Board Meeting
December 21, 2022
East Wing 42
Idaho State Capitol
700 W Jefferson Street
Boise, ID 83702

Public Streaming: https://www.idahoptv.org/shows/idahoinsession/ew42/

Wednesday, December 21, 2022 – 9:00 a.m. (MT)

BOARDWORK

1. Agenda Review / Approval – Action Item
2. Minutes Review / Approval – Action Item
3. Rolling Calendar – Action Item

CONSENT

BAHR

1. Boise State University - Four (4) Online Program Fees – Action Item
2. Boise State University – Ada County Highway District Permanent Easement - Joyce Avenue – Action Item
3. University of Idaho – Leave Policies and Employee Leave Benefits for University Positions Policy Amendments – Action Item
4. University of Idaho – License Agreement for Sprint/T-Mobile Communication Equipment on "I" Tank – Action Item
5. University of Idaho – South Campus Chiller Plant Replacement and Improvements – Action Item
6. University of Idaho – Kibbie Dome Building Electrical Service Replacement – Action Item
7. FY 2022 Financial Statement Audits - Action Item

IRSA

8. General Education Matriculation Committee Appointments – Action Item
9. Graduate Medical Education Committee Appointments – Action Item
10. Math Common Course Index Update – Action Item

PPGA

11. State Rehabilitation Council Appointments – Action Item

SDE

12. Emergency Provisional Certificates – Action Item
13. Professional Standards Commission – Praxis Assessments and Qualifying Scores Recommendations – Action Item

OPEN FORUM

STATE BOARD OF EDUCATION
650 W. State Street • P. O. Box 83720 • Boise, ID 83720-0037
208/334-2270 • FAX: 208/334-2632
www.boardofed.idaho.gov

WORK SESSION

PLANNING, POLICY AND GOVERNMENTAL AFFAIRS

A. K-20 Education Strategic Plan and Performance Measure Discussion

STATE DEPARTMENT OF EDUCATION

1. K-12 Developments – Information Item
2. Idaho Reading Indicator – Fall Results – Information Item
3. NAEP Results – Information Item
4. Assessment Review Committee Recommendations – Action Item

INSTRUCTION, RESEARCH AND STUDENT AFFAIRS

1. Board Policy III.N. – Statewide General Education – First Reading – Action Item
2. Board Policy III.E. – Certificates and Degrees – Second Reading – Action Item
3. Board Policy III.Z. – Planning and Delivery of Postsecondary Programs and Courses – Second Reading – Action Item
4. Open Educational Resources (OER) Report – Information Item

BUSINESS AFFAIRS AND HUMAN RESOURCES

1. Board Policy V.H. and V.Y. – Internal Audit – Second Reading - Action Item
2. FY 2022 Financial Ratios - Information Item
3. FY 2022 Net Position Reports - Information Item

PLANNING, POLICY AND GOVERNMENTAL AFFAIRS

1. Idaho Technology Council – Digital Literacy Presentation – Information Item
2. Educator Preparation Programs – Performance Report – Action Item
3. Board Policy – IV.B. – Educator Certification – Endorsement Requirements – Second Reading - Action Item
4. Dyslexia Handbook – Action Item
5. College of Southern Idaho – Taxing District Expansion – Action Item

INFORMATIONAL

BAHR

1. Retirement Plan Committee – Optional Retirement Plan RFP – Information Item

SDE

2. Mastery Education Update – Information Item
3. English Language Learners Proficiency Report – Information Item
4. Professional Standards Commission – Annual Report – Information Item

If auxiliary aids or services are needed for individuals with disabilities, please contact the Board office at 208-334-2270. If you wish to speak at Open Forum the deadline to sign up to speak is 9:00 a.m. (MT), December 19, 2022. While the Board attempts to address items in the listed order, some items may be addressed by the Board prior to, or after the order listed.

1. Agenda Approval

Changes or additions to the agenda.

BOARD ACTION
I move to approve the agenda as posted.

2. Minutes Approval

BOARD ACTION
I move to approve the minutes for the October 19-20, 2022 Regular Board meeting and the November 14, 2022 Special Board meeting.

3. Rolling Calendar

BOARD ACTION
I move to set December 13, 2023 as the date for the December 2023 regularly scheduled Board Meeting to occur via videoconference originating in Boise.

AND

I move to amend the dates for May 2023 Board Retreat to May 11, 2023.

DRAFT Minutes October 19-20, 2022

STATE BOARD OF EDUCATION MEETING
October 19-20, 2022
Lewis-Clark State College
Williams Conference Center
801-899 4th Street
Lewiston, ID 83501

A regular meeting of the Idaho State Board of Education was held at Lewis-Clark State College on October 19-20, 2022. Board President Liebich called the meeting to order at 1:00 p.m. (PT).

Present

Kurt Liebich, President
Dr. David Hill, Secretary
Shawn Keough
Cally Roach
Cindy Siddoway
William G. Gilbert, Jr.
Superintendent Sherri Ybarra

Absent

Dr. Linda Clark, Vice-President

Wednesday, October 19, 2022 – 1:00 p.m. (PT)

BOARD ACTION
Superintendent Ybarra asked for unanimous consent to move State Department of Education agenda Tab #6 to the later portion of today's meeting instead of addressing it tomorrow. A roll call vote was taken, and the motion carried 7-0. Dr. Clark was absent from voting.

BOARDWORK

1. Agenda Review / Approval

BOARD ACTION
M/S (Hill / Keough) I move to approve the agenda as modified. A roll call vote was taken, and the modified motion carried 7-0. Dr. Clark was absent from voting.

2. Minutes Review / Approval

BOARD ACTION
M/S (Hill / Roach) I move to approve the minutes for the August 24, 2022, Regular Board meeting and to approve the amended minutes for February 17, 2022 and April 20-21 Regular Board meetings. A roll call vote was taken, and the motion carried 7-0. Dr. Clark was absent from voting.

3. Rolling Calendar

BOARD ACTION
M/S (Hill / Keough) I move to set October 18-19, 2023, as the date and Lewis-Clark State College as the location for the October 2023 regularly scheduled Board meeting. A roll call vote was taken, and the motion carried 7-0. Dr. Clark was absent from voting.

CONSENT

BAHR

1. Boise State University – Master Lease Agreement – Student Housing

BOARD ACTION
M/S (Hill / Roach) I move to authorize Boise State University's President or her designee to execute the lease agreement and related documents for the premises located at 818 W. Ann Morrison Park Drive in Boise, Idaho, in substantial conformance with the attached draft and to take further actions as are necessary to complete the transaction. A roll call vote was taken, and the motion carried 7-0. Dr. Clark was absent from voting.

