruction they provide is focused on these foundational reading skills.

33-1804. IDAHO COMPREHENSIVE LITERACY PLAN. (1) The state board of education shall develop an Idaho comprehensive literacy plan designed to create a framework for all students to be proficient in literacy and prepared to read and learn in the next grade level, as applicable to the student's grade. The comprehensive literacy plan shall be evidence-based and include the identification of best practices for literacy development and interventions.
(2) The state board of education shall convene a group of education stakeholders consisting of, at a minimum, representation from the Idaho public-school system and postsecondary education system with experience

in literacy development and reading instruction, and parents to review and make recommendations to the state board of education on updates to the Idaho comprehensive literacy plan. The comprehensive literacy plan shall be reviewed and updated at no less than five (5) year intervals.
    (3)   The comprehensive literacy plan shall:
    (a)   Identify the state's strategy to ensure students develop strong literacy skills needed for future learning;
    (b)   Set expectations for LEA-level leadership collaboration, professional development for staff, effective instruction and interventions, and the use of assessments and data for setting locally established student proficiency and growth targets; and
    (c)   Identify evidence-based practices and tools aligned to the comprehensive literacy plan.

    33-1805. STUDENT READING INSTRUCTION AND INTERVENTION. (1) It is the ultimate goal of the legislature that every student read at or above grade level by the end of grade 3. School districts shall offer a reading intervention program pursuant to section 33-1806, Idaho Code, to each kindergarten through grade 3 student who exhibits a reading deficiency on the statewide reading assessment pursuant to section 33-1805, Idaho Code, to ensure students can read at or above grade level at the end of grade 3. The reading intervention program shall be provided in addition to core reading instruction that is provided to all students in the general education classroom and must be in alignment with the Idaho comprehensive literacy plan. The reading intervention program shall:
    (a)   Be provided to all kindergarten through grade 3 students identified with a reading deficiency as determined by the statewide reading assessments;
    (b)   Provide intensive development in phonemic awareness, phonics, fluency, vocabulary and text comprehension, as applicable to the grade level; and
    (c)   Monitor the reading progress of each student's reading skills throughout the school year and adjust instruction according to student needs. Monitoring may include both local and statewide assessments.
    (2)   Reading Improvement Plan. Any student in kindergarten through grade 3 who exhibits a deficiency in reading at any time based upon the statewide assessment shall receive an individual reading improvement plan no later than thirty (30) days after the identification of the reading deficiency. The reading improvement plan shall be created by the teacher, principal, other pertinent school personnel, including staff-assigned library duties if applicable, and the parent(s) or guardian(s) and shall describe the reading intervention services the student will receive to remedy the reading deficit. Each student must receive intensive reading intervention until the student is determined to be proficient in reading for their grade level.
    (a)   Having made a good faith effort, should the school be unable to engage the parent or guardian in the development of the student's reading improvement plan within fifteen (15) days of notifying the parent, the school may move forward with the creation of the student's reading improvement plan without parental participation.

(b)   Any student who has been identified as not proficient through a local literacy assessment may also be put on a reading improvement plan.

(c)   Students who are on a reading improvement plan and have been identified through the statewide assessment to be at grade level may be transitioned off of the reading improvement plan. Schools must notify the parents or guardians in advance of transitioning students off of their reading improvement plan.

(3) Parent Notification. The parent of any student in kindergarten through grade 3 who exhibits a deficiency in reading at any time during the school year must be notified in writing of the reading deficiency. The school district shall assist schools with providing written notification to the parent of any student who has not met grade-level proficiency.

(a) The initial notification must include the following:

(i) A statement that his or her student has been identified as having a deficiency in reading and a reading improvement plan will be established by the teacher, principal, other applicable school personnel and the parent(s) or guardian(s);

(ii) A description of the current services that are provided to the student; and

(iii) A description of the available reading intervention and supplemental instructional services and supports that could be provided to the student that are designed to address the identified areas of reading deficiency.

(b) Following development of the plan, the parent will be provided with:

(i) A description of the reading intervention and supplemental instructional services and support that will be provided to the student that are designed to address the identified areas of reading deficiency; and

(ii) Strategies for parents to use at home in helping their student to succeed in reading.

(c) At the conclusion of each school year, or earlier if it has been determined that the student is proficient and is no longer in need of intervention, the parent or guardian will be updated on the student's progress, including any recommendation for placement.

(4) District Annual Reporting. Each school district shall report to the state department of education by October 1 of each year the number and percentage of students, by grade level, on an individualized reading improvement plan.

(5) Department Responsibilities. The state department of education shall annually compile the information required along with state-level summary information and annually report such information to the state board of education, the public, the governor and the legislature. The department shall provide technical assistance as needed to aid school districts in implementing the provisions of this section.

(6) The state board of education may promulgate rules for the administration and implementation of this section.

33-1806. READING ASSESSMENT. The state department of education shall be responsible for administration of all assessment efforts and shall train LEA-level assessment personnel and report results.

(1)   In continuing recognition of the critical importance of reading skills, all public-school students in kindergarten and grades 1, 2 and 3 shall have their reading skills assessed. For purposes of this assessment, the state board approved research-based "Idaho Comprehensive Literacy Plan" shall be the reference document. The kindergarten assessment shall include reading readiness and phonological awareness. Grades 1, 2 and 3 shall test for fluency, comprehension and accuracy of the student's reading. The assessment shall be by a single statewide test specified by the state board of education, and the state department of education shall ensure that testing shall take place not less than two (2) times per year in the relevant grades. Additional assessments may be administered to students who are identified for reading interventions as set forth in section 33-1806, Idaho Code. The state K-3 assessment test results shall be reviewed by school personnel for the purpose of providing necessary interventions to sustain or improve the students' reading skills. Results shall show for each school building with kindergarten through grade 3 in each school district and charter school the percentage of students who are achieving proficiency on the statewide reading assessment and shall be maintained and compiled by the state department of education and shall be reported annually to the public through the state education dashboard and reported to the state board, legislature and governor in a consistent manner, by school and by district.

(2)   The assessment scores and interventions recommended and implemented shall be maintained in the permanent record of each student.

(3)   The administration of the state K-3 assessments is to be done in the local school districts by individuals chosen by the district other than the regular classroom teacher. All those who administer the assessments shall be trained by the state department of education.

(4)   It is legislative intent that curricular materials utilized by school districts for kindergarten through grade 3 shall be tied to evidence based best practices and aligned with the "Idaho Comprehensive Literacy Plan."

33-1807. LITERACY INTERVENTION. (1) Each school district and public charter school shall establish an extended time literacy intervention program for students who score basic or below basic on the fall reading screening assessments or alternate reading screening assessment in kindergarten through grade 3 and submit it to the state board of education.

(2)   The program shall provide:

(a)   Proven effective evidence-based substantial intervention and shall include phonemic awareness, decoding intervention, vocabulary, com- prehension and fluency as applicable to the student based on a formative assessment designed to, at a minimum, identify such weaknesses;

(b) May include adaptive learning technology literacy intervention tools as part of their literacy intervention program, must include parent input, be in alignment with the Idaho comprehensive

literacy plan, and be from the state board of education approved provider list established pursuant to subsection (3), online or digital instructional materials that are not part of a comprehensive program do not have to be from the approved provider list;

(c)   A minimum of sixty (60) hours of supplemental instruction for students in kindergarten through grade 3 who score below basic on the reading screening assessment; and

(d)   A minimum of thirty (30) hours of supplemental instruction for students in kindergarten through grade 3 who score basic on the reading screening assessment.

(3) The state board of education shall select adaptive learning technology literacy intervention providers through a request for proposals process to provide adaptive learning technology literacy intervention tools for school districts and charter schools to use as part of their literacy intervention programs for students in kindergarten through grade 3 that:

(a) Is an academic program focused on building age-appropriate literacy skills, which at a minimum include phonological awareness, phonics, fluency, comprehension, and vocabulary;

(b) Uses an evidence-based early intervention model;

(c) Includes a parental engagement and involvement component that allows parents to participate in their student's use of the tool at school or at home;

(d) Addresses early reading and literacy intervention through the use of interactive and adaptive computer software program.

(e) To remain on the approved provider list after the first year of identification, programs must be evaluated each year to determine effectiveness by an independent external evaluator. The evaluation will be based on a full academic year of implementation of tools implemented with fidelity and will include at a minimum growth toward proficiency measures.

(4)   The State Board of Education shall identify national evidence-based best practices and proven effective state intervention practices. The State Department of Education shall share State Board of Education identified intervention practices with school districts and charter schools throughout the state and maintain a resource center of best practices for literacy intervention in Kindergarten through grade 3. The resource center shall include, at a minimum, resources for parents and schools.

(5)   Of the funds appropriated for the purpose of this section, no more than one hundred dollars ($100) per student may be used for transportation costs.

(6)   For the purpose of program reimbursement, the state department of education shall adopt reporting forms, establish reporting dates, and adopt such additional guidelines and standards as necessary to accomplish the program goals that every child will read fluently and comprehend printed text on grade level by the end of the third grade.

(7)   To ensure students receive high quality literacy instruction and intervention, the state department of education shall provide professional development to districts and schools on best practices supporting literacy instruction, which includes data literacy, the

statewide reading assessment, and best practices as outlined in the state board of education approved "Idaho Comprehensive Literacy Plan." Intervention program participation and effectiveness by school and district shall be presented annually to the state board, the legislature and the governor.

(8) The state board of education or its delegate shall annually evaluate the cost and efficacy of literacy interventions used throughout Idaho.

(9) The state board of education shall promulgate rules implementing the provisions of this section. At a minimum, such rules shall include student trajectory growth to proficiency benchmarks and a timeline for reaching such benchmarks.

33-1808. EDUCATOR PREPARATION. (1) (1) Higher Education Institutions. The state board shall review teacher preparation programs at the institutions of higher education under its supervision and shall assure that the course offerings and graduation requirements are consistent with the state board-approved, research-based "Idaho Comprehensive Literacy Plan." To ensure compliance with this requirement, the board may allocate funds, subject to appropriation, to the higher education institutions that have teacher preparation programs.

The higher education institutions shall be responsible for the preservice assessment measures for all kindergarten through grade 12 teacher preparation programs. The assessment must include a demonstration of teaching skills and knowledge congruent with current research on best reading practices. The assessment may consist of multiple measures, in alignment with best practices, for the demonstration of these skills. Each institution shall report annually to the state board of education the number of preservice teachers who have passed the assessment. The state board of education shall then compile the statewide results and report to the legislature and the governor.

(3) For all Idaho teachers working on interim certificates, alternate routes or coming from out of state, completion of a state-approved reading instruction course shall be a one-time requirement for full certification.

(4) The board of trustees of every school district shall include, in its plan for in-service training, coursework covering reading skills development, including diagnostic tools to review and adjust instruction continuously, and the ability to identify students who need special help in reading. The district plan for in-service training in reading skills shall be submitted to the state department of education for review and approval, in a format specified by the department.

33-1809. ACCOUNTABILITY AND CONTINUOUS IMPROVEMENT. (1) In recognition of the critical role leadership plays in creating a culture in our schools around continuous improvement, it is the intent of the legislature to provide local school boards of trustees

and charter school boards of directors with the resources necessary to work effectively with school leadership to set goals and growth targets.

(2) All newly elected or appointed board members shall participate in at least one Board member orientation focused on:

a) state and school district or charter school resources available for literacy intervention and improvements;

b) school, district and state level data available to track progress on student literacy proficiency and growth toward proficiency; and

c) How to set measurable goals for improving student proficiency.

3) Every board of trustee member or charter school director shall participate in the literacy intervention orientation and training by June 30, 2023.

4) School district and charter schools shall set annual literacy proficiency and growth targets for students in kindergarten through grade 3.

5) Literacy proficiency and growth targets shall align with the continuous improvement plan goals and targets of the school district or charter school, and the framework for schools to achieve statewide literacy growth targets. Goal setting and growth targets shall be based on comparisons between similar cohorts of students in similar school buildings and school districts.

6) There shall be a statewide dashboard available for school personnel, parents, the governor, and the legislature to use to view progress toward the school's literacy proficiency and growth targets and statewide progress toward the statewide literacy growth targets set by the state board of education. Information will be available by school level based on like cohorts of students in similar schools and school districts.

33-1810   RULEMAKING AUTHORITY. The state board of education may promulgate rules for the implementation of this chapter.

SECTION 2. That Section 33-1207A, Idaho Code, be, and the same is hereby amended to read as follows:

33-1207A. TEACHER PREPARATION. (1) (1) Higher Education Institutions. The state board shall review teacher preparation programs at the institutions of higher education under its supervision and shall assure that the course offerings and graduation requirements are consistent with the state board-approved, research-based "Idaho Comprehensive Literacy Plan." To ensure compliance with this requirement, the board may allocate funds, subject to appropriation, to the higher education institutions that have teacher preparation programs.

The higher education institutions shall be responsible for the preservice assessment measures for all kindergarten through grade 12 teacher preparation programs. The assessment must include a demonstration of teaching skills and knowledge congruent with current research on best reading practices. The assessment may consist of

multiple measures, in alignment with best practices, for the demonstration of these skills. Each institution shall report annually to the state board of education the number of preservice teachers who have passed the assessment. The state board of education shall then compile the statewide results and report to the legislature and the governor.

(2) For all Idaho teachers working on interim certificates, alternate routes or coming from out of state, completion of a state-approved reading instruction course shall be a onetime requirement for full certification.

(3) The board of trustees of every school district shall include, in its plan for in-service training, coursework covering reading skills development, including diagnostic tools to review and adjust instruction continuously, and the ability to identify students who need special help in reading. The district plan for in-service training in reading skills shall be submitted to the state department of education for review and approval, in a format specified by the department.