2. Idaho State University - Multi-Year Employment Agreement – Head Men's Basketball Coach

BOARD ACTION
M/S (Hill / Roach) I move to approve the request by Idaho State University to enter into a four-year, seven-month employment agreement with Ryan Looney, Head Men's Basketball Coach, commencing on October 20, 2022 and terminating on May 7, 2027, at a base salary of $139,287 and supplemental compensation provisions as submitted. A roll call vote was taken, and the motion carried 7-0. Dr. Clark was absent from voting.

3. Idaho State University - Multi-Year Employment Agreement – Head Women's Volleyball Coach

BOARD ACTION
M/S (Hill / Roach) I move to approve the request by Idaho State University to enter into a three-year, three-month employment agreement with Sean Carter, Head Women's Volleyball Coach, commencing on October 20, 2022 and terminating on

January 20, 2026, at a base salary of $78,000 and supplemental compensation provisions, as submitted. A roll call vote was taken, and the motion carried 7-0. Dr. Clark was absent from voting.

IRSA

4. Graduate Medical Education Committee Appointments

BOARD ACTION

M/S (Hill / Roach) I move to appoint Dr. Perry Brown Jr., Dr. Abby Davids, Dr. Robyn Dreibelbis and Dr. Matthew Larsen to serve on the Graduate Medical Education Committee effective immediately and expiring June 30, 2027. A roll call vote was taken, and the motion carried 7-0. Dr. Clark was absent from voting.

AND

M/S (Hill / Roach) I move to reappoint Dr. Mary Barinaga, Dr. Justin Glass, Dr. John Grider, Dr. Melissa Hagman, Susie Keller, Dr. Samantha Portenier, Dr. Kimberly Stutzman, and Dr. William Woodhouse to serve on the Graduate Medical Education Committee effective immediately and expiring June 30, 2027. A roll call vote was taken, and the motion carried 7-0. Dr. Clark was absent from voting.

PPGA

5. Indian Education Committee Appointments

BOARD ACTION

M/S (Hill / Roach) I move to appoint Mr. Jesse LaSarte, representing the Coeur d'Alene Tribe to the Idaho Indian Education Committee effective October 19, 2022 and expiring June 30, 2026. A roll call vote was taken, and the motion carried 7-0. Dr. Clark was absent from voting.

AND

M/S (Hill / Roach) I move to appoint Ms. Jennifer Porter, representing the Kootenai Tribe of Idaho to the Idaho Indian Education Committee effective October 19, 2022 and expiring June 30, 2027. A roll call vote was taken, and the motion carried 7-0. Dr. Clark was absent from voting.

AND

M/S (Hill / Roach) I move to appoint Dr. Tim Thornes, representing Boise State University to the Idaho Indian Education Committee effective October 19, 2022 and expiring June 30, 2027. A roll call vote was taken, and the motion carried 7-0. Dr. Clark was absent from voting.

6. Data Management Council Appointments

BOARD ACTION

M/S (Hill / Roach) I move to approve the appointment of Dr. Lindsey Brown to the Data Management Council as the Registrar representative commencing immediately and ending June 30, 2023. A roll call vote was taken, and the motion carried 7-0. Dr. Clark was absent from voting.

SDE

7. Professional Standards Commission Appointment

BOARD ACTION

M/S (Hill / Roach) I move to appoint Stephanie Brodwater of Post Falls School District to the Professional Standards Commission for the remainder of the term she is assuming, beginning immediately and ending June 30, 2025, representing certificated classroom teachers. A roll call vote was taken, and the motion carried 7-0. Dr. Clark was absent from voting.

8. Emergency Provisional Certificates

BOARD ACTIONS

M/S (Hill / Roach) I move to approve the request by State Department of Education for one-year emergency provisional certificates in the Instructional and CTE endorsement area(s) at the specified school districts as provided herein for the 2022-2023 school year for the following individuals: Killie Cheney, Patricia Dowdy, Henry Molet, Rhiannon Terry, Kristi Dorris, Dawn O'Connell, Lewis Jones, MarissaTurner, Janelle Marie Kristina LaSalle, Ryan Allen, Hannah Meehan, Melissa Diaz, McKeyan Howell, Bryton Pancheri, Caden Bailey, Lily Bowers, Charles Rehdorf, Ryan Anderson, Mario Betancourt, Melinda Butkus, Alexander Hobson, Arielle Elizabeth Metz, Shawna Staley, Tanya Tellez, Joelle Anthon, Marian Christensen Searle, Faithe Warrell, Penn Peterson, Charmane Davis, Julian Slotten, Kathleen Smith, Emily Osterhout, Jarret Nuxoll, Sherry Curnutt, Katie Lemire, Amy Myers, Sara Meeks, Sadie Foote, Akayla Garner, Norma Gonzalez, Jean Hale, Janelle Ortiz, Nancy Schut, Kallie Stanger, Jennifer Struchen, Gabriel Cobabe, San Juana Valero Acosta, Emma Van Every, Grace Van Every, Alison Weikle, Amanda Winters, Ashlyn Jacobsen, Janessa Wilson, Caitlyn Dover-Pearson, Courtney Hildebrand, Brandi Lake, Jared Moore, Mardine Olsen, Tracy Bratcher, Brandi Burrup, Gary Rindlisbacher, Tabetha Seebert, Haily Crompton, Natasha Dixon, Thane Thomas, Kayla Harris, Holly Mortimer, Jessica Olsen, Mashalee Thomas, Tiffany Ford, and Kerena Clifton. A roll call vote was taken, and the motion carried 7-0. Dr. Clark was absent from voting.

AND

M/S (Hill / Roach) I move to approve the request by State Department of Education for one-year emergency provisional certificates in the School Psychologist endorsement area at the specified school districts as provided herein for the 2022-2023 school year for the following individuals: Laurie Bowcutt, Nicholas Davis, Christopher Tucker, Emily Shryrock, and Phylicia Lee. A roll call vote was taken, and the motion carried 7-0. Dr. Clark was absent from voting.

9. Curricular Materials Review Committee Recommendations

BOARD ACTION
M/S (Hill / Roach) I move to approve the recommendation of the Curricular Materials Selection Committee to adopt curricular materials and related instructional materials for K-12 mathematics and K-12 English language learner, as submitted in Attachment 1. A roll call vote was taken, and the motion carried 7-0. Dr. Clark was absent from voting.

BOARD ACTION
M/S (Hill / Roach) I move to approve the consent agenda. A roll call vote was taken, and the motion carried 7-0. Dr. Clark was absent from voting.

Board President Liebich mentioned that starting on November 1, 2022 the Executive members of the Board will begin holding a Community Forum on the four community college campuses. The rotation will be as follows; November 2022 to College of Southern Idaho, April 2023 to North Idaho College, Fall 2023 to College of Eastern Idaho and Spring 2024 to College of Western Idaho.

BOARD OF TRUSTEES – LEWIS-CLARK STATE COLLEGE
LEWIS-CLARK STATE COLLEGE COMMUNITY FORUM

1. The following students from Lewis-Clark State College (LCSC) addressed the Board. They were Sarah Yenor, Taten Gorton, Victoria "Jay" Raulerson, Kerby Cole, Caden Massey, Emma Hartley, Doug Bauer.

Mr. Gilbert asked what makes LCSC special to them in the face of the other institutions in the state. The students said since so many of the teachers are alums of LCSC it is very helpful because they understand what the students are going through. They also like that there are so many locals part of the campus, and the small class sizes at LCSC leads them to having real connection with others in the class. The small community feel is helpful because the prevailing answer was that the professors actually seem to care about the students, and their long-term success.

Dr. Hill asked how hard is it to be a local student. The students said being local has its ups and downs. Being local is the most affordable option since they get to live at home, however it does make it harder to meet people. Joining campus groups and activities in order to meet new people has made all the difference.

Matt Freeman, Executive Director, Idaho State Board of Education, asked what can the Board do better in getting information to first generation students. The students shared that having one-on-one attention from someone at LCSC to answer student questions or in giving them direction was very helpful. Having the Warrior One-Stop on campus was also helpful in getting information to students.

Board President Liebich asked Doug Bauer what made him return to school after having a successful career, and to return as an older student. Mr. Bauer said it was something he always wanted to do and he plans to take one or two classes a semester until he gets his master's degree. He hopes to finish his degree before his daughter graduates.

Mr. Gilbert asked Mr. Bauer, as a newspaper person how do you get LCSC's story out to the public beyond the local area. Mr. Bauer said LCSC does a good job of getting their story out to the local public. Recruiting efforts are affective but one avenue where they can reach out to a broader audience would be for LCSC to expand on the promotion of the portfolio program. This program allowed him to use prior work/life experience to earn college credits and that boost helped him decide to finish his degree.

There were no further comments or questions from the Board.

2. The following professors and staff members from Lewis-Clark State College addressed the Board. They were Dr. Nina Peterson, Dr. Alex Bezzerides, Dr. Gene Straughan, J.R. Kok, Dr. Sue Hasbrouck, Lindsey Hight, Kristin Myers, Lauren Grijalva.

Mr. Freeman said there is a lot of interest in our state to increase the high school graduation requirement by adding 1 or 2 credits for coding under computer science and he wanted their thoughts. Dr. Peterson thought that was a great idea. The problem initially was that some of the high school teachers did not have endorsements in teaching computer science courses, but that has changed significantly. Math and Science teachers specifically were the most successful in getting the teaching endorsement. Dr. Bezzerides concurred that for modern science requirements students need to know how to code and not having that skill is a disadvantage to them.

Mr. Freeman said if this becomes a high school graduation requirement then every high school senior would need a course in coding and he wanted to know if everyone thought that was a fair requirement. The teachers said that the students who enter computer science courses and take coding love taking it. They see real world applications in knowing how to code, and knowing how to code before entering college would be a huge advantage for all students because they can use it in almost every science and math course. Most of the teachers represented on the panel concurred and said that coding would be helpful across all disciplines and its to the student's advantage to have this skill.

Mr. Gilbert asked the teachers what resources could they use to advance LCSC's mission and to make them more successful. The response was that staff turnover is something that needs to be addressed and a period of rebuilding is important. Having more resources is always going to be important for them to continue their mission. Growing faculty infrastructure will help in ensuring that students who need services do not fall through the cracks. Part of that discussion needs to be compensation for faculty and staff since Idaho ranks 44th in salaries, which does not lead to hiring top talent to work in Idaho.

Board President Liebich asked what the moral was like on campus as it relates to the pre-pandemic world. Everyone said the students love being back on campus. Two positives that can be seen are that the teachers became better online instructors and the students learned how to become better self-learners during the pandemic. The one concern raised was learning to handle the students who will be coming to college who are underprepared due to the way they were taught during the pandemic. Many of them are ill prepared academically for what lies ahead, and that lays the burden on their college instructor to get them up to speed.

There were no further comments or questions from the Board.

At this time the Board took a 10-minute break returning at 2:30 p.m. (PT)

PLANNING, POLICY AND GOVERNMENTAL AFFAIRS

1. Dr. Cynthia Pemberton, President, Lewis-Clark State College, gave the College's annual report. She began by acknowledging that LCSC is on the indigenous homelands of the Nimiipuu - Nez Perce Tribe. She acknowledged the Nimiipuu as original caretakers since time immemorial and recognized their continuing connection to the land, to the water, and to their ancestors. She expressed her appreciation and respect for the ongoing relationship built between Lewis-Clark State College and the Nez Perce Tribe.

She then shared the following with the Board.

1. LCSC has been serving students since 1893.
2. Tuition for one year at LCSC is $6996 which makes it a very affordable option.
3. Post grad placements rates are 9 percent for Career Technical Education (CTE) and 98 percent for academic.
4. LCSC works closely with the other colleges / universities in Idaho and they have articulation agreements with
    a) BSU (Masters of social work)
    b) ISU (Public health and Coaching/Athletic Admin graduate articulation)
    c) UI (Engineering, MS Math training, pre-law)
    d) CEI, CWI, CSI, NIC (Pharm Tech, Phys Therapy Asst., Dental Hygiene)
5. Eighty percent of the students who attend LCSC are Idaho natives. Many of them are first generation students, half are Pell eligible, and many work full time.
6. Seventy percent of LCSC's employed graduates stay in Idaho.