(21) Nonpublic Teacher Preparation Programs.
(a) The state board shall grant teaching certificates to graduates of all already board-approved nonpublic teacher preparation programs that require their graduates to satisfy the following:
(i) Hold a bachelor's degree from an accredited four (4) year institution;
(ii) Submit to a criminal history check as described in section 33-130, Idaho Code;
(iii) Pass the required content training in the area or areas in which the graduate seeks to be endorsed. The content training must be in substantive alignment with knowledge or equivalent standards set forth in the initial standards for teacher certification, if any; and
(iv) Pass pedagogical training in substantive alignment with knowledge or equivalent standards set forth in the core standards of the initial standards for teacher certification, if any.
(b) Teaching certificates granted pursuant to this subsection shall be equivalent to certificates granted to graduates of teacher preparation programs at public higher education institutions. Interim certificates shall be made available to graduates of programs without a student teaching or clinical component and standard certificates subsequently shall be made available upon satisfaction of state board of education mentoring requirements and other state statutory requirements pertaining to all teachers. All performance requirements shall be considered satisfied by completion of state board mentoring requirements. Reviews of nonpublic teacher preparation programs shall be limited to verification of the criteria set forth in this subsection.

(32) For all Idaho teachers working on interim certificates, alternate routes or coming from out of state, completion of a state-approved reading instruction course shall be a onetime requirement for full certification.

(43) The board of trustees of every school district shall include, in its plan for in-service training, coursework covering reading skills development, including diagnostic tools to review and

adjust instruction continuously, and the ability to identify students who need special help in reading. The district plan for in-service training in reading skills shall be submitted to the state department of education for review and approval, in a format specified by the department.

(54) A board-approved nontraditional educator preparation program that has a contract with a local education agency or consortium thereof to recruit, select, train, and retain teachers to teach in public schools that struggle to recruit and retain teachers may obtain funding from the state department of education, subject to appropriation or other available funds, provided that the program shall match no less than one hundred percent (100%) of any cost to the state for implementation. The board-approved program must have a documented history of recruiting, training, and retaining high-quality teachers who achieve above-average academic growth from students in Idaho and other states. The nontraditional educator preparation program may apply to the state department of education for available funding at the time one (1) or more teachers recruited by the program enters into an employment contract with a local education agency (LEA). The amount of funding per teacher provided by the department to the program shall not exceed twenty-five percent (25%) of each teacher's annual salary for each year the program is providing services in support of the teacher. Such funding is limited to two (2) academic years per teacher. In order for the program to obtain funding from the department:
(a) The program and the LEA shall provide to the department verification of each teacher's fulfillment of the annual employment contract; and
(b) The program and the LEA shall provide verification that the LEA is providing funding to the program for recruiting and training each teacher in an amount equal to at least ten percent (10%) of the amount the department is providing to the program.

SECTION 3. That Section 33-1614, Idaho Code, be, and the same is hereby repealed.

SECTION 4. That Section 33-1615, Idaho Code, be, and the same is hereby repealed.

SECTION 5. That Section 33-1616, Idaho Code, be, and the same is hereby repealed.

TITLE 33
EDUCATION

CHAPTER 21
JUNIOR COLLEGES

33-2110. TUITION. (1) All students of a community college shall pay tuition that shall be fixed annually by the board of trustees not later than the 1st day of August of each year. The tuition for full-time students taking normal academic courses provided by the college, who are residents of the district, shall be fixed at not less than three hundred fifty dollars ($350) per annum, and may be increased by increments of not more than ~~ten~~ five percent (~~10~~5%) per annum ~~to a maximum tuition of two thousand five hundred dollars ($2,500) per annum~~. The tuition shall be, as nearly as is practicable, the annual costs of all elements of providing the courses of instruction, including interest on general obligation bonds, teaching, administration, maintenance, operation and depreciation of equipment and buildings, supplies and fuel, and other ordinary and necessary expenses of operation incurred in providing courses by the community college, provided that the tuition of students residing outside the district but within the county or counties wherein the district is located shall be fixed after taking into account moneys received by the community college district from any funds allocated to the community college from the educational funds of the state of Idaho, other than allocations for career technical education; and provided that the tuition of students residing outside the district and the county but within the state of Idaho shall be fixed after taking into account moneys received from educational funds other than career technical moneys, as referred to in this chapter, from the state of Idaho. Receipt of moneys, as hereinbefore provided in this section, shall be based upon the receipts from the sources referred to during the fiscal year preceding the fixing of the tuition. A student in a community college shall not be deemed a resident of the district or of the county or of the state of Idaho, unless that student is deemed a resident as defined by section 33-2110B, Idaho Code, for the district, county or state prior to the date of his first enrollment in the community college, and no student who was not a resident of the district, county or state shall gain residence while attending and enrolled in the community college. The residence of a minor shall be deemed to be the residence of his parents or parent or guardian. Tuition shall be payable in advance, but the board may, in its discretion, permit tuition to be paid in installments.

(2) The board of trustees shall also fix fees for laboratory and other special services provided by the community college and for special courses, including, but not limited to, night school, off-campus courses, summer school, career technical courses, as otherwise provided in this chapter, and other special instruction provided by the community college and nothing in this chapter shall be deemed to control the amount of tuition for special courses or fees for special services, as herein provided, but the same shall be, as nearly as reasonable, sufficient to cover the cost of all elements of providing courses as above defined.

(3) In this chapter, unless the context requires otherwise, the following definitions shall be uniformly applied. The application of these definitions shall be retroactive and prospective.

(a) "Fees" shall include all charges imposed by the governing body, to students, as a whole or individually, in excess of tuition. Student fees may be imposed for special courses, instruction, and service:

(i) "Special course or instruction fee" means those fees charged for any class or educational endeavor that has unique costs beyond a traditional college lecture class; for example, foreign language audio or visual instruction, specialized musical instruction, computer class, art class involving supplies or audiovisual equipment, career technical instruction, laboratory class, remedial instruction, team teaching, satellite transmissions, outside instructor, professionally assisted instruction, etc.

(ii) "Special service fee" means those fees charged for activity, benefit, or assistance offered to students which is beyond traditional classroom instruction; for example, student government support, providing of student health staff or facilities, student union support, intramural and intercollegiate athletics, recreational opportunities, financial aid services, graduation expense, automobile parking, student yearbook/publication, insurance, registration, noncapital library user fee, etc.

Fees shall not be imposed for any capital improvements except as specifically authorized in chapter 21, title 33, Idaho Code.

(b) "Tuition" means a sum charged students for cost of college instruction and shall include costs associated with maintenance and operation of physical plant, student services and institutional support.

DIVISION OF CAREER TECHNCIAL EDUCATION

SUBJECT
IDAPA 08.02.01.650 – High School Equivalency Certificate – Fee - Waiver

APPLICABLE STATUTE, RULE, OR POLICY
Idaho Administrative Code, IDAPA 08.02.01.650

BACKGROUND/DISCUSSION
The Idaho Division of Career Technical Education (Division) facilitates the distribution of High School Equivalency Certificates in collaboration with the State Department of Education. Currently, pursuant to IDAPA 08.02.01.650 students must pay a $10 processing fee to receive a High School Equivalency Certificate in addition to passing the General Education Development (GED) test. Students who complete their GED create an additional online account to order their certificate, as the Division currently uses a third party service, DiplomaSender to manage diploma orders. The Division is looking into using Parchment, a subsidiary of GED Testing Services, to streamline the process for students who pass the GED. Using Parchment, upon passing their GED, students could be automatically emailed a link to download digital copies of their GED certificate as well as their high school equivalency certificate and can order a free physical copy via email. GED Testing Services' subsidiary, Parchment would handle the processing at no additional charge, removing the need for a $10 processing fee.

IMPACT
The Division currently processes roughly 250 High School Equivalency Certificates per year; without the $10 processing fee, the Division will see an annual loss in revenue of $2,500. This will not have a significant effect on the Division's operations.

Removing the fee will create a streamlined, more equitable process for Idaho students receiving a High School Equivalency Credential.

STAFF COMMENTS AND RECOMMENDATIONS
Prior to 2014, students taking the GED test who wished to obtain an Idaho high school equivalency certificate had to pass a qualifying score on the GED test and show evidence that they met Idaho's American Government content standards requirements. This was done by providing evidence through passage of an American Government course in high school or college, completion of correspondence study from an accredited university or the Defense Activity for Non-Traditional Education Support (DANTES), or by successfully passing the American Government test furnished by the testing center. The ten-dollar ($10) processing fee was established to cover the costs of manually processing the Idaho high school equivalency certificate applications.

In 2014 the GED test was updated to align better to state standards nationally and college and career readiness competencies, including the inclusion of American Government into the test. Based on these improvements to the GED test the Board put forward an amendment to administrative rule eliminating the additional American Government requirement for students who took the test starting in 2014.

With the Division's move to a new processing platform, the processing fee is no longer necessary. Only those students who took the GED test prior to 2014 and are now seeking their Idaho high school equivalency certificate would need to be manually processed and the costs associated with that processing would be negligible.

The proposed waiver of the Idaho high school equivalency certificate processing fee will be incorporated into the temporary and proposed rule amendment to IDAPA 08.02.01 being considered under a separate agenda item. At the time of agenda production, staff did not have confirmation that the Governor would approve the temporary rule. If the temporary rule is not approved, the amendment will move forward as part of the proposed and then pending rule and would take affect at the end of the 2021 legislative session, should it not be rejected by the legislature. This waiver would allow the Division to dispense with the fee at this time, rather than waiting until the approval of the temporary rule or the enactment of the pending rule.

BOARD ACTION

I move to approve the request by the Division of Career Technical Education and to waive the high school equivalency certificate processing fee established in IDAPA 08.02.01.250 for FY 2021.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

SUBJECT

Temporary Rule – IDPA 08.02.01, Rules Governing Administration, Enrollment FTE

REFERENCE

August 2019	Board considered and rejected a proposed rule, Docket 08-0102-1901, setting reporting requirements for enrollment FTE and directed staff to bring back a temporary rule at the conclusion of planned visits in each of the regions to gather feedback.
October 2019	Board approved temporary rule establishing the enrollment FTE in a substantially similar format as presented at the Regular August Board meeting.

APPLICABLE STATUTE, RULE, OR POLICY

Sections 33-1001, 33-1002, 33-1003, 33-1003A, 33-1027, 33-1028, and 33-1619, Idaho Code
Idaho Administrative Code, IDAPA 08.02.01, Rules Governing Administration

BACKGROUND/DISCUSSION

Multiple draft bills were circulated during the 2019 legislative session rewriting the public school funding formula. Of these drafts three bills were printed. Two senate bills, SB1186 and SB1196 proposed rewriting the public schools funding formula to a "student centered" model based on student enrollment rather than an "allocation" model based on average daily attendance of students and personnel costs (salary based apportionment). A number of amendments were made throughout the process to try and reconcile the desired legislative policy change with education stakeholder concerns. Common ground between these two groups was not found during the 2019 session. Two of the major concerns raised by stakeholders were around the estimated numbers used for determining the fiscal impact of the proposed changes and how student enrollment would be counted for those students that attend more than one school. The proposed funding formula introduced a number of student characteristics that would be used to adjust the weight of the student enrollment in calculating state funding for a school district or charter school. These student characteristics were then identified through defined terms within the legislation to assure the uniform collection and application of the data necessary for calculating funding. In some cases the student characteristics were student information that is not currently collected at the state level or is currently collected but not in the same manner as proposed for use in the funding formula. For these defined terms, estimates were used to calculate the fiscal impact on an individual school district or charter school.

Additionally, the new funding formula proposed using student enrollment rather than average daily attendance. Similar to the current calculation of average daily attendance, the legislation stipulated a single student could not be counted as more than one (1) unweighted full-time equivalent (FTE) student with one

exception.   Students who met the definition of an at-risk student and were participating in a summer school or night school program could be counted for up to 1.25 unweighted FTE.   The proposed versions of the legislation then authorized the Board to promulgate rules to determine how fractional enrollment would be calculated for those students that attended more than one school district or charter school.

While no new funding formula was enacted, HB293 (2019) was passed.   HB293 established the majority of the definitions that were proposed in the earlier public school funding formula bills, with the addition of moving the definition of At-Risk Student from Idaho Administrative Code to Idaho Code and tasks the Board and the Department (as the Board's delegate) with collecting and reporting the necessary data for calculating full-time equivalent enrollment so that actual numbers can be used for determining the fiscal impact of future changes to how public schools are funded rather than using estimates for FTE enrollment based on head counts.   HB293 also added a new Section 33-1027, Idaho Code, directing the Board to promulgate rules necessary to determine how fractional enrollment will be calculated.   Furthermore, HB293 established additional reporting requirements (codified in Section 33-1028, Idaho Code) for school districts and charters schools regarding how funds appropriated for current statutory line items, pursuant to Section 33-1002, Idaho Code, are used.

Section 33-1027, Idaho Code, requires that the procedures for student enrollment counts be consistent with the following:
1) Full-time enrollment (FTE) shall be based on enrollment in any school district or public charter school;
2) A student shall not exceed a total of one (1.0) unweighted FTE in a single school year, except as provided in subsection (4) of this section;
3) A kindergarten student shall not exceed a total of one-half (0.5) unweighted enrollment in a single school year;
4) A student attending a summer school or night school program shall not exceed a total of one-fourth (0.25) unweighted enrollment. Such student may be counted pursuant to both this subsection and subsection (2) of this section; and
5) A fractional enrollment count schedule shall be specified for any student enrolled less than one (1.0) FTE in a given school district or public charter school;
6) FTE is based on the courses a student is enrolled in at the time of the official count, as specified in board rule, except that a student may be counted as enrolled if the term for which such student is enrolled begins after the time of the official count.

The portion of the temporary and proposed rule for reporting and calculating FTE enrollment looks at students who attend one school district or charter school (i.e. local education agency or LEA) and those students that attend more than one LEA. Section 33-1027, Idaho Code, requires the FTE be based on the courses in which

the student is enrolled.   Since school districts and charter schools are allowed to set their own schedules, there are schools with a semester schedule, trimester schedule, and a year-round schedule and varying length of time for class periods. Additionally, within these three type of annual schedules there are some LEAs that have four-day school weeks with longer class periods, some with block schedules where the student has a class two or three days a week with alternating classes on the days, and the more traditional shorter class periods with the course being taken each day of the week.   Due to these complexities, consensus could not be found in 2019 on a way to base the fractionalization on the number of courses alone.   The current calculation for average daily attendance is based on students attending 2.5 hours (half-day) or 4 hours (full-day) or more.   Using this concept the courses could be broken out to minutes per week, with 1,200 minutes per week being consistent with the current four-hour requirement for a full day of average daily attendance.

Due to the statutory requirement limiting each student to no more than one (1) FTE, each LEA that serves students taking more courses than a full course load through two or more LEAs must report less FTE for that student than what they would report for a student taking a full course load from one LEA.   While some students in grades 7 through 12 may be eligible for overload course funding through the Fast Forward program, this funding is not equivalent to the funding provided through the public schools appropriation for a full day of average daily attendance.   Additionally, this program is not available to students in grade 6 that may be enrolled in a middle school or a charter school student in a lower grade that may be attending full-time at the charter school and participating in band or another type of course at the traditional public school.

Board and State Department of Education (SDE) staff worked with representatives from the school districts to develop the provisions for reporting FTE enrollment. The group included school/district administrators, business officers, as well as the SDE's fiscal staff, to name a few.   In addition to seeking stakeholder feedback, Board staff and Board member Critchfield spoke with Utah and Washington education staff on how they count and fractionalize enrollment numbers.   Both indicated they use some form of course time or minutes courses are in session to calculate the FTE.

Due to the temporary nature of the rule approved by the Board in 2019, the enrollment reporting rule was scheduled to come back to the Board as a temporary and proposed rule for the 2020-2021 rulemaking cycle.   In March, as the impacts of the Coronavirus and soft closures started to hit schools, school district and charter school administrators requested the Board look at ways they could report average daily attendance given the various scenarios for continuing to instruct students that were happening around the state and students no longer being present in the buildings.

Section 33-1003A, Idaho Code, allows "…when a school is closed, or if a school remains open but attendance is significantly reduced because of storm, flood, failure of the heating plant, loss or damage to the school building, quarantine or order of any city, county or state health agency, or for reason believed by the board of trustees to be in the best interests of the health, safety or welfare of the pupils, the board of trustees having certified to the state department of education the cause and duration of such closure or impacted attendance, the average daily attendance for such day or days of closure or impacted attendance shall be considered as being the same as for the days when the school actually was in session or when attendance was not impacted." The condition created by the pandemic meet the threshold established in Section 33-1003A, Idaho Code, for considering average daily attendance to be the same for those days the buildings were physically closed or attendance was impacted for FY 2021, however, it is difficult to see how this provision could be applied across fiscal years and specifically for fall reporting.

Section 33-1003, Idaho Code, provides some protection for school district who see a three percent or more drop in average daily attendance, but does not apply to charter schools. Specifically, Section 33-1003, Idaho Code provides, "For any school district that has a decrease in total average daily attendance of three percent (3%) or more of its average daily attendance in the current school year from the total average daily attendance used for determining the allowance in the educational support program for the prior school year, the allowance of funds from the educational support program may be based on the average daily attendance of the prior school year, less three percent (3%)." Taken together, schools' average daily attendance could currently be reported based on the provisions allowed in Section 33-1003A, Idaho Code for FY20 and the protection afforded against a decrease in average daily attendance provided in Section 33-1003, Idaho Code, could then be applied in FY21.

Additionally, Section 33-1619, Idaho Code, allows traditional schools reporting average daily attendance for virtual and blended programs to report students based on either the "actual hours of attendance in the public virtual school on a flexible schedule, or the percentage of coursework completed." As schools move between online, blended, and in-person instruction for students in the 2020-2021 school year, these provisions could be applied.

Section 33-1002(3), Idaho Code, requires the Board to "establish rules setting forth the procedure to determine average daily attendance and the time for, and method of, submission of such reports." This procedure is established in IDAPA 08.02.01, and sets the reporting based on full day and half day attendance as noted above. IDAPA 08.02.02 also requires students to be physically present to be counted. This requirement does not apply to students in a virtual or blended instructional program.

Board staff have worked with SDE staff and a group of administrators and school district business officers to come to consensus on a methodology that would broaden the narrow definition of daily attendance to accommodate for students receiving instruction through different blended learning modalities as well as when buildings are required to close or have only limited access and student instruction in continuing remotely.   This would include virtual courses and hybrid courses as well as instances where a student is attending in-person and then the building needs to close and the student transitions for a short period of time to virtual learning.   The consensus of the group was the draft rule provided in Attachment 1. This draft rule would allow school districts and charter schools to use the enrollment reporting mechanism established for reporting FTE enrollment to identify the amount of time a student is receiving instruction as a proxy for the historical in-person attendance.

During the Legislative Education Working Group meeting, this proposal was presented in order to gather additional feedback. Some legislators during the working group meeting and individually after the meeting expressed some concerns over this methodology.   The feedback did not represent the group as a whole and the group did not take action on providing a formal recommendation back to the Board.   The main concern expressed, was the feeling that this could be a fundamental change that should be done through legislation rather than the rulemaking processes.   Additional concerns identified were around accountability for students receiving instruction if reporting was only based on average FTE enrollment and not student outcomes.   Due to the timing of this feedback, it was not possible to go back out and gather additional input on other ways for reporting average daily attendance.

In consideration of this feedback staff is providing the Board with two options for amending IDAPA 08.02.01. The first option, provided in Attachment 1, would establish the methodology for reporting FTE enrollment as approved by the Board at the October 2019 Board meeting with some additions identified as necessary clarification by the SDE during this past reporting cycle. These updates are highlighted in blue. The language is then further amended to allow for school districts and charter schools to use an average of the FTE enrollment for reporting average daily attendance.

The second option, provided in Attachment 2, would establish the methodology for reporting FTE enrollment as noted above and leaves the average daily attendance in place based on the full and half day reporting, but removes the restriction that the students must be physically present as long as the students are   under the instruction or supervision of the school district or charter school.

The temporary portion of the rule is necessary to put back into place the FTE enrollment methodology that is required by Section 33-1027, Idaho Code for the 2020-2021 school year and put in place a methodology for reporting average daily attendance at the start of the school year.   The proposed portion of the rule is

necessary to finalize the FTE enrollment reporting so the legislature can consider a pending rule during the 2021 Legislative Session and to keep any changes to the average daily attendance reporting in place through the remainder of the school year and beyond should the legislature choose not to take action during the 2021 Legislative Session.

IMPACT

The temporary and proposed rule will extend the FTE enrollment reporting methodology approved by the Board in 2019 and depending on the version approved:

o Attachment 1 – will additionally allow SDE to average the FTE enrollment reported to determine each school's average daily attendance numbers and subsequent staff allowance for funding purposes. This methodology, based on the FY 2020 reported FTE enrollment, is estimated to increase funding overall to Idaho public schools through the addition of 2,000 full-time equivalent students. This estimate does not take into consideration enrollment growth from FY 2020 to FY 2021.

o Attachment 2 – will additionally remove language restricting average daily attendance to those students physically present as long as they are under the instruction or supervision of school staff.

ATTACHMENTS

Attachment 1 – Temporary/Proposed rule amendments to IDAPA 08.02.01 – using average FTE Enrollment for reporting average daily attendance

Attachment 2 – Temporary/Proposed rule amendments to IDAPA 08.02.01 – clarifying full and half day average daily attendance reporting for virtual and hybrid programs

Attachment 3 – Temporary/Proposed rule amendments to IDAPA 08.02.01 – establishing FTE enrollment reporting only

STAFF COMMENTS AND RECOMMENDATIONS

Using the language and methodology for calculating student enrollment full-time equivalency provided to the Board at the August Board meeting as the basis, in 2019 Board staff attended five of the six regional superintendents meetings, with the President Critchfield attending the sixth meeting to discuss possible alternatives and gather feedback. This language was also sent out for feedback to charter school stakeholders. The feedback received indicated consensus in the language provided for the proposed rule and the request for additional clarifying language in the following areas:

- Definition of "course" to indicate courses are based on time and or content and course outcomes,
- Definition of "virtual course," a previously undefined term,
- Kindergarten students enrolled half-time in two separate LEAs,

- Enrollment reporting for regional career technical schools,
- Averaging minutes over two weeks for LEAs using block scheduling,
- Weighting virtual courses the same as face-to-face course when students participate in a face-to-face program and virtual program,
- Enrollment reporting for virtual programs when students are not shared with another LEA, and
- Summer school or night school FTE fractionalizing.

Administrative rules are made up of three types of rules. Temporary rules, proposed rules and pending rules. Temporary and proposed rules may be promulgated jointly with a single docket number or temporary rules may be promulgated as a standalone rule. A rule must go through the proposed rule and pending rule steps to become a final rule. Temporary rules go into effect at the time of Board approval unless an alternative effective date is specified by Board action. To qualify as a temporary rule, the rule must meet one of three criteria:

- provides protection of the public health, safety, or welfare; or
- is to come into compliance with deadlines in amendments to governing law or federal programs; or
- is conferring a benefit.

Temporary rules that are approved prior to the start of a legislative session expire at the end of that legislative session unless action is taken by the legislature to extend the rule. The legislature does not see temporary rules unless there is a specific request to extend the temporary rule past the close of the legislative session. Proposed rules approved by the Board are published in the Idaho Administrative Rules Bulletin. Following publication there is a 21-day comment period. Based on received comments and Board direction, changes may be made to proposed rules prior to entering the pending stage. Pending rules are then brought back to the Board for consideration. Once approved, pending rules will be submitted to the Department of Administration for publication in the Idaho Administrative Rules Bulletin and are then forwarded to the legislature for consideration. Pending rules become effective at the end of the legislative session in which they are submitted, if they are not rejected by the Legislature.

BOARD ACTION

I move to approve the temporary and proposed rule amendments establishing enrollment full time equivalencies reporting, as submitted in Attachment _____.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

IDAPA 08
TITLE 02
CHAPTER 01

08.02.01 – RULES GOVERNING ADMINISTRATION

(BREAK IN CONTINUITY OF SECTIONS)

007   DEFINITIONS *(originally approved by the Board October 2019)*

    01.   Course. A unit of instruction that may be determined based on the amount of instructional time or predetermined level of content and course outcomes.

    02.   Virtual Course. A course where instruction is provided in an on-line or virtual format and does not necessarily include face-to-face instruction.

(BREAK IN CONTINUITY OF SECTIONS)

250.   PUPIL ACCOUNTING AND REQUIRED INSTRUCTIONAL TIME.
(Section 33-512, Idaho Code)   (4-1-97)

    01.   Required Instructional Time. Excluding transportation to and from school, lunch periods, passing times, and recess, schools must schedule at least the following instructional times: kindergarten, four hundred fifty (450) hours per year or equivalent amount of instruction through an online, distance, or blended learning format; grades one through three (1-3), eight hundred ten (810) hours per year or equivalent amount of instruction through an online, distance, or blended learning format; grades four through eight (4-8), nine hundred (900) hours per year or equivalent amount of instruction through an online, distance, or blended learning format; and grades nine through twelve (9-12), nine hundred ninety (990) hours per year or equivalent amount of instruction through an online, distance, or blended learning format. The equivalent amount of instruction shall be based on the amount of time reported for the same course or amount of coursework delivered in an in-person setting.   (4-1-97)

    02.   Required Attendance. All pupils will complete four (4) years of satisfactory attendance in grades nine through twelve (9-12) to graduate from an accredited high school, except those who are approved for early graduation.   (4-1-97)

    03.   Day in Session When Counting Pupils in Attendance.   (4-1-97)

    a.   A school day for grades one through twelve (1-12) may be counted as a "day in session" when the school is ~~open~~ in session and students are under the guidance and direction of teachers in the teaching process for not less than four (4) hours or its equivalent of instruction per day. Lunch periods, breaks, passing time and recess will not be included in the four (4) hours. For kindergarten, each session will be at least two and one-half (2 1/2) hours per day.   (4-1-97)

    b.   Half-day Session. A half-day in session occurs when the students in grades one through twelve (1-12) are under the guidance and direction of teachers in the teaching process for a minimum of two and one-half (2 1/2) hours of instruction or the teachers are involved in staff development activities for not less than two and one-half (2 1/2) hours.   (4-1-97)

    c.   Teacher In-service Activities. For grades one through twelve (1-12), not more than twenty-two (22) hours may be utilized for teacher in-service activities, based on the district approved calendar. In the event a school district chooses to utilize full days instead of half-days, the attendance reported for these full days will be the average of the attendance for the other days of that same week.   (4-1-97)