7. Total enrollment headcount shows that enrollment is up 2 percent; male student enrollment is up 8 percent which bucks the national trend and LCSC's degree seeking, first time in / transfer students are up 13.6 percent this year.
8. Current rate of student retention is 63 percent. The goal is 70 percent, or higher, which LCSC hopes to attain in 3-4 years.
9. To increase enrollment LCSC is running an aggressive billboard campaign. Forty-three billboards will host advertising during the course of the next year telling everyone how LCSC is Idaho's affordable four-year institution. The overall campaign spend will be $323,900 which will result in a multimedia presence throughout the state and region.
10. Outreach to Adult Learners includes the following; hiring of an Adult Learning Coordinator and an Extended Hour Mental Health Counselor. For Adult Learners there are 8-week courses and extended hours for student and support services. There is also a Prior Learning Assessments and a Portfolio program where students can get credits for past work experience.
11. One of the most exciting programs was the development of a Correctional Education Initiative. Many of these students are eligible for the second chance pell program. LCSC is poised to be the live and hybrid state leader / provider to Idaho Correctional Institutions statewide.
12. The Career Readiness Credential is the second micro credential connected to students sharpening their transferrable, durable, career skills and to make earning/acquiring/demonstrating these skills evident to students and employers. This accompanies the leadership credential.
13. LCSC is proud to share with the Board the following external validation rankings.
    - ✓ #10 top public school in the west region by U.S. News & World Reports (2022)
    - ✓ #2 overall in Idaho by College Consensus (2022)
    - ✓ #2 online college in Idaho by College Consensus (2022)
    - ✓ #1 in the nation for non-traditional students by Best College Reviews (2022)
    - ✓ #1 ranked nursing program in Idaho among four-year institutions by RegisteredNursing.org (2022) – 2 years in a row!
    - ✓ #4 Radiographic science online program in the nation by EduMed.org (2022)
    - ✓ #1 Nursing RN to BSN online program in Idaho by RNtoMSN.org (2021)

Board President Liebich asked what did LCSC do to increase the percentage of enrollments among male students. Dr. Pemberton said dual credit was having an impact in males enrolling as well as male students entering the Humanities.

Dr. Hill asked if there was a need for an infrastructure investment to help LCSC attain the 70 percent or higher student retention mentioned. Dr. Pemberton said yes, LCSC will need to see some growth in personnel infrastructure to accommodate this growth. And some of this strategy will need to encompass how to rebuild staffing numbers to continue to service LCSC's students.

There were no further comments or questions from the Board.

INSTRUCTION, RESEARCH AND STUDENT AFFAIRS

1. Board Policy – III.E. – Certificates and Degrees – First Reading

Dr. TJ Bliss, Chief Academic Affairs Officer, Idaho State Board of Education said there were a lot of changes made by the institutions. One of these changes was the definition of what a microcredential, a stacked microcredential and a digital badge are.

A microcredential is awarded for mastery of defined skills or concepts, including career technical and academic skills. Microcredentials reflect skills, knowledge, and abilities gained in increments and measured by identified outcomes that are equal to or less than a single course of study but may also build upon or complement each other, resulting in a stacked microcredential. Microcredentials are most often distributed as digital badges.

A stacked microcredential is a set of organized microcredentials that an individual can earn after meeting specific outcomes. Completion of stacked microcredentials may result in credit through institutions' prior learning assessment policies.

A digital badge is a visual representation of one or more microcredentials. Digital badges, in compliance with standards recognized by the Division of Career Technical Education, are embedded with metadata that are verifiable and portable.

BOARD ACTION

M/S (Roach / Hill) I move to approve the first reading of proposed amendments to Board Policy III.E. Certificates and Degrees as submitted in Attachment 1. A roll call vote was taken, and the motion carried 7-0. Dr. Clark was absent from voting.

Dr. Hill asked if these definition terms allow for any pathway through and for the student to acquire the credential and have it available to them in some form. Dr. Bliss said currently if you wanted to connect a microcredential to a credit bearing credential such as an associate's degree that is an option. More work needs to be done to link the microcredentials into the credit bearing curriculum.

There were no further comments or questions from the Board.

2. Board Policy – III.Z. – Planning and Delivery of Postsecondary Programs and Courses – First Reading

Dr. Bliss said Board staff worked with the provosts and presidents of all eight institutions to develop the new criteria for evaluating proposals by the universities to offer new associate degrees and proposals by the community colleges to offer bachelor's degrees. All parties agreed that Policy III.Z. is the appropriate place to include these criteria in Board policy.

The Council on Academic Affairs and Programs, the President's Leadership Council, and the Instruction, Research and Student Affairs Committee of the Board reviewed the proposed policy amendments at their meetings in August, September, and October 2022, respectively.

Mrs. Roach stated that the goal of this Board Policy is so that the universities are not competing with the community colleges for general studies or associate's degrees.

BOARD ACTION
M/S (Roach / Hill) I move to approve the first reading of proposed amendments to Board Policy III. Z. Planning and Delivery of Postsecondary Education Programs and Courses as submitted in Attachment 1. A roll call vote was taken, and the motion carried 7-0. Dr. Clark was absent from voting.

There were no comments or questions from the Board.

3. Established Program to Stimulate Competitive Research (EPSCoR) Annual Report

Andy Kliskey, Director of ID EPSCoR, gave the annual report. He shared that the Established Program to Stimulate Competitive Research (EPSCoR) is a federal-state partnership designed to enhance the science and engineering research, education, and technology capabilities of states that traditionally have received smaller amounts of federal research and development funds. Through EPSCoR, participating states are building a high-quality academic research base that is serving as a backbone of a scientific and technological enterprise.

The Idaho EPSCoR committee oversees the implementation of the Idaho EPSCoR program and ensures program goals and objectives are met. The Idaho EPSCoR office and the Idaho EPSCoR Project Director are located at the University of Idaho. Partner institutions are Boise State University and Idaho State University.

The purpose of EPSCoR awards is to provide support for lasting improvements in a state's academic research infrastructure and its research and education capacity in areas that support state and university Science and Technology Strategic Plans. Idaho EPSCoR activities include involvement in K-12 teacher preparation and research initiatives and projects ranging from undergraduate research through major state and regional research projects.

Dr. Hill asked that since the current EPSCoR program requires a 20 percent state match to take advantage of this program presented today does that mean the state would need to increase the availability of state funds. Mr. Kliskey said that was correct, if the goal was to support multiple track lines.

There were no further comments or questions from the Board.

BUSINESS AFFAIRS AND HUMAN RESOURCES (35 min)

1. Board Policy Amendments – Sections V.H. and V.Y. – Internal Audit – First Reading

Gideon Tolman, Chief Financial Officer, Idaho State Board of Education, reviewed the amended Board Policy for the Board. He shared that at its June 7, 2022 meeting, the Audit Committee provided final comments on amendments to Board Policy V.H. and the repeal of Board Policy V.Y. The changes move the provisions of Policy V.Y. to Policy V.H. and change the title of the Audit Committee to the Audit, Risk and Compliance Committee to better reflect the scope of the committee's work.