    04.   Day of Attendance - Kindergarten. A day of attendance for a kindergarten pupil is one in which

a pupil is ~~physically present for a period of two and one-half (2 1/2) hours~~ under the direction and guidance of a teacher for a period of two and one-half (2 1/2) hours while school is in session or under homebound instruction. A homebound student is one who is unable to attend school for at least ten (10) consecutive days due to illness, accident or an unusual disabling condition. Attendance will be reported in half-day increments. ~~Attendance reports for any day in the school year will reflect only those students physically present.~~ Particularly, enrollment figures are not to be used for the beginning nor closing weeks of school. (Section 33-1001(5), Idaho Code.)   (4-1-97)

05. **Day of Attendance (ADA) - Grades One Through Twelve (1-12)**. A day of attendance is one in which a pupil is ~~physically present for the full day~~ under the guidance and direction of a teacher or other authorized school district personnel while school is in session or is a homebound student under the instruction of a teacher employed by the district in which the pupil resides, with the exception as stated in "day in session" above. A homebound student is one who is unable to attend school for at least ten (10) consecutive days due to illness, accident or an unusual disabling condition. Attendance will be reported in full or half-days. ~~Attendance reports for any day in the school year will reflect only those students physically present or under homebound instruction.~~ (Section 33-1001(4), Idaho Code)   (4-1-97)

06. **Average Daily Attendance**. Average daily attendance will be computed by averaging the full-time equivalent enrollment by week for students receiving instruction. To be considered as a student receiving instruction the student must have regular contact with the applicable instructional or pupil service staff member and be completing assignments as applicable to the grade range and course the student is enrolled in. In a given school year, the annual average daily attendance for a given school is the aggregate scheduled days of attendance divided by the number of days school was actually in session. (Section 33-1001(2), Idaho Code)   (4-1-97)

07. **Full-Time Equivalent (FTE) Enrollment Reporting**. *(originally approved by the Board October 2019, with additional edits highlighted in blue)*

a.   Kindergarten students enrolled in one LEA for a total number of courses that equal 600 or more minutes per week shall equal 0.5 FTE. Grade 1 through grade 12 students enrolled in one LEA for a total number of courses that equal 1,200 or more minutes per week shall equal one (1) FTE.

b.   Kindergarten students enrolled in one or more LEAs for a total number of courses at all LEAs that equal 600 minutes per week or less, the FTE shall be based on the percentage of time each student's courses are of 600 minutes. Grade 1 through grade 12 students enrolled in one or more LEAs for a total number of courses at all LEAs that equal 1,200 minutes per week or less, the FTE shall be based on the percentage of time each student's courses are of 1,200 minutes.

c.   Kindergarten students enrolled in more than one LEA for a total number of courses at all LEAs that equal 600 or more minutes per week and less than or equal to 750 minutes the FTE shall be fractionalized based on percentage of time for which the student is enrolled. Grade 1 through grade 12 students enrolled in more than one LEA for a total number of courses at all LEAs that equal 1,200 or more minutes per week and less than or equal to the respective amounts in the following subsections the FTE shall be fractionalized based on percentage of time for which the student is enrolled:

i.   Kindergarten: 750 minutes.
ii.   Grade 1 through grade 3: 1,350 minutes.
ii.   Grade 4 through grade 8: 1,500 minutes.
iii.   Grade 9 through grade 12: 1,650 minutes.

d.   Students enrolled in more than one LEA for a total number of courses at all LEAs that equal more than the following minutes the FTE shall be based on the percentage of time for which the student is enrolled:

i.   Grade 1 through grade 3: 1,350 minutes.
ii.   Grade 4 through grade 8: 1,500 minutes.
iii.   Grade 9 through grade 12: 1,650 minutes.

e.   Courses in LEAs with block scheduling that results in students attending courses for a period greater than one week in order to encompass all courses the student is enrolled in for the term will use average minutes per week over the applicable time period to determine the courses minutes per week.

f.   ~~Students enrolled in regional career technical schools, as defined in Section 33-21002G, Idaho Code, will be included in the enrollment FTE of the sending LEA. Course information for these programs must include the school providing the instruction in a way that allows students to be identified as attending the applicable courses through the regional career technical school.~~

      g.   Students enrolled in an alternative summer school or alternative night school program of two hundred twenty-five (225) or more hours of instruction may be counted as an additional point two five (.25) FTE.

      h.   Students enrolled in an alternative summer school or night school program of less than two hundred twenty-five (225) hours FTE will be determined based on the proportional share of two hundred twenty-five (225) hours the program consists of.

      i.   Students enrolled in more than one LEA in grade 7 through grade 12 shall count enrollment at all LEAs for determining eligibility of overload courses identified in Section 33-4601 and 33-4602, Idaho Code.

(BREAK IN CONTINUITY OF SECTIONS)

IDAPA 08
TITLE 02
CHAPTER 01

08.02.01 – RULES GOVERNING ADMINISTRATION

(BREAK IN CONTINUITY OF SECTIONS)

007   DEFINITIONS *(originally approved by the Board October 2019)*

          01.   Course. A unit of instruction that may be determined based on the amount of instructional time or predetermined level of content and course outcomes.

          02.   Virtual Course. A course where instruction is provided in an on-line or virtual format and does not necessarily include face-to-face instruction.

(BREAK IN CONTINUITY OF SECTIONS)

250.   PUPIL ACCOUNTING AND REQUIRED INSTRUCTIONAL TIME.
(Section 33-512, Idaho Code)   (4-1-97)

          01.   Required Instructional Time. Excluding transportation to and from school, lunch periods, passing times, and recess, schools must schedule at least the following instructional times: kindergarten, four hundred fifty (450) hours per year or equivalent amount of instruction through an online, distance, or blended learning format; grades one through three (1-3), eight hundred ten (810) hours per year or equivalent amount of instruction through an online, distance, or blended learning format; grades four through eight (4-8), nine hundred (900) hours per year or equivalent amount of instruction through an online, distance, or blended learning format; and grades nine through twelve (9-12), nine hundred ninety (990) hours per year or equivalent amount of instruction through an online, distance, or blended learning format. The equivalent amount of instruction shall be based on the amount of time reported for the same course or amount of coursework delivered in an in-person setting.   (4-1-97)

          02.   Required Attendance. All pupils will complete four (4) years of satisfactory attendance in grades nine through twelve (9-12) to graduate from an accredited high school, except those who are approved for early graduation.   (4-1-97)

          03.   Day in Session When Counting Pupils in Attendance.   (4-1-97)

          a.   A school day for grades one through twelve (1-12) may be counted as a "day in session" when the school is ~~open~~ in session and students are under the guidance and direction of teachers in the teaching process for not less than four (4) hours or its equivalent of instruction per day. Lunch periods, breaks, passing time and recess will not be included in the four (4) hours. For kindergarten, each session will be at least two and one-half (2 1/2) hours per day.   (4-1-97)

          b.   Half-day Session. A half-day in session occurs when the students in grades one through twelve (1-12) are under the guidance and direction of teachers in the teaching process for a minimum of two and one-half (2 1/2) hours of instruction or the teachers are involved in staff development activities for not less than two and one-half (2 1/2) hours.   (4-1-97)

          c.   Teacher In-service Activities. For grades one through twelve (1-12), not more than twenty-two (22) hours may be utilized for teacher in-service activities, based on the district approved calendar. In the event a school district chooses to utilize full days instead of half-days, the attendance reported for these full days will be the average of the attendance for the other days of that same week.   (4-1-97)

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a pupil is ~~physically present for a period of two and one-half (2 1/2) hours~~ under the direction and guidance of a teacher for a period of two and one-half (2 1/2) hours while school is in session or under homebound instruction. A homebound student is one who is unable to attend school for at least ten (10) consecutive days due to illness, accident or an unusual disabling condition. Attendance will be reported in half-day increments. ~~Attendance reports for any day in the school year will reflect only those students physically present.~~ Particularly, enrollment figures are not to be used for the beginning nor closing weeks of school. (Section 33-1001(5), Idaho Code.)   (4-1-97)

> **05.   Day of Attendance (ADA) - Grades One Through Twelve (1-12)**. A day of attendance is one in which a pupil is ~~physically present for the full day~~ under the guidance and direction of a teacher or other authorized school district personnel while school is in session or is a homebound student under the instruction of a teacher employed by the district in which the pupil resides, with the exception as stated in "day in session" above. A homebound student is one who is unable to attend school for at least ten (10) consecutive days due to illness, accident or an unusual disabling condition. Attendance will be reported in full or half-days. ~~Attendance reports for any day in the school year will reflect only those students physically present or under homebound instruction.~~ Students receiving instruction through a distance education format that does not meet the definition of a virtual school pursuant to section 33-5202A, Idaho code, or receiving instruction through a blend of virtual and traditional instruction may be counted as in attendance in the same manner as blended programs pursuant to Section 33-1619, Idaho code. (Section 33-1001(4), Idaho Code)   (4-1-97)

> **06.   Average Daily Attendance**. In a given school year, the annual average daily attendance for a given school is the aggregate scheduled days of attendance divided by the number of days school was actually in session. (Section 33-1001(2), Idaho Code)   (4-1-97)

> **07.   Full-Time Equivalent (FTE) Enrollment Reporting**. *(originally approved by the Board October 2019, with additional edits highlighted in blue)*
>> a.   Kindergarten students enrolled in one LEA for a total number of courses that equal 600 or more minutes per week shall equal 0.5 FTE. Grade 1 through grade 12 students enrolled in one LEA for a total number of courses that equal 1,200 or more minutes per week shall equal one (1) FTE.
>> **b.**   Kindergarten students enrolled in one or more LEAs for a total number of courses at all LEAs that equal 600 minutes per week or less, the FTE shall be based on the percentage of time each student's courses are of 600 minutes. Grade 1 through grade 12 students enrolled in one or more LEAs for a total number of courses at all LEAs that equal 1,200 minutes per week or less, the FTE shall be based on the percentage of time each student's courses are of 1,200 minutes.
>> **c.**   Kindergarten students enrolled in more than one LEA for a total number of courses at all LEAs that equal 600 or more minutes per week and less than or equal to 750 minutes the FTE shall be fractionalized based on percentage of time for which the student is enrolled. Grade 1 through grade 12 students enrolled in more than one LEA for a total number of courses at all LEAs that equal 1,200 or more minutes per week and less than or equal to the respective amounts in the following subsections the FTE shall be fractionalized based on percentage of time for which the student is enrolled:
>>> i.   Kindergarten: 750 minutes.
>>> ii.   Grade 1 through grade 3: 1,350 minutes.
>>> ii.   Grade 4 through grade 8: 1,500 minutes.
>>> iii.   Grade 9 through grade 12: 1,650 minutes.
>> **d.**   Students enrolled in more than one LEA for a total number of courses at all LEAs that equal more than the following minutes the FTE shall be based on the percentage of time for which the student is enrolled:
>>> i.   Grade 1 through grade 3: 1,350 minutes.
>>> ii.   Grade 4 through grade 8: 1,500 minutes.
>>> iii.   Grade 9 through grade 12: 1,650 minutes.
>> **e.**   Courses in LEAs with block scheduling that results in students attending courses for a period greater than one week in order to encompass all courses the student is enrolled in for the term will use average minutes per week over the applicable time period to determine the courses minutes per week.
>> ~~**f.**   Students enrolled in regional career technical schools, as defined in Section 33-21002G, Idaho Code, will be included in the enrollment FTE of the sending LEA. Course information for these programs must include the school providing the instruction in a way that allows students to be identified as attending the applicable courses through the regional career technical school.~~

g.   Students enrolled in an alternative summer school or alternative night school program of two hundred twenty-five (225) or more hours of instruction may be counted as an additional point two five (.25) FTE.

h.   Students enrolled in an alternative summer school or night school program of less than two hundred twenty-five (225) hours FTE will be determined based on the proportional share of two hundred twenty-five (225) hours the program consists of.

i.   Students enrolled in more than one LEA in grade 7 through grade 12 shall count enrollment at all LEAs for determining eligibility of overload courses identified in Section 33-4601 and 33-4602, Idaho Code.

(BREAK IN CONTINUITY OF SECTIONS)

DIVISION OF CAREER TECHNICAL EDUCATION

SUBJECT
Pending Rule Docket No. 08-0202-1805, Rules Governing Uniformity, Educator Credential – Occupational Specialist Endorsements

REFERENCE

August 2016	Board approved proposed rule restructuring instructional certificates into a single certificate and making technical updates to the Occupational Specialist Certificates.
November 28, 2016	Board approved pending rule restructuring instructional certificates into a single certificate and making technical updates to the Occupational Specialist Certificates.
August 31, 2017	Board approved proposed rule updating occupation specialist certification requirements, including additional training options for administrators and teachers.
November 2017	Board approved pending rule amendments
August 2018	Board approved proposed rule Docket 08-0202-1804 providing clarification regarding the professional endorsement and Docket 08-0202-1805 incorporating career technical educator endorsements into administrative rule.
November 2018	Board approved pending rule Docket 08-0202-1804, Professional Endorsement and Docket 08-0202-1805 CTE Educator Certification.

APPLICABLE STATUTE, RULE, OR POLICY
Section 33-1201 through 33-1204, Idaho Code
Section 33-2211 and 33-2205, Idaho Code
Idaho Administrative Code, IDAPA 08.02.02, Rules Governing Uniformity

BACKGROUND/DISCUSSION
Administrative code sets out the requirements for all certificated staff serving in Idaho public schools.   In addition to the Standard Instructional Certificates, IDAPA 08.02.02.015, Educator Credential, outlines the provisions for career technical education educator certification requirements. Three levels of Occupational Specialist Certificates exist: Limited Occupational Specialist, Standard Occupational Specialist, and Advanced Occupational Specialist.   Individuals entering the field of career technical teaching for the first time receive a Limited Occupational Specialist Certificate. This is a one time, three year certificate.   At the conclusion of the term of this certificate, individuals may apply for either a Standard Occupational Specialist Certificate or an Advanced Occupational Specialist Certificate.   The standard and advanced certificates are renewable five year certificates.   SB 1329

(2020) amended Section 33-2205, Idaho Code, setting out specific levels of experience necessary for individuals to receive an Occupational Specialist Certificate. Pursuant to Section 33-2205, Idaho Code, the Board shall authorize the issuance of a career technical education certificate to individuals who:

    (a) Submit to a criminal history check as described in section 33-130, Idaho Code, and meet at least one (1) of the following criteria:

        (i) Hold or have held an approved industry certification in a field closely related to the content area in which the individual seeks to teach as defined by the division of career technical education;

        (ii) Demonstrate a minimum of six thousand (6,000) hours of professional experience in a field closely related to the content area in which the individual seeks to teach; or

        (iii) Hold a baccalaureate degree in a field closely related to the content area in which the individual seeks to teach and demonstrate two thousand (2,000) hours of professional experience in a field closely related to the content area in which the individual seeks to teach; and

    (b) Complete an educator training program or courses approved by the division of career technical education.

The proposed amendment to IDAPA 08.02.02.015 aligns the requirements for the Occupational Specialist Certificate to the limits section in Section 33-2205, Idaho Code and removes two endorsements that are now maintained in Board Policy IV.E. along with the other Career Technical Educator Endorsements and additional technical corrections.

Section 33-1201A, Idaho Code, allows for instructional staff and pupil service staff to provide additional evidence demonstrating effective teaching that may be considered in exceptional cases for purposes of determining proficiency and student achievement in the event required standards for professional endorsement are not met. This provision allows for staff coming from out-of-state who have held a certificate for three (3) or more years to provide evidence that they have met the professional compensation rung performance criteria for two (2) or three (3) previous years or the third (most recent) year.   This evidence could be in the form of evaluations from the state they are coming from that are aligned with the Idaho evaluation standards or evidence that the majority of their students during the applicable time period met their student achievement performance targets. HB523 (2020) amended this section of code, adding the Advanced Professional endorsement with the same provision allowing additional evidence to be provided to demonstrate the individual meets the requirements for the endorsement. The proposed amendments update IDAPA 08.02.02.028 to include the Advanced Professional Endorsement and reference the sections of code where the specific performance criteria are established.

IMPACT

Approval of the proposed rule will bring it into alignment with the statutory changes and allow for it to be published in the Administrative Bulleting and go out for public comment.

ATTACHMENTS

Attachment 1 – Proposed Rule Amendments

STAFF COMMENTS AND RECOMMENDATIONS

Administrative rules are made up of three types of rules, temporary rules, proposed rules and pending rules.   Proposed rules approved by the Board are published in the Idaho Administrative Rules Bulletin. Following publication there is a 21-day comment period. Based on received comments and Board direction, changes may be made to proposed rules prior to entering the pending stage. Pending rules are then brought back to the Board for final consideration.   Once approved, pending rules are submitted to the Department of Administration for publication in the Idaho Administrative Rules Bulletin and are then forwarded to the legislature for consideration. Pending rules become effective at the end of the legislative session in which they are submitted, if they are not rejected by the Legislature.

Staff recommends approval.

BOARD ACTION

I move to approve pending rule amendments to IDAPA 08.02.02, as submitted in Attachment 1.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

08.02.02 – RULES GOVERNING UNIFORMITY

015. IDAHO EDUCATOR CREDENTIAL.
The State Board of Education authorizes the State Department of Education to issue certificates and endorsements to those individuals meeting the specific requirements for each area provided herein. (3-25-16)

01. Standard Instructional Certificate. A Standard Instructional Certificate makes an individual eligible to teach all grades, subject to the grade ranges and subject areas of the valid endorsement(s) attached to the certificate. A standard instructional certificate may be issued to any person who has a baccalaureate degree from an accredited college or university and who meets the following requirements: (3-29-17)

a. **Professional education requirements:** (3-29-17)

i. Earned a minimum of twenty (20) semester credit hours, or thirty (30) quarter credit hours, in the philosophical, psychological, methodological foundations, instructional technology, and in the professional subject matter, which shall include at least three (3) semester credit hours, or four (4) quarter credit hours, in reading and its application to the content area; (3-29-17)

ii. The required minimum credit hours must include at least six (6) semester credit hours, or nine (9) quarter credit hours, of student teaching in the grade range and subject areas as applicable to the endorsement; and (3-29-17)

b. Completed an approved educator preparation program and have an institutional recommendation from an accredited college or university specifying the grade ranges and subjects for which they are eligible to receive an endorsement in; (4-11-19)

c. Individuals seeking endorsement must complete preparation in at least two (2) fields of teaching. One (1) of the teaching fields must consist of at least thirty (30) semester credit hours, or forty-five (45) quarter credit hours and a second field of teaching consisting of at least twenty (20) semester credit hours, or thirty (30) quarter credit hours. Preparation of not less than forty-five (45) semester credit hours, or sixty-seven (67) quarter credit hours, in a single subject area may be used in lieu of the two (2) teaching field requirements; (3-20-20)

d. Proficiency in areas noted above is measured by completion of the credit hour requirements provided herein. Additionally, each candidate must meet or exceed the state qualifying score on the state board approved content area and pedagogy assessments. (3-29-17)

e. The Standard Instructional Certificate is valid for five (5) years. Six (6) semester credit hours are required every five (5) years in order to renew the certificate. (3-29-17)

02. Pupil Service Staff Certificate. Persons who serve as school counselors, school psychologists, speech-language pathologists, school social workers, school nurses and school audiologists are required to hold the Pupil Service Staff Certificate, with the respective endorsement(s) for which they qualify. Persons who serve as an occupational therapist or physical therapist may be required, as determined by the local educational agency, to hold the Pupil Service Staff Certificate with respective endorsements for which they qualify. (3-28-18)

a. School Counselor (K-12) Endorsement. To be eligible for a Pupil Service Staff Certificate - School Counselor (K-12) endorsement, a candidate must have satisfied the following requirements. The Pupil Service Staff Certificate with a School Counselor (K-12) endorsement is valid for five (5) years. Six (6) semester credit hours are required every five (5) years in order to renew the endorsement. (3-28-18)

i. Hold a master's degree and provide verification of completion of an approved program of graduate study in school counseling, including sixty (60) semester credits, from a college or university approved by the Idaho State Board of Education or the state educational agency of the state in which the program was completed. The program must include successful completion of seven hundred (700) clock hours of supervised field experience, seventy-five percent (75%) of which must be in a K-12 school setting. This K-12 experience must be in each of the following levels: elementary, middle/junior high, and high school. Previous school counseling experience may be considered to help offset the field experience clock

hour requirement; and (3-20-20)

  ii. An institutional recommendation is required for a School Counselor (K-12) endorsement. (3-28-18)

  b. School Counselor – Basic (K-12) Endorsement. (3-28-18)

  i. Individuals serving as a school counselor pursuant to Section 33-1212, Idaho Code, shall be granted a Pupil Service Staff Certificate with a School Counselor – Basic (K-12) endorsement. The endorsement is valid for five (5) years or until such time as the holder no longer meets the eligibility requirements pursuant to Section 33-1212, Idaho Code. Six (6) semester credit hours are required every five (5) years in order to renew the endorsement. (4-11-19)

  ii. Individuals who received their endorsement pursuant to Section 33-1212, Idaho Code, prior to July 1, 2018, will be transitioned into the School Counselor – Basic (K-12) endorsement. Renewal date will remain the same as the initial credential. (3-28-18)

  c. School Psychologist Endorsement. This endorsement is valid for five (5) years. In order to renew the endorsement, six (6) professional development credits are required every five (5) years. The renewal credit requirement may be waived if the applicant holds a current valid National Certification for School Psychologists (NCSP) offered through the National Association of School Psychologists (NASP). To be eligible for initial endorsement, a candidate must complete a minimum of sixty (60) graduate semester credit hours which must be accomplished through one (1) of the following options: (3-25-16)

  i. Completion of an approved thirty (30) semester credit hour, or forty-five (45) quarter credit hours, master's degree in education or psychology and completion of an approved thirty (30) semester credit hour, or forty- five (45) quarter credit hour, School Psychology Specialist Degree program, and completion of a minimum of twelve hundred (1,200) clock-hour internship within a local education agency under the supervision of the training institution and direct supervision of a certificated school psychologist; (3-20-20)

  ii. Completion of an approved sixty (60) semester credit hour, or ninety (90) quarter credit hour, master's degree program in School Psychology, and completion of a minimum of twelve hundred (1,200) clock-hour internship within a local education agency under the supervision of the training institution and direct supervision of a certificated school psychologist; (3-20-20)

  iii. Completion of an approved sixty (60) semester credit hour, or ninety (90) quarter credit hour, School Psychology Specialist degree program which did not require a master's degree as a prerequisite, with laboratory experience in a classroom, which may include professional teaching experience, student teaching or special education practicum, and completion of a minimum twelve hundred (1,200) clock-hour internship within a local education agency under the supervision of the training institution and direct supervision of a certificated school psychologist; and (3-20-20)

  iv. Earn a current and valid National Certification for School Psychologists (NCSP) issued by the National Association of School Psychologists (NASP). (3-25-16)

  d. Interim Endorsement – School Psychologist. This endorsement will be granted for those who do not meet the educational requirements but hold a master's degree in school psychology and are pursuing an educational specialist degree. This non-renewable endorsement will be issued for three (3) years while the applicant is meeting the educational requirements. (3-20-20)

  e. School Nurse Endorsement. This endorsement is valid for five (5) years. Six (6) credits are required every five (5) years in order to renew the endorsement. Initial endorsement may be accomplished through completion of either requirements in Subsections 015.02.c.i. or 015.02.c.ii. (4-11-19)

  i. The candidate must possess a valid professional nursing (RN) license issued by the Idaho State Board of Nursing, and a baccalaureate degree in nursing, education, or a health-related field from an accredited institution. (4-11-19)

  ii. The candidate must possess a valid professional nursing (RN) license issued by the Idaho State Board of Nursing; have two (2) years of full-time (or part-time equivalent) school nursing, community health nursing, or any other area of pediatric, adolescent, or family nursing experience; and have completed six (6) semester credit hours from a university or college in any of the following areas: (4-11-19)

(1)   Health program management.   (3-25-16)

(2)   Nursing leadership.   (4-11-19)

(3)   Pediatric nursing or child development.   (4-11-19)

(4)   Population of community health.   (4-11-19)

(5)   Health care policy, ethics, or cultural competency.   (4-11-19)

(6)   Research and/or statistics.   (4-11-19)

f.   Interim Endorsement - School Nurse. This endorsement will be granted for those who do not meet the educational and/or experience requirements but who hold a valid professional nursing (RN) license in Idaho. An Interim School Nurse Endorsement will be issued for three (3) years while the applicant is meeting the educational or experience requirements, or both, and it is not renewable.   (4-11-19)

g.   Speech-Language Pathologist Endorsement. This endorsement is valid for five (5) years. Six (6) credits are required every five (5) years in order to renew the endorsement. The initial endorsement will be issued to candidates who possess a master's degree from an accredited college or university in a speech/language pathology program approved by the State Board of Education, and who receive an institutional recommendation from an accredited college or university.   (3-25-16)

h.   Interim Endorsement - Speech-Language Pathologist. This endorsement will be granted for those who do not meet the educational requirements but hold a baccalaureate degree in speech-language pathology and are pursuing a master's degree. This endorsement will be issued for three (3) years while the applicant is meeting the educational requirements, and is not renewable.   (3-20-20)

i.   Audiology Endorsement. This endorsement is valid for five (5) years. Six (6) credits are required every five (5) years in order to renew the endorsement. The initial endorsement will be issued to candidates who possess a master's degree from an accredited college or university in an audiology program approved by the State Board of Education, and who receive an institutional recommendation from an accredited college or university.   (3-25-16)

j.   School Social Worker Endorsement. This endorsement is valid for five (5) years. Six (6) credit hours are required every five (5) years in order to renew the endorsement. Initial endorsement shall be accomplished by meeting the following requirements: (3-20-20)

i.   A master's degree in social work (MSW) from a postsecondary institution accredited by an organization recognized by the State Board of Education. The program must be currently approved by the state educational agency of the state in which the program was completed; and   (3-29-17)

ii.   An institution recommendation from an Idaho State Board of Education approved program; and   (3-29-17)

iii.   The successful completion of a school social work practicum in a preschool through grade twelve 12 (Pre-K-12) setting. Post-LMSW extensive experience working with children and families may be substituted for the completion of a school social work practicum in a Pre-K-12 setting; and   (3-20-20)

iv.   A current and valid social work license pursuant to chapter 32, title 54, Idaho Code, and the rules of the State Board of Social Work Examiners.   (3-20-20)

k.   Occupational Therapist Endorsement. A candidate with a current and valid Occupational Therapy license issued by the Occupational Therapy Licensure Board of Idaho will be granted an Occupational Therapist endorsement. The Pupil Service Staff Certificate with an Occupational Therapist endorsement is valid for five (5) years. Six (6) semester credit hours are required every five (5) years in order to renew the endorsement. Candidate must maintain current and valid Occupational Therapy Licensure for the endorsement to remain valid.   (4-11-19)

l.   Physical Therapist Endorsement. A candidate with a current and valid Physical Therapy license issued by the Idaho Physical Therapy Licensure Board will be granted a Physical Therapist endorsement. The Pupil Service Staff Certificate with a Physical Therapist endorsement is valid for five (5) years. Six (6) semester credit hours are required every five (5) years in order to renew the endorsement. Candidate must maintain current and valid Physical Therapy Licensure for the endorsement to remain valid.   (3-28-18)