The amendments include:

- Incorporating key portions of the audit committee charter into board policy and board bylaws. The separate audit committee charter will be eliminated, and Board Policy V.H. and the bylaws will serve as the audit committee charter going forward.
- Providing changes to internal audit sections needed to meet professional internal audit standards and to reflect the new consolidated structure.
- Aligning audit-related sections of Board Policy V.H. and the bylaws.
- Adding general language addressing the consolidated risk management function.
- Moving Committee responsibilities into one policy section.
- Adding language to provide for co-sourcing audit arrangements.
- Updating language related to confidential reporting lines.
- Providing general updates to Board Policy V.H.

The Audit Committee section of the Board's bylaws was amended and presented to the Board as a first reading at the August 24, 2022 meeting. The second reading of the Board's bylaws will be considered at this Board meeting through the Policy, Planning, and Governmental Affairs portion of the agenda.

BOARD ACTION

M/S (Gilbert / Roach) I move to approve the first reading of Board Policy V.H. and to repeal Board Policy V.Y. as presented in Attachments 1 and 2. A roll call vote was taken, and the motion carried 7-0. Dr. Clark was absent from voting.

There were no comments or questions from the Board.

2. Board Policy – Section V.Z. – Medical Education Reimbursement Program – Second Reading

Mr. Tolman said there were no changes made between first and second reading. As a recap he said this policy is in response to a new law passed during the 2022 legislative session. Section 33-3731, Idaho Code, which requires medical students in the WWAMI

or University of Utah School of Medicine programs who receive a subsidized seat to reimburse the State of Idaho for the state subsidy if the students do not practice in Idaho for four years following degree completion.

BOARD ACTION
M/S (Gilbert / Roach) I move to approve the second reading of Board Policy V.Z., Medical Education Reimbursement Program as submitted in Attachment 1. A roll call vote was taken, and the motion carried 7-0. Dr. Clark was absent from voting.

Board President Liebich asked how this policy was going to be administered. Mr. Tolman said the policy includes delegation of authority to the University of Idaho to administer the reimbursement program, definitions of terms, calculation of repayments, and uses of reimbursed funding.

Before beginning medical education through the University of Utah or WWAMI programs, students will be required to sign a "Return to Practice Medicine in Idaho" agreement acknowledging the provisions of Idaho Code § 33-3731 and committing to reimburse the state if they fail to meet the stated requirements. The University of Idaho will keep track of students and request repayment if need be.

Mrs. Roach asked if there were any positive or negative reactions from students over this policy change. Dr. Jeff Seegmiller, Director of the WWAMI Medical Education Program, University of Idaho, said students have been applying for the 2023 class and they are well into applying for medical school at both the University of Utah and the University of Washington School of Medicine as a WWAMI applicant. As of right now there have not been a significant downturn in the number of applicants due to this policy change.

There were no further comments or questions from the Board.

3. Boise State University – Stadium Expansion – Planning and Design Approval

Jeramiah Dickey, Director of Athletics, Boise State University (BSU), said Boise State University (BSU) seeks Board approval to expand the North End Zone of Albertsons Stadium.

This expansion will include premium seating options that include field level suites, loge boxes, club seats, as well as a general seating area. It also includes a club room space that will be used on non-game days as a training table facility (i.e. an on-site dining program tailored to the individual needs of each of BSU's 18 sports programs) to feed the 350 student-athletes.

If approved, BSU will issue a request for proposals for design-build services with an agreement for design services in an amount not to exceed $2.5 million. Consistent with Board policy, BSU will return to the Board for construction approval once the design

process is complete and the construction budget is set. Financing approval may be secured at that time or, if debt financing is necessary, at a subsequent Board meeting, as required by Board policy.

BOARD ACTION
M/S (Gilbert / Hill) I move to approve the request by Boise State University to issue a request for proposals for design-build services for the North End Zone expansion project, to select a design-build team, and to proceed with design and planning for a cost not to exceed $2.5 million. A roll call vote was taken, and the motion carried 7-0. Dr. Clark was absent from voting.

There were no comments or questions from the Board.

4. University of Idaho - State of Idaho Land Board Agreements regarding CAFÉ Property

Mr. Brian Foisy, Vice-President, Division of Finance and Administration and Kent Nelson, General Counsel, University of Idaho (UI), reviewed the policy for the Board starting with how in 2019 the Regents acquired 336 acres in Minidoka County for the development of the CAFE dairy site. That parcel adjoins another 302 acres currently owned by the Idaho Dairymen's Association foundation (the Idaho Dairy Environmental Action League Research Foundation, or "IDEAL"). The University of Idaho (UI) is proposing to sell the entire 638 acres to the State of Idaho, Board of Land Commissioners (acting as trustees for the Agricultural College Endowment) for a purchase price of $6 million (the appraised value of the property). IDEAL has agreed to transfer title to its property to the Regents contemporaneously with this sale.

Under the proposed transaction plan, the Endowment would use proceeds earned from the recent sale of its property near Caldwell (the former site of UI's Caldwell Research and Extension Center) to buy the 638-acre CAFE site in Minidoka County. The UI would

then use those proceeds to fund some of the capital projects necessary to make the dairy operational. Additionally, the Endowment would use the balance of its proceeds from the Caldwell sale ($17.25 million) to fund the construction of improvements UI requires for the development and operation of the research dairy. The real property owned by the Endowment would still be managed by UI's College of Agricultural and Life Sciences as part of UI's CAFE project.

To accomplish this transaction and ensure the intended outcomes for both parties, UI and Idaho Department of Lands staff have drafted a Purchase and Sale Agreement and an Agricultural College Endowment Experimental Farm Operations Agreement. The documents create a transaction and operations plan in which the Agricultural College Endowment pays the Regents appraised market value for the land and actual construction costs for selected improvements, and the Regents are granted the rights to

permit the beneficiary of this specific endowment (the agricultural college) to utilize the property indefinitely although only for the purposes of operating an experimental farm.

BOARD ACTION

M/S (Gilbert / Ybarra) I move to approve the University of Idaho's Operations Officer for Finance and Administration to: 1) execute the attached Agricultural College Endowment Experimental Farm Operations Agreement with the Agricultural College Endowment of the State of Idaho (acting by and through the Idaho Board of Land Commissioners) in substantial conformance with Attachment 2; and 2) execute those documents anticipated and required for the disposal of real property as described by the attached Purchase and Sale Agreement. A roll call vote was taken, and the motion carried 7-0. Dr. Clark was absent from voting.

There were no comments or questions from the Board.

At this time the Board took a 15-minute break returning at 4:35 p.m. (PT)

STATE DEPARTMENT OF EDUCATION

6. Annexation/Excision – Lakeland School District #272 and Coeur d'Alene School District #27

Superintendent Ybarra said this agenda item is an annexation request from the Lakeland and Coeur d'Alene school districts. A hearing officer was hired by the State Department of Education and he recommended approval using Idaho Code 33-307 based on the information provided by the districts, and what was in the best interests of the students. The question now before the Board is what code should this be put under. The State Department of Education has brought this type of action forward in previous meetings and Idaho Code 33-307 was used.

Jenifer Marcus, Deputy Attorney General, Idaho State Board of Education explained to the Board the difference in using Idaho Code 33-307 verses Idaho Code 33-308 in this situation. Idaho Code 33-307 addresses situations when there is an error in the legal description, or there is omitted property outside of the school district boundary, or where two school districts include the same property. For Idaho Code 33-307 the Board would make a decision and a correction to the boundary would be made.

Under Section 33-308 which is exclusive to annexations and excisions there is a more onerous process. The Department of Education would still hire a hearing officer who would determine what is in the best interest of the students who are impacted, and looks at the bonded debt to determine if it exceeds the prescribed limit. The final step would be for the matter to be on the ballot for the electorate in those school districts to vote on it.

As outlined in this motion moving forward with using Idaho Code 33-307 means the voters in those two school districts would not get a say in approving this annexation / excision.

Mrs. Keough modified the motion after the discussion.

BOARD ACTON
M/S (Keough / Gilbert) I would move to approve the petition for the alteration of the property between Lakeland School District 272 and Coeur d'Alene School District 271 and to approve both under 33-307 Idaho Code. A roll call vote was taken and the motion passed 6-1. Mrs. Roach voted nay. Dr. Clark was absent from voting.

AND

M/S (Keough / Gilbert) Further have the office of the State Board of Education and the State Department of Education's legal teams work together to make suggested statute changes in 33-307 and 33-308 to forward to the Legislature for future clarity on this issue. A roll call vote was taken and the motion passed 6-1. Mrs. Roach voted nay. Dr. Clark was absent from voting.

Board President Liebich asked for clarification. The hearing officer hired by the State Department of Education recommended following Idaho Code 33-307 based on the language currently in Idaho Code 33-307. Mrs. Marcus said that was correct. That section talks about an error in a legal description and it is the phrase 'or for any other reason' which one would assume refers to corrections, not to a process where avoiding what the legislature has instructed for annexations and excisions is not followed.

Board President Liebich said what also complicates this issue is that a recent annexation request was done under Idaho Code 33-307 in 2019. Mrs. Marcus said that was correct but it was to correct the legal description.

Mrs. Keough asked for clarification on the hearing officers report. It was her understanding that the hearing officer did go through both codes and he chose the one he felt was most accurate, and which was better for the students. Mrs. Marcus said the hearing officers report is Attachment 5 of the State Department of Educations agenda materials. She also said the hearing officer did recommend using Idaho Code 33-307 after a discussion between the two districts, however the voters who live in those districts would not get a say as to if they agreed with the annexation.

Board President Liebich said the State Board of Education normally does not counter the decision of local school board's and both the Coeur d'Alene and Lakeland School District agreed with the direction put forth by the hearing officer to use Idaho Code 33-307. Mrs. Marcus said that was a good point but perhaps a solution would be for the Board to craft a revision of Idaho Code 33-308 to address situations like this and bring that change to the Legislature during the next session.

Mr. Gilbert said the reality is there already was an election as the voters choose the members of the school board who made the decision to go with Idaho Code 33-307. He then asked what the legal risk would be if the Board approved using Idaho Code 33-307 verses Idaho Code 33-308. Mrs. Marcus said it would be hard to predict if anyone would file a challenge to the use of Idaho Code 33-307. If there was a challenge the risk with going with Idaho Code 33-307 would be in unwinding the taxing districts and any voter can challenge the ruling, not just those directly affected by the annexation, such as parents of the children affected.

Mrs. Keough made a statement that if both school boards acted on this item at a local school board meeting, the public has weighed in on the decision already.

Ms. Bent shared that when a district is altered it alters the taxing district and affects the property taxes of the individuals. Part of the risk in not using Idaho Code 33-308 would be if the Legislature feels the Board has over stepped its authority by not following the statute that specifically addresses annexations and excisions. Board President Liebich said unfortunately precedent was set in 2019 when Idaho Code 33-307 was used in a similar decision.

Dr. Hill wanted clarification concerning taxing districts. Could a voter in the district, who had no children, find themselves in a different taxing district and therefore have different taxes. Mrs. Marcus said that was correct and that is why under Idaho Code 33-308 there is an election for the voters to have a say before moving forward on annexation/excision.

Mrs. Roach said reading through the hearing officers report she didn't see any distinction between the two codes. Ms. Bent said hearing officers are normally only hired when Idaho Code 33-308 is used. When Idaho Code 33-307 is used, a hearing officer is not hired but their main purview is to do what is best for the students. There are currently only three students who will be impacted by this change, for now. Superintendent Ybarra stated she has always hired a hearing officer when deciding between Idaho Code 33-307 verses Idaho Code 33-308 and she also runs this decision by her legal team for review before bringing these matters to the Boards attention.

Mr. Freeman asked the Board that no matter which way they decide to go it will be prudent for the Board to state for the record, that any further excisions or annexations have to proceed under Idaho Code 33-308, or until the statutes have been amended stating that the Board has additional discretion in which statue to use.

Dr. Hill asked if it would be prudent for the Board to take no action at this time. Was there anything time sensitive in getting this issue moved forward? Superintendent Ybarra said the districts have already waited a year for a ruling on this matter.

There were no further comments or questions from the Board.

The Board recessed for the evening at 5:13 p.m. (PT)

Thursday, October 20, 2022 – 8:00 a.m. (PT)

Dr. David Hill chaired day two of the meeting in Board President Liebich's absence. Dr. Clark was in attendance via zoom.

STATE DEPARTMENT OF EDUCATION

1. K-12 Developments

Superintendent Ybarra started by mentioning the selection of the 2023 Teacher of the Year. Karen Lauritzen, from Treaty Rock Elementary, is a third-grade teacher who has been teaching for 20 years. Ms. Lauritzen has taught at the Post Falls-based elementary school since 2012. She has served on Treaty Rock's behavioral leadership teams and was the school's own teacher of the year in 2021.

During her 20-year career, Ms. Lauritzen has worked in Arizona and Alaska. She is the vice president of the Post Falls Education Association, a founding member of Citizens for Post Falls Schools and has "successfully advocated" for school levies.

Ms. Lauritzen is a 2002 graduate of the University of Fairbanks in Alaska and holds a Master of Arts in Special Education from Indiana's Ball State University. She is finishing up her Ph.D. in Curriculum and Instruction from the University of Idaho.