03.   **Administrator Certificate.** Every person who serves as superintendent, director of special

education, secondary school principal, or principal of an elementary school with eight (8) or more teachers (including the principal), or is assigned to conduct the summative evaluation of certified staff is required to hold an Administrator Certificate. The certificate may be endorsed for service as school principal, superintendent, or director of special education. Assistant superintendents are required to hold the Superintendent endorsement. Assistant principals or vice-principals are required to hold the School Principal endorsement. Directors of special education are required to hold the Director of Special Education endorsement. Possession of an Administrator Certificate does not entitle the holder to serve as a teacher at a grade level for which the educator is not qualified or certificated. All administrator certificates require candidates to meet the Idaho Standards for School Principals. The Administrator Certificate is valid for five (5) years. Six (6) semester credit hours are required every five (5) years in order to renew the certificate.   (3-20-20)

      a.   School Principal (Pre-K-12) Endorsement. To be eligible for an Administrator Certificate endorsed for School Principal (Pre-K-12), a candidate must have satisfied the following requirements: (3-28-18)

            i.   Hold a master's degree from an accredited college or university.   (3-25-16)

            ii.   Have four (4) years of full-time certificated experience working with students, Pre-K-12, while under contract in an accredited school setting.   (3-25-16)

            iii.   Have completed an administrative internship in a state-approved program, or have one (1) year of experience as an administrator in grades Pre-K-12.   (3-25-16)

            iv.   Provide verification of completion of a state-approved program of at least thirty (30) semester credit hours, forty-five (45) quarter credit hours, of graduate study in school administration for the preparation of school principals at an accredited college or university. This program shall include the competencies of the Idaho Standards for School Principals.   (3-28-18)

            v.   An institutional recommendation is required for a School Principal (Pre-K-12) Endorsement.
(3-28-18)

      b.   Superintendent (Pre-K-12) Endorsement. To be eligible for an Administrator Certificate with a Superintendent (Pre-K-12) endorsement, a candidate must have satisfied the following requirements:
(3-28-18)

            i.   Hold an education specialist or doctorate degree or complete a comparable post-master's sixth year program at an accredited college or university.   (3-25-16)

            ii.   Have four (4) years of full-time certificated/licensed experience working with Pre-K-12 students while under contract in an accredited school setting.   (3-25-16)

            iii.   Have completed an administrative internship in a state-approved program for the superintendent endorsement or have one (1) year of out-of-state experience as an assistant superintendent or superintendent in grades Pre-K-12.   (3-25-16)

            iv.   Provide verification of completion of an approved program of at least thirty (30) semester credit hours, or forty-five (45) quarter credit hours, of post-master's degree graduate study for the preparation of school superintendents at an accredited college or university. This program in school administration and interdisciplinary supporting areas shall include the competencies in Superintendent Leadership, in additional to the competencies in the Idaho Standards for School Principals.   (3-28-18)

            v.   An institutional recommendation is required for a School Superintendent Endorsement (Pre-K-12).   (3-28-18)

      c.   Director of Special Education (Pre-K-12) Endorsement. To be eligible for an Administrator Certificate endorsed for Director of Special Education (Pre-K-12), a candidate must have satisfied all of the following requirements: (3-28-18)

            i.   Hold a master's degree from an accredited college or university;   (3-25-16)

            ii.   Have four (4) years of full-time certificated/licensed experience working with students Pre-K-12, while under contract in a school setting;   (3-25-16)

            iii.   Obtain college or university verification of demonstrated the competencies of the Director

of Special Education in Idaho Standards for Initial Certification of Professional School Personnel;   (3-28-18)

iv.   Obtain college or university verification of demonstrated competencies in the following areas, in addition to the competencies in the Idaho Standards for School Principals: Concepts of Least Restrictive Environment; Post-School Outcomes and Services for Students with Disabilities Ages Three (3) to Twenty-one (21); Collaboration Skills for General Education Intervention; Instructional and Behavioral Strategies; Individual Education Programs (IEPs); Assistive and Adaptive Technology; Community-Based Instruction and Experiences; Data Analysis for Instructional Needs and Professional Training; Strategies to Increase Program Accessibility; Federal and State Laws and Regulations and School District Policies; Resource Advocacy; and Technology Skills for Referral Processes, and Record Keeping;   (3-28-18)

v.   Have completed an administrative internship in the area of administration of special education; and   (4-11-19)

vi.   An institutional recommendation is required for Director of Special Education (Pre-K-12) endorsement.   (3-28-18)

04.   Certification Standards For Career Technical Educators. Teachers of career technical courses or programs in secondary schools must hold an occupational specialist certificate and an endorsement in an appropriate occupational discipline. All occupational certificates must be approved by the Division of Career Technical Education regardless of the route an individual is pursuing to receive the certificate.   (3-28-18)

05.   Degree Based Career Technical Certification.   (3-25-16)

a.   Individuals graduating from an approved occupational teacher preparation degree program qualify to teach in the following ~~five~~ seven (~~5~~7) disciplines: agricultural science and technology; business technology education; computer science technology; engineering; family and consumer sciences; marketing technology education; and technology education. Occupational teacher preparation course work must meet the Idaho Standards for the Initial Certification of Professional School Personnel. The occupational teacher education program must provide appropriate content to constitute a major in the identified field. Student teaching shall be in an approved program and include experiences in the major field. Applicants shall have accumulated one thousand (1,000) clock hours of related work experience or practicum in their respective field of specialization, as approved by the Division of Career Technical Education. The certificate is valid for five (5) years. Six (6) semester credit hours are required every   five

(5) years pursuant to Section 060 of these rules.   (3-28-18)

b.   The Career Technical Education Administrator certificate is required for an individual serving as an administrator, director, or manager of career technical education programs at the state Division of Career Technical Education or in Idaho public schools. Individuals must meet one (1) of the two (2) following prerequisites to qualify for the Career Technical Education Administrator Certificate. The certificate is valid for five (5) years. Six (6) semester credit hours are required every five (5) years pursuant to   Section   060   of   these   rules   to renew.   (3-28-18)

(3)   Qualify for or hold an Advanced Occupational Specialist certificate or hold an occupational endorsement on a ~~standard instructional~~degree based career techncial certificate; provide evidence of a minimum of four (4) years teaching, three (3) of which must be in a career technical discipline; hold a master's degree; and complete at least fifteen (15) semester credits of administrative course work.   (3-28-18)

(1)   Applicants must have completed credits in: education finance, administration and supervision of personnel, legal aspects of education; and conducting evaluations using the statewide framework for teacher evaluations.   (3-28-18)

(2)   Additional course work may be selected from any of the following areas: administration and supervision of occupational programs; instructional supervision; administration internship; curriculum development; curriculum evaluation; research in curriculum; school community relations; communication;

teaching the adult learner; coordination of work-based learning programs; and/or measurement and evaluation.   (3-28-18)

i.   Hold a superintendent or principal (Pre-K-12) endorsement on a standard administrator certificate and provide evidence of a minimum or four (4) years teaching, three (3) of which must be in a career technical discipline or successfully complete the Division of Career Technical Education twenty-seven (27) month Idaho career technical education leadership institute.   (3-28-18)

~~c.   Work Based Learning Coordinator Endorsement. Educators assigned to coordinate approved work-based experiences must hold the Work Based Learning Coordinator endorsement. To be eligible, applicants must hold an occupational endorsement on the Standard Instructional Certificate or qualify for an Occupational Specialist Certificate, plus complete course work in coordination of work-based learning programs.   (3-29-17)~~

~~d.   Career Counselor Endorsement. The endorsement for a Career Counselor may be issued to applicants who hold a current Pupil Service Staff Certificate with a School Counselor (K-12) endorsement, and who have satisfied the following career technical requirement: Career Pathways and Career Technical Guidance; Principles/Foundations of Career Technical Education; and Theories of Occupational Choice.   (3-28-18)~~

06.   Industry-Based Occupational Specialist Certificate. The industry-based Occupational Specialist Certificates are industry-based career technical certifications issued in lieu of a degree-based career technical certificate. Certificate holders must meet the following eligibility requirements: (3-28-18)

a.   ~~Be at least twenty-two (22) years of age; document recent, gainful employment in the area for which certification is requested; p~~Possess either a high school diploma or General Educational Development (GED) certificate; meet provisions of Idaho Code; and, verify technical skills through work experience, industry certification or testing as listed below. When applicable, requirements of occupationally related state agencies must also be met. Since educational levels and work experiences vary, applicants may be determined ~~highly~~ qualified under any one (1) of the following three (3) options: (3-28-18)

i.   Have ~~six~~ three (~~6~~3) years or ~~twelve~~ six thousand (~~12~~6,000) hours of recent, gainful employment in the occupation for which certification is requested, at least half of which must have been during the immediate previous five (5) years. ~~Up to forty-eight (48) months credit or up to eight thousand (8,000) hours can be counted toward the six (6) years or twelve thousand (12,000) hours on a month-to-month basis for journeyman training or completed postsecondary training in a career technical education program~~; or   (3-28-18)

ii.   Have a baccalaureate degree in the specific occupation or related area, plus ~~two~~ one (~~2~~1) years or ~~four~~ two thousand (~~4~~2,000) hours of recent, gainful employment in the occupation for which certification is ~~required~~requested, at least half of which must have been during the immediate previous five (5) years; or   (3-28-18)

iii.   ~~Have completed a formal apprenticeship program in the occupation or related area for which certification is requested plus two (2) years or four thousand (4,000) hours of recent, gainful, related work experience, at least half of which must have been completed in the immediate previous five (5) years~~Hold or have held an ~~n~~ industry certification in a field closely related to the content area in which the individual seeks to teach as approved by the Division of Career Technical Education.   (3-28-18)

b.   Limited Occupational Specialist Certificate. This certificate is issued to individuals who are new to teaching in Idaho public schools or new to teaching in career technical education in Idaho public schools. The certificate is an interim certificate and is valid for three (3) years and is non-renewable. Applicants must meet all of the minimum requirements established in Subsection 015.06.a. of these rules. Individuals on a limited occupational specialist certificate must complete one (1) of the two (2) following pathways during the validity period of the certificate: (3-28-18)

i.   Pathway I - Coursework: Within the three-year period of the Limited Occupational Specialist Certificate, the instructor must satisfactorily complete the pre-service training prescribed by the

Division of Career Technical Education and demonstrate competencies in principles/foundations of occupational education and methods of teaching occupational education. Additionally, the instructor must satisfactorily demonstrate competencies in two (2) of the following areas: career pathways and guidance; analysis, integration, and curriculum development; and measurement and evaluation. (3-28-18)

ii. Pathway II – Cohort Training: Within the first twelve (12) months, the holder must enroll in the Division of Career Technical Education sponsored ~~two-year cohort~~ training and complete ~~the two (2) training~~ within the three-year validity period of the interim certificate. (3-28-18)

c. Standard Occupational Specialist Certificate. (3-28-18)

i. This certificate is issued to individuals who have held a limited occupational specialist certificate and completed one (1) of the pathways for completions. (3-28-18)

ii. The Standard Occupational Specialist Certificate is valid for five (5) years. Six (6) semester credit hours are required every five (5) years pursuant to Section 060 of these rules to renew. Credit equivalency will be based on verification of forty-five (45) hours of participation at approved technical conferences, institutes, or workshops where participation is prorated at the rate of fifteen (15) hours per credit; or one hundred twenty (120) hours of approved related work experience where hours worked may be prorated at the rate of forty (4) hours per credit; or any equivalent combination thereof, and having on file a new professional development plan for the next certification period. (3-28-18)

d. Advanced Occupational Specialist Certificate. This certificate is issued to individuals who: (3-29-17)

i. Are eligible for the Standard Occupational Specialist Certificate; (3-28-18)

ii. Provide evidence of completion of a teacher training degree program or eighteen (18) semester credits of Division of Career Technical Education approved education or content-related course work in addition to the twelve (12) semester credits required for the Standard Occupational Specialist Certificate (a total of thirty (30) semester credits); and (3-28-18)

iii. Have on file a new professional development plan for the next certification period. (3-28-18)

iv. The Advanced Occupational Specialist Certificate is valid for five (5) years. Six (6) semester credit hours are required every five (5) years pursuant to Section 060 of these rules to renew. (3-28-18)

07. Postsecondary Specialist. A Postsecondary Specialist certificate will be granted to a current academic faculty member whose primary employment is with any accredited Idaho postsecondary institution. To be eligible to teach in the public schools under this postsecondary specialist certificate, the candidate must supply a recommendation from the employing institution (faculty's college dean). The primary use of this state-issued certificate is for distance education, virtual classroom programs, and public and postsecondary partnerships. (3-20-20)

a. Renewal. This certificate is good for five (5) years and is renewable. To renew the certificate, the renewal application must be accompanied with a new written recommendation from the postsecondary institution (faculty's college dean level or higher). (3-25-16)

b. Fees. The fee is the same as an initial or renewal certificate as established in Section 066 of these rules. (3-20-20)

c. The candidate must meet the following qualifications: (3-25-16)

i. Hold a master's degree or higher in the content area being taught; (3-25-16)

ii. Be currently employed by the postsecondary institution in the content area to be taught; and (3-25-16)

iii. Complete and pass a criminal history background check as required by Section 33-130, Idaho Code. (3-20-20)