Ms. Lauritzen was not in attendance.

Other information items presented were;

- For the CARES or ESSER I fund, 99.75 percent of those funds meant to flow to districts have been expended.
- For ESSER II, as of October 14th, 80 percent of those funds meant to flow to districts have been expended.
- For ESSER III, only 16 percent of those funds have been expended.
- Dyslexia Guidance and Training manual update. SDE has been working with various districts in providing additional requirements regarding the new law.
- There is a new Federal Clean School Bus Program which schools and districts can apply for. The funding is not through the State Department of Education. These are grant opportunities that districts can apply for and is a rebate program. Districts will need to apply, proving that they have ordered new clean busses. What will need to be addressed, is if the Board would allow for payment for installing charging stations for these busses and safety issues as it pertains to using these clean busses. The Board sets these requirements through the Administrative Rule process.

- The Superintendent's Student Advisory Council met recently. After a tour of the Capitol they were asked to fill out a survey to get their feedback in what education policy decisions they believe impact them; what is going right in education and what did they believe needed to be addressed. They imparted the following; 1. The students are very interested in civic participation 2. The advanced opportunity program was high on their list of programs that they supported and wanted to see continued 3. Mental health issues including suicide and bullying were concerns they wanted to discuss mostly to find out what services were available for their peers. 4. They also expressed concern for Students with Disabilities and to make sure they had the resources that they needed. 5. When asked to say what was right with Idaho they mentioned their teachers, but they went a step further and said they were concerned that the teachers' salaries were too low for the work that they do.

The Superintendent then introduced the current 2022 Teacher of the Year to the Board. He is Todd Knight who teaches science, engineering and coding classes to sixth, seventh and eight graders at Crossroads Middle School in Meridian, where he serves as Digital Technology Lead and Science Department Head.

Mr. Knight is a graduate of Meridian High School and holds a bachelor's degree in Elementary Education from Boise State University and a master's of curriculum and instruction in STEM Education from Concordia University.

He finds personalized, relatable ways to communicate scientific data and principles and inspires students to demonstrate what they know in ways that relate to their lives: for example, a research paper on how tackling in football demonstrates Newton's Law of equal and opposite reactions.

Mr. Knight then addressed the Board, saying he wanted to share his students' stories with them. The students expressed concerns about the following;

- Safety in schools; some expressed that they did not feel safe while in school especially in the restrooms.
- Idaho education is good but they don't listen to the students enough.
- Low academic performing students feel undue pressure to preform which adds stress to their day.
- Encouraging good quality teachers to stay in Idaho is very important.

Mr. Gilbert asked Mr. Knight what he thought the biggest challenge was in education today. Is it in how students are evaluated; is it the social emotional learning support; is it safety. Giving the Board a focused way to deal with the major issues would be helpful. Mr. Knight said the answer would depend on who gets asked. Many of his students feel beat down by the education system. More mental health services is becoming necessary for many of the students.

There were no further comments or questions from the Board.

3. Advanced Opportunities Annual Report

Dr. Eric Studebaker, Director of Student Engagement and Safety Coordination, State Department of Education gave the Advanced Opportunities (AO) annual report. He shared the following with the Board.

The AO program has numerous components that include the following.

- Overload course - a course taken that is in excess of a full credit load and outside of the regular school day, including summer courses.
- Dual credit courses - can be taken in a high school aligned course through a local school district or as a college course at college or university and transferred back to a high school transcript.
- Exams – include Advanced placement (AP); International baccalaureate (IB); College-level examination program (CLEP); and Career technical education examinations that lead to an industry-recognized certificate, license, or degree.
- Workforce training courses - help individuals gain skills intended for immediate application within the workforce.
- Early Graduation Scholarship - is earned when a student graduates at least one year early to be utilized at an Idaho public post-secondary institution.
- The AO program impacts nearly 40,000 Idaho students annually. Dual credit is the largest cost to the program at 86 percent of the costs in FY 2022, however the number students that utilize various components of the program is much more diverse. Whereas exams and overload courses consume about 14 percent of the costs, the number of students who utilize these two components of the program is much larger.
- Dual credit costs are broken into two categories; direct tuition costs and out-of-district fees. Out-of-district fees are those fees paid for students attending a community college outside of Twin Falls, Jerome, Bonneville, Kootenai, Ada or Canyon counties. These additional fees are not paid by students and are not encompassed by a student's $4125 allocation. Out-of-district fees were 11 percent of dual credit costs in FY 22.
- Dual credit was offered by all Idaho public institutions with the two largest providers being the College of Western Idaho and the College of Southern Idaho.
- The number of dual credits from FY 21 to FY 22 seems to have recovered from the impact of the pandemic.
- Seventy-five percent of dual credit courses taken by Idaho students are general education courses and not electives.
- Dual credits taken per student has remained at 8 credits in the last few years.
- Participation of Hispanic students is less that the percentage of the statewide comparable data of those eligible by a significant margin. Idaho's post-secondary partners are aware of these statewide numbers and are key in helping address this gap.

- Gender gaps in the program still exist. Male students have a lower participation rate than female students and is even further exaggerated when comparing statewide data. For example, males make up over 51 percent of the statewide student population, but participation is just 44 percent. Whereas 56 percent of females use the program in comparison to 49 percent of student population.
- There has been an increase in the number of students who are maximizing their Advanced Opportunities funds. In total 3,434 students have utilized the allotted $4,125.
- During FY22, SDE awarded 81 Early Graduation Scholarships. These scholarship awards represent students who graduated at least one year early and enrolled in an Idaho post-secondary institution. Last year we saw an 11 percent increase in the number of these students. These students also save the state significant money by eliminating a year of costs related to their public high school education.

Dr. Hill asked about the low number of students entering workforce training. Dr. Studebaker said workforce training courses, as they are currently designed, are not a good fit for minor students (K-12); they are more of an adult education program. However, Idaho's postsecondary schools are beginning to develop new workforce training programs with the idea of being able to support K-12, or high school students.

Dr. Clark asked if there was any data on the number of students taking AO who go-on to some postsecondary education. Dr. Studebaker said the last report he is aware of is two years old and that report resides on the Board of Education's website. Dr. Clark asked for an update of this report from Board staff.

Dr. Clark asked if there was any data on how much money the State is saving by offering AO. Dr. Studebaker said he has not seen any data presented, or collected, representing the savings to the State of Idaho concerning students who do not have to duplicate coursework that they have taken during AO. The savings should be substantial to not only the families, but also to the State. He indicated Board staff should be able to estimate that information using the data they have on hand.