08. American Indian Language. Each Indian tribe shall provide to the State Department of Education the names of those highly and uniquely qualified individuals who have been designated to teach the tribe's native language in accordance with Section 33-1280, Idaho Code. Individuals identified by the tribe(s) may apply for an Idaho American Indian Certificate as American Indian languages

teachers. (3-25-16)

      a. The Office of Indian Education at the State Department of Education will process an application that has met the requirements of the Tribe(s) for an American Indian languages teacher. (3-25-16)

      b. Once an application with Tribal approval has been received, it will be reviewed and, if approved, it will be forwarded to the Office of Certification for a criminal history background check as required in Section 33- 130, Idaho Code. The application must include a ten--finger fingerprint card or scan and a fee for undergoing a background investigation check pursuant to Section 33-130, Idaho Code. (3-28-18)

      c. The Office of Certification will review the application and verify the applicant is eligible for an Idaho American Indian Certificate. The State Department of Education shall authorize an eligible applicant as an American Indian languages teacher. An Idaho American Indian Certificate is valid for not more than five (5) years. Individuals may apply for a renewal certificate. (3-25-16)

      09. **Junior Reserved Officer Training Corps (Junior ROTC) Instructors.** (3-25-16)

      a. Each local education agency with a Junior ROTC program shall provide the State Department of Education a list of individuals who have completed an official armed forces training program to qualify as Junior ROTC instructors in high schools and a notarized copy of their certificate(s) of completion. (3-20-20)

      b. Authorization Letter. Upon receiving the items identified in Subsection 015.09.a., the State Department of Education shall issue a letter authorizing these individuals as Junior ROTC instructors. (3-20-20)

      10. **Additional Renewal Requirements**. In addition to specific certificate or endorsement renewal requirements, applicants must meet the following renewal requirements as applicable: (3-25-16)

      c. Administrator certificate renewal. In order to recertify, holders of an administrator certificate must complete a course consisting of a minimum of three (3) semester credits in the Idaho framework for teachers' evaluation pursuant to Section 33-1204, Idaho Code. Credits must be earned through an approved educator preparation program and include a laboratory component. The laboratory component must include in-person or video observation and scoring of teacher performance using the statewide framework for teacher's evaluation. The approved course must include the following competencies: (3-28-18)

      i. Understanding professional practice in Idaho evaluation requirements, including gathering accurate evidence and artifacts, understanding and using the state framework for evaluation rubric with fidelity, proof of calibration and interrater reliability, ability to provide effective feedback for teacher growth, and understanding and advising teachers on individualized learning plan and portfolio development. (3-28-18)

      ii. Understanding student achievement and growth in the Idaho evaluation framework, including understanding how measurable student achievement and growth measures impact summative evaluation ratings and proficiency in assessment literacy. (3-28-18)

028. **PROFESSIONAL ENDORSEMENT.**
Eligibility for the professional and advanced professional endorsement pursuant to Section 33-1201A, Idaho Code, may be established by providing additional evidence demonstrating effective teaching for the purpose of determining proficiency and student achievement in the event required standards for the professional endorsement are not met. (4-11-19)

      01. **Measurable Student Achievement and Student Success Indicators**. Evidence of a majority of the applicable staff person's students meeting measurable student achievement targets, or student success indicator targets, may be demonstrated by the certificated staff member providing evidence that students from an accredited private or out-of-state public school have met targets set by the certificated staff member. The measurable student achievement or student success indicators must be comparable to the measurable student achievement or student success indicator targets established by the hiring school for

certificated staff in similar employment areas and similar grade ranges pursuant to Section 33-1001, Idaho Code.   (4-11-19)

02.   Performance Criteria. Evidence ~~of an overall rating of proficient, and no components rated as unsatisfactory on the state framework for teaching evaluation~~of meeting the performance criteria as applicable to the professional or advanced professional endorsement pursuant to Section 33-1001, Idaho Code, may be provided through the submittal of annual evaluations showing standards aligned to the Idaho framework for teaching evaluation standards.   (4-11-19)

03.   Validity of Evidence. Evidence provided must show that the certificated staff member met each of the proficiency and student achievement requirements in each year required, pursuant to section 33-1201A, Idaho Code.   (4-11-19)

04.   Evaluation of Evidence. The local education agency administrator shall be responsible for evaluating the evidence provided and determining alignment with the school district or charter schools measurable student achievement and student success indicators and alignment with the Idaho framework for teaching evaluation standards. The reviewing administrator shall sign an affidavit stating the evidence meets the district and state standards for measurable student achievement and student success indicators and performance criteria. The local education agency shall report the equivalent performance criteria rating the certificated staff member received and indicate if any equivalent components were rated as unsatisfactory and the measurable student achievement or student success indicator used with verification that the majority of their students have met the measurable student achievement targets or student success indicators. Targets must be comparable to targets set for like groups of students at the hiring school. The state board of education or state department of education may request to review the evidence provided for determining proficiency and student achievement.   (4-11-19)

UNIVERSITY OF IDAHO

SUBJECT

Pending Rule IDAPA 08.05.01, Rules Governing Seed and Plant Certification

REFERENCE

August 11, 2016	Board approved proposed rule changes to IDAPA 08.05.01 incorporating amended seed certification standards (Rapeseed/Canola/ Mustard Certification Standards).
November 28, 2016	Board approved pending rule IDAPA 08.05.01, Rules Governing Seed and Plant Certification (Rapeseed/Canola/ Mustard Certification Standards)
August 2017	Board approved updated standards and proposed rule changes to the potato seed certification standards regarding corky ring rot.
November 2017	Board approved pending rule changes.
August 2018	Board approved proposed rule, updating the Idaho potato certification standards.
November 8, 2018	Board approved pending rule, updating the Idaho potato certification standards.
June 2019	Board approved a legislative idea amending chapter 15, title 22, Idaho Code and removing the requirement that seed certification standards be promulgated through administrative code.
August 2019	Board approved legislation amending chapter 15, title 22, Idaho Code and removing the requirement that seed certification standards be promulgated through administrative code.

APPLICABLE STATUTE, RULE, OR POLICY

Title 22, Chapter 15, specifically Sections 22-1504 and 22-1505, Idaho Code.
Idaho Administrative Code, IDAPA 08.05.01, Rules Governing Seed and Plant Certification.

BACKGROUND/DISCUSSION

During the 2014 calendar year, the University of Idaho and the Board took action to address compliance within statutory requirements related to certification of seeds, tubers, plants and plant parts in the State of Idaho as required by the Seed and Plant Certification Act of 1959 (Idaho Code, Chapter 15, Title 22). The Board incorporated into Board rules, by reference, the existing published Standards for Certification of the Idaho Crop Improvement Association, Inc. (ICIA). These existing published standards were created through committees consisting of an ICIA Board established process of working with various seed crop, seed grower and processors to create and then continuously update the standards. Standards, and any revisions to existing standards, are then presented to the Foundation Seed Stock Committee within the Agriculture Experiment Station at the University of Idaho for approval.

During the 2020 Legislative Session the Board put forward legislation (S1248) amending chapter 15, title 22, Idaho code, removing the requirement that seed certification standards be promulgated through administrative code. S1248 passed the legislature unanimously and was signed by the Governor. With the authorization for establishing seed certification in Administrative Code removed, the Board must now go through the rulemaking process to vacate IDAPA 08.05.01.

IMPACT
Approval of the amendment as a proposed rule will allow the rule to move forward through the rulemaking process, allowing the rule to go for public comment and then return to the Board for consideration as a pending rule in November.

ATTACHMENTS
Attachment 1 – Proposed Rule – Docket 08-0501-2001

STAFF COMMENTS AND RECOMMENDATIONS
Administrative rules are made up of three types of rules, temporary rules, proposed rules and pending rules. Temporary and proposed rules may be promulgated jointly with a single docket number or temporary rules may be promulgated as a standalone rule. The Notice of Intent to Promulgate Rules is required prior to publishing the notice of a proposed rule unless the agency has determined that informal negotiated rulemaking is not feasible. Pursuant to the Division of Administration, Office of Administrative Rules guidance, these may include the following:
- there is a need for temporary rulemaking;
- the change is simple in nature;
- those affected by the rule are not easily identifiable;
- those affected by the rule are not likely to reach a consensus on the proposed changes; or
- the rulemaking is being done to comply with a state or federal statute or court order.

The proposed amendments to IDAPA 08.05.01 are not feasible to negotiate prior to the notice of the proposed rulemaking, the changes are being done to comply with a state statute change, and they are simple in nature.

Proposed rules approved by the Board are published in the Idaho Administrative Rules Bulletin. Following publication there is a 21-day comment period. Based on received comments and Board direction, changes may be made to proposed rules prior to entering the pending stage. Pending rules are then brought back to the Board for consideration. Once approved, pending rules will be submitted to the Department of Administration for publication in the Idaho Administrative Rules Bulletin and are then forwarded to the legislature for consideration. Pending rules become effective at the end of the legislative session in which they are submitted, if they are not rejected by the Legislature.

Staff recommends approval.

BOARD ACTION

I move to approve proposed rule Docket 08-0501-2001, vacating the chapter in its entirety as provided in Attachment 1.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

08.05.01 – RULES GOVERNING SEED AND PLANT CERTIFICATION

000. LEGAL AUTHORITY.
This chapter is adopted under the authority of Title 22, Chapter 15, Idaho Code. (4-6-15)

001. TITLE AND SCOPE.

   01. Title. The title of this chapter is IDAPA 08.05.01, "Rules Governing Seed and Plant Certification," by Idaho Crop Improvement Association, Inc. (4-6-15)

   02. Scope. These rules govern the standards and procedures for the certification of seeds, tubers, plants, or plant parts in the state of Idaho by the Regents of the University of Idaho through the Idaho Agricultural Experiment Station in the College of Agricultural and Life Sciences and its duly authorized agent, Idaho Crop Improvement Association, Inc., as an agent and instrumentality and servant of the State. (4-6-15)

002. WRITTEN INTERPRETATIONS.
In accordance with Section 67-5201(19)(b)(iv), Idaho Code, any written interpretations of the rule of this chapter will be made available at the Idaho State Board of Education office. (4-6-15)

003. ADMINISTRATIVE APPEAL.
There is no provision for administrative appeals before the Board under this chapter. Hearing and appeal rights are set forth in Title 67, Chapter 52, Idaho Code. (4-6-15)

004. INCORPORATION BY REFERENCE.
The following documents are incorporated by reference into this rule. The Idaho Seed and Plant Certification Standards are adopted by the Idaho Crop Improvement Association. Copies of the following documents may be obtained from the Idaho Crop Improvement Association, Inc. website at http://www.idahocrop.com/index.aspx, or from the Idaho Crop Improvement Association, Inc. office. (4-6-15)

   01. Prohibited Noxious Seed in Idaho Certified Seed. The standard Prohibited Noxious Seed in Idaho Certified Seed of the Idaho Crop Improvement Association, Inc., as last modified and approved on March 17, 2015. (3-25-16)

   02. Seed Certification Fee & Application Schedule. The Seed Certification Fee and Application Schedule of the Idaho Crop Improvement Association, Inc., as last modified and approved on July 11, 2014. (4-6-15)

   03. Idaho Alfalfa Certification Standards. The Idaho Alfalfa Certification Standards adopted by the Idaho Crop Improvement Association, Inc., as last modified and approved on March 17, 2015. (3-25-16)

   04. Idaho Bean Certification Standards. The Idaho Bean Certification Standards adopted by the Idaho Crop Improvement Association, Inc., as last modified and approved on March 17, 2015. (3-25-16)

   05. Idaho Red Clover Certification Standards. The Idaho Red Clover Certification Standards adopted by the Idaho Crop Improvement Association, Inc., as amended and approved on March 17, 2015. (3-25-16)

   06. Idaho Chickpea Certification Standards. The Idaho Chickpea Certification Standards adopted by the Idaho Crop Improvement Association, Inc., as amended and approved on March 17, 2015. (3-25-16)

   07. Idaho Grain Certification Standards. The Idaho Grain Certification Standards adopted by the Idaho Crop Improvement Association, Inc., as amended and approved on February 28, 2017. (3-28-18)

   08. Idaho Grass Certification Standards. The Idaho Grass Certification Standards adopted by the Idaho Crop Improvement Association, Inc., as amended and approved on March 17, 2015. (3-25-16)

09. **Idaho Rapeseed/Canola/Mustard Certification Standards**. The Idaho Rapeseed/Canola/Mustard Certification Standards adopted by the Idaho Crop Improvement Association, Inc., as amended and approved on April 26, 2016. (3-29-17)

10. **Idaho Potato Certification Standards**. The Idaho Potato Certification Standards adopted by the Idaho Crop Improvement Association, Inc., as amended and approved on January 16, 2018. (4-11-19)

11. **Pre-Variety Germplasm Certification Regulations in Idaho**. The Pre-variety Germplasm Certification Regulations adopted by the Idaho Crop Improvement Association, Inc., as amended and approved March 17, 2015. (3-25-16)

12. **Idaho Lentil Certification Standards**. The Idaho Lentil Certification Standards adopted by the Idaho Crop Improvement Association, Inc., as amended and approved March 17, 2015. (3-25-16)

13. **Idaho Blue Flax Certification Standards**. The Idaho Blue Flax Certification Standards adopted by the Idaho Crop Improvement Association, Inc., as amended and approved March 17, 2015. (3-25-16)

14. **Idaho Milkvetch Certification Standards**. The Idaho Milkvetch Certification Standards adopted by the Idaho Crop Improvement Association, Inc., as amended and approved March 17, 2015. (3-25-16)

15. **Idaho Pea Certification Standards**. The Idaho Pea Certification Standards adopted by the Idaho Crop Improvement Association, Inc., as amended and approved March 17, 2015. (3-25-16)

16. **Idaho Sanfoin Certification Standards**. The Idaho Sanfoin Certification Standards adopted by the Idaho Crop Improvement Association, Inc., as amended and approved March 17, 2015. (3-25-16)

17. **Idaho Birdsfoot Trefoil Certification Standards**. The Idaho Birdsfoot Trefoil Certification Standards adopted by the Idaho Crop Improvement Association, Inc., as amended and approved March 17, 2015. (3-25-16)

18. **Idaho White Clover Certification Standards**. The Idaho White Clover Certification Standards adopted by the Idaho Crop Improvement Association, Inc., as amended and approved March 17, 2015. (3-25-16)

19. **Idaho Penstemon Certification Standards**. The Idaho Penstemon Certification Standards adopted by the Idaho Crop Improvement Association, Inc., as amended and approved March 17, 2015. (3-25-16)

005. OFFICE – OFFICE HOURS – MAILING ADDRESS AND STREET ADDRESS.

01. **Physical Addresses**. The main office of the Idaho Crop Improvement Association, Inc. is located at 429 SW 5th Avenue, Suite 105, Meridian, ID 83642. The branch offices are located at: 1680 Foote Drive, Idaho Falls, ID 83402; 5920 N Government Way, Suite 10, Dalton Gardens, ID 83815; 2283 Wright Avenue, Suite C, Twin Falls, ID 83303. (4-6-15)

02. **Office Hours**. Office hours are 8 a.m. to 5 p.m., Mountain Time, Monday through Friday, except holidays. These office hours apply to each branch. (4-6-15)

03. **Mailing Addresses**. The mailing address for the Idaho Crop Improvement Association, Inc. main office is 429 SW 5th Avenue, Suite 105, Meridian, ID 83642. The branch offices mailing addresses are: 1680 Foote Drive, Idaho Falls, ID 83402; 5920 N Government Way, Suite 10, Dalton Gardens, ID 83815; 2283 Wright Avenue, Suite C, Twin Falls, ID 83303. (4-6-15)

04. **Telephone Numbers**. The telephone number for the Idaho Crop Improvement Association, Inc. main office is (208) 884-8225. The telephone numbers for the branches are: Idaho Falls (208) 522-9198; Dalton Gardens (208) 762-5300; Twin Falls (208) 733-2468. (4-6-15)

05. **Fax Numbers**. The fax number for the Idaho Crop Improvement Association Inc. main office is (208) 884-4201. The fax numbers for the branches are: Idaho Falls (208) 529-4358; Dalton Gardens (208) 762-5335; Twin Falls (208) 733-4803. (4-6-15)

006.   PUBLIC RECORDS ACT COMPLIANCE.
These rules are public records available for inspection and copying at the Idaho Crop Improvement Association Inc., and the State Law Library.   (4-6-15)

007. -- 009.   (RESERVED)

010.   DEFINITIONS.
In addition to the definitions set forth in Title 22, Chapter 15, Idaho Code, the definitions found in the standards of the Idaho Crop Improvement Association, Inc., incorporated by reference in Section 004 of these rules, apply to these rules.   (4-6-15)

011.   (RESERVED)

012.   APPLICABILITY.
These rules apply to all seeds, tubers, plants, or plant parts located in, imported into, or exported from the state of Idaho that have an application for certification properly filed with a seed certification agency.   (4-6-15)

013.   OFFICIAL IN CHARGE OF CERTIFIED SEED.
The Idaho Legislature, at its 35th Session, enacted Senate Bill No. 107, the "Seed and Plant Certification Act of 1959". This Act designated the Regents of the University of Idaho, through the Agricultural Experiment Station of the College of Agriculture, as the seed certifying agency for the State. This Act further gives the Regents of the University of Idaho the authority to designate an agent to administer and conduct the certification program. The Regents of the University of Idaho on April 27, 1959, appointed the Idaho Crop Improvement Association, Inc., as its duly authorized agent to administer and conduct seed certification in Idaho as provided by the Seed and Plant Certification Act of 1959.   (4-6-15)

014.   SEED CERTIFICATION FEE AND APPLICATION SCHEDULE.
The Idaho Crop Improvement Association may assess a fee to defray the costs of seed testing and administration of the seed certification program. Fees are established through the Idaho Crop Improvement Association, Inc.   (4-6-15)

015.010.   -- 999.   (RESERVED)

SUBJECT
Proposed Omnibus Fee Rule Docket 08-0000-2000F

REFERENCE

May 2019	Board approved temporary and proposed rules extending all rules codified June 30, 2019.
February 2020	Board approved temporary omnibus fee rule

BACKGROUND/DISCUSSION
Each year Idaho's codified administrative code is scheduled to expire on June 30th. As part of the legislature's annual duties during the legislative session they consider a bill to extend the codified rules until June 30th of the following year. During the 2020 Legislative Session this bill did not pass and all previously codified rules expired on June 30, 2020. To mitigate the potential confusion this could cause and ensuing potential liability to the state for not implementing many provision required by statute or the state constitution, the Governor authorized the approval of temporary rules through an omnibus process that would reinstate the rules on a temporary basis effective July 1, 2019 and start the rule promulgation process with a temporary rule for each section of the Idaho Administrative Procedures Act (IDAPA). The Division of Financial Management requested each agency submit a conditional temporary omnibus rule by February 21, 2020. These temporary rules were approved by the Board at the February 2020 Regular Board meeting. Following that action, it was determined that the 2019 omnibus rules that had been accepted by at least one body of the legislature did not need to be re-promulgated and only the fee rules needed to go through the re-promulgation process. Pending fee rules require approval by both legislative bodies to take effect.

Each section of Administrative Code is divided by an IDAPA number, then title and chapter. As an example, IDAPA 08.02.01 is IDAPA 08, Title 02, Chapter 01. Administrative rules promulgated by the Board of Education encompass two sections of IDAPA including 14 chapters. Two chapters are found in IDAPA 55 pertaining to Career Technical Education. Twelve chapters are found in IDAPA 08 and pertain to all other public education.

The Division of Financial Management has requested each agency or board responsible for administrative rules submit one proposed rule that covers all fees. This is the same consolidation of rule sections that was used for the temporary rule approved by the Board in February.

The proposed fee rule will cover the following sections and fees:

- 08.01.11, Registration of Postsecondary Educational Institutions and Proprietary Schools (Collected by the Office of the State Board of Education):
  - Subsection 200.07 Registration Fee, Postsecondary Educational Institutions
  - Subsection 300.06 Registration Fee, Proprietary Schools

➢ Annual registration fee for initial registration or renewal of registration is equal to one-half of one percent (.5%) of the gross Idaho tuition revenue of the institution and proprietary schools during the previous tax reporting year (Jan 1 - Dec 31), but not less than one hundred dollars ($100) and not to exceed five thousand dollars ($5,000).

- 08.02.02, Rules Governing Uniformity
  - Subsection 066 Fees, Educator Certification(Collected by the State Department of Education)
    - ➢ Initial Certificate $75.00
    - ➢ Renewal Certificate $75.00
    - ➢ Alternate Route Authorization $100
    - ➢ Additions or Changes to an Existing Certificate $25
    - ➢ Replace an Existing Certificate $10
    - ➢ Subsection 075.03, Fingerprinting and Background Investigation Checks(Collected by the State Department of Education)
  - Fingerprinting Processing Fee, All Applicants (excluding volunteers) $28.25
    - ➢ Fingerprinting Processing Fee, Volunteers $26.25

- 08.02.03, Rules Governing Thoroughness
  - Subsection 128, Curricular Materials Selection and Online Course Approval(Collected by the State Department of Education)
    - ➢ Curricular Materials Review submission fee $60 or an amount equal to the retail price of each curricular material

IMPACT

Approval of the proposed omnibus rules will start the process necessary for the promulgation of pending rule for the Legislature's consideration in 2021.

ATTACHMENTS

Attachment 1 – Proposed Fee Rule Docket 08-0000-2000F

STAFF COMMENTS AND RECOMMENDATIONS

Temporary rules go into place upon approval by the Board or on a date set by the Board through Board action at the time of approval. The date for approval of these temporary rules is when the legislature adjourns *sine die*. The Office of Administrative Rules in the Division of Financial Management updates the effective date of pending rules upon adjournment of the legislature. Temporary rules expire at the end of the next legislative session and only go to the legislature if there is a request to extend them beyond the current year. For the temporary rule approved by the Board in February to go forward to the 2021 Legislature as a final rule, the Board must now consider the proposed fee rule. Like the previous omnibus rules, the proposed omnibus fee rule will be published by the Department of Administration in a special bulletin. The pending (or final rule) will come back to the Board for consideration in the fall after the close of the 21 day comment period. As part of the omnibus process for re-promulgating the fee rules this year there

are no changes allowed between the temporary rule and proposed rule. Any changes to the fee rule would have had to been promulgated through a separate process.

Staff recommends approval.

BOARD ACTION

I move to approve the proposed omnibus fee docket notice, IDAPA 08-0000-2000F, as provided in attachment 1.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

<div align="right">**ATTACHMENT 1**</div>

IDAPA 08 - STATE BOARD OF EDUCATION
DOCKET NO. 08-0000-2000F (FEE RULE)

NOTICE OF OMNIBUS RULEMAKING - PROPOSED ~~FEE~~ RULEMAKING

AUTHORITY: In compliance with Sections 67-5221(1), Idaho Code, notice is hereby given that this agency has initiated proposed rulemaking procedures. The action is authorized pursuant to Sections 33-118, 33-130, 33-1205, 33-2402 and 2403, Idaho Code.

PUBLIC HEARING SCHEDULE: Oral comment concerning this rulemaking will be scheduled in accordance with Section 67-5222, Idaho Code.

DESCRIPTIVE SUMMARY: The following is the required finding and concise statement of the purpose of the proposed rulemaking:

This proposed rulemaking re-publishes the following existing temporary rule chapters previously submitted to and reviewed by the Idaho Legislature under IDAPA 08, rules of the State Board of Education:

IDAPA 08:
- 08.01.11, Registration of Postsecondary Educational Institutions and Proprietary Schools:
  - Subsection 200.07 Registration Fee, Postsecondary Educational Institutions
  - Subsection 300.06 Registration Fee, Proprietary Schools
- 08.02.02, Rules Governing Uniformity
  - Subsection 066 Fees, Educator Certification
  - Subsection 075.03, Fingerprinting and Background Investigation Checks
- 08.02.03, Rules Governing Thoroughness
  - Subsection 128, Curricular Materials Selection and Online Course Approval

FEE SUMMARY: This rulemaking does not impose a fee or charge, or increase a fee or charge, beyond what was previously submitted to and reviewed by the Idaho Legislature in the prior rules.

The fees or charges, authorized in Sections 33-118, 33-130, 33-1205, 33-2402 and 2403, Idaho Code, are part of the agency's 2020 budget that relies upon the existence of these fees or charges to meet the state's obligations and provide necessary state services. Failing to reauthorize these temporary rules would create immediate danger to the state budget, immediate danger to necessary state functions and services, and immediate danger of a violation of Idaho's constitutional requirement that it balance its budget.

The following is a specific description of the fees or charges:
IDAPA 08.01.11 (Collected by the Office of the State Board of Education)
Annual registration fee for initial registration or renewal of registration is equal to one-half of one percent (.5%) of the gross Idaho tuition revenue of the institution and proprietary schools during the previous tax reporting year (Jan 1 - Dec 31), but not less than one hundred dollars ($100) and not to exceed five thousand dollars ($5,000).

IDAPA 08.02.02.066 (Collected by the State Department of Education)
- Initial Certificate $75.00
- Renewal Certificate $75.00
- Alternate Route Authorization $100
- Additions or Changes to an Existing Certificate $25
- Replace an Existing Certificate $10

IDAPA 08.02.02. Background Check/Fingerprinting (Collected by the State Department of Education)

- Fingerprinting Processing Fee, All Applicants (excluding volunteers) $28.25
- Fingerprinting Processing Fee, Volunteers $26.25

IDAPA 08.02.03 (Collected by the State Department of Education)
- Curricular Materials Review submission fee $60 or an amount equal to the retail price of each curricular material

FISCAL IMPACT: The following is a specific description, if applicable, of any negative fiscal impact on the state general fund greater than ten thousand dollars ($10,000) during the fiscal year: This rulemaking is not anticipated to have any fiscal impact on the state general fund because the FY2021 budget has already been set by the Legislature, and approved by the Governor, anticipating the existence of the rules and fees being reauthorized by this rulemaking.

NEGOTIATED RULEMAKING: Pursuant to Section 67-5220(2), Idaho Code, negotiated rulemaking was not feasible because engaging in negotiated rulemaking for all previously existing rules will inhibit the agency from carrying out its ability to serve the citizens of Idaho and to protect their health, safety, and welfare.

INCORPORATION BY REFERENCE: Pursuant to Section 67-5229(2)(a), Idaho Code, incorporated material may be obtained or electronically accessed as provided in the text of the proposed rules attached hereto.

ASSISTANCE ON TECHNICAL QUESTIONS, SUBMISSION OF WRITTEN COMMENTS: For assistance on technical questions concerning the temporary rule, contact Tracie Bent, Chief Planning and Policy Officer, at (208)332-1582 or tracie.bent@osbe.idaho.gov.

Anyone may submit written comments regarding the proposed rulemaking. All written comments must be directed to the undersigned and must be delivered within twenty-one (21) days after publication of this Notice in the Idaho Administrative Bulletin. Oral presentation of comments may be requested pursuant to Section 67-5222(2), Idaho Code, and must be delivered to the undersigned within fourteen (14) days of the date of publication of this Notice in the Idaho Administrative Bulletin.

DATED this August 19, 2020.

Tracie Bent, Chief Planning and Policy Officer
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