Mrs. Roach asked if it would be helpful to this program if there were more funding for councilors who could encourage more students and parents to be involved in this program. Dr. Studebaker said more money is always a good thing.

There were no further comments or questions from the Board.

4. Less than 10 Pupils in Average Daily Attendance

Superintendent Ybarra reminded the Board that at the November 1999 meeting, the State Board of Education (Board) delegated authority to the State Superintendent of Public Instruction to approve elementary schools to operate with less than ten (10) average daily attendance. A report listing the elementary schools that have requested to operate with

less than ten (10) average daily attendance and whether approval was granted is to be provided to the Board at the October meeting.

Six (6) schools have requested to operate with less than ten (10) average daily attendance during the 2022-2023 school year. Superintendent Ybarra has approved all of the requests. The schools are; Lowman Elementary, Howe Elementary, Prairie Elementary – Jr High School, Pine Elementary Jr High School, Elk City Public School and Three Creek Elementary Jr High School.

There were no comments or questions from the Board.

5. Elementary Secondary Education Act – Consolidated State Plan Amendment

Superintendent Ybarra introduced this agenda item and said, the process the Board uses for making amendments to the Consolidated State Plan includes those amendments first being submitted to the Accountability Oversight Committee (AOC) for their recommendation and then coming to the Board for formal action. Small technical changes or temporary waivers may be submitted directly to the Board for consideration without recommendation from the Accountability Oversight Committee when time is of the essence. On January 20, and February 14, 2022, the AOC discussed both the one-year Consolidated State Plan Addendum and the plans for the long-term Consolidated State Plan Amendment. The Consolidated State Plan Amendment was brought back to the AOC on August 31, 2022, as it related to additional changes to be made that aligned to the committee's previous recommendations. While nearly all of the proposed changes included in the Consolidated State Plan Amendment align to the AOC's feedback and recommendations, there is one area of misalignment. The AOC has consistently recommended that chronic absenteeism be used as a school quality measure for all grades (K-12). The proposed amendment maintains the college and career readiness indicator for high school, but only includes chronic absenteeism for

grades K-8. The AOC had anticipated that chronic absenteeism would be used for school identification, as outlined in the Consolidated State Plan, and that the college and career readiness indicator would remain in Idaho's larger accountability framework (report cards and other reporting), but would not be used for school identification. Since federal law requires at least one school quality measure but allows for more, both could be used if the Board wishes to maintain the college and career readiness indicator for school identification. The college and career readiness indicator are based on student participation in advanced opportunities programs.

BOARD ACTION

M/S (Ybarra / Gilbert) I move to approve the 2022-2023 Amendment to the Elementary and Secondary Education Act of 1965 (ESEA) as amended by Every Student Succeeds Act (ESSA) Consolidated State Plan as provided in Attachment 1, and authorize the Board President to submit the amendment request on behalf

of the State Board of Education. A roll call vote was taken, and the motion carried 7-0. Board President Liebich was absent from voting.

There were no comments or questions from the Board.

7. Temporary Rule – IDAPA 08.02.03.004, Documents Incorporated by Reference – Idaho Standards Achievement Test – Science Achievement Level Descriptors and Idaho Alternate Assessment Achievement Standards

Superintendent Ybarra said each time an assessment is amended, a process is gone through to set new achievement standards identifying the score range for each level of proficiency on the assessment. Ideally, this is done through the approval of a temporary and proposed rule immediately following the earliest administration of the applicable assessment where the standards can reliably be set so that they can be used for scoring the assessment just administered and are then used ongoing until the next time the assessments are changed. For Idaho's statewide assessments that are part of our state and federal accountability system, these achievement standards are necessary for meeting the federal requirements in the Elementary Secondary Education Act for identifying those schools whose student achievement is in the lowest 5 percent of our public schools. The existing achievement standards are based on the previous versions of these two assessments and are no longer appropriate for scoring the assessments administered in the Spring 2022. If the achievement standards are not updated, the State Department of Education will not be able to appropriately score these two assessments or meet the federal requirements for identifying low performing schools. At the October 2021 Board meeting, the Board waived the portion of IDAPA 08.02.03 setting the achievement standards for the Idaho Alternate Assessment (IDAA) for the 2021-2022 school year. For the Idaho Standards Achievement Test (ISAT) Achievement Level Descriptors, all three content areas are included in a single document, therefore, amending one content area requires the amendment and reincorporation of the complete document.

With last years amendments to IDAPA 08.02.03, in moving the ISAT administration from the 10th grade to the 11th grade, a similar process will be needed to consider the 11th grade ISAT achievement standards. A separate request will be submitted for adjusting those achievement standards for use with the Spring 2023 administration of the ISAT. Board staff received no prior request to include the ISAT science and IDAA achievement standards in this year's negotiated rulemaking for the proposed rules being promulgated under Docket 08-0203-2201. The proposed rules include removal of the incorporated documents setting the achievement standards for all of the statewide assessments. If this rule is accepted by the Legislature in 2023, the Board will no longer need to go through the rulemaking process to change these scores. If the rule is rejected, the Board will need to request permission to promulgate a new temporary rule following the 2023 Legislative Session as well as negotiate a new proposed rule incorporating the cut scores on an ongoing basis into IDAPA 08.02.03.004.

BOARD ACTION
M/S (Ybarra/Keough) I move to approve the revised Idaho Standards Achievement Test Achievement Level Descriptors as provided in Attachment 1, the revised Idaho Alternate Assessment Achievement Standards as provided in Attachment 2, and temporary rule amendments to IDAPA 08.02.03.004 as provided in Attachment 3. A roll call vote was taken, and the motion carried 7-0. Board President Liebich was absent from voting.

There were no comments or questions from the Board.

PLANNING, POLICY AND GOVERNMENTAL AFFAIRS

2. Idaho Division of Vocational Rehabilitation – Annual Report

Jane Donnellan, Administrator, Idaho Division of Vocational Rehabilitation, gave the annual report.

She shared the following with the Board.

- The Idaho Division of Vocational Rehabilitation (IDVR) mission is to prepare individuals with disabilities for employment and career opportunities while meeting the needs of the employers and is charged with two major responsibilities: Management of the State/Federal Vocational Rehabilitation (VR) Program and serve as the fiscal agent for the Council for the Deaf and Hard of Hearing (CDHH).
- Vocational Rehabilitation (VR): The VR program is one of the oldest and most successful federal/state programs in the United States. VR serves individuals with severe disabilities that impose significant barriers to gainful employment. VR assists Idahoans with a diverse array of disabilities to prepare, obtain, advance in, and retain employment based on their unique skills and abilities. The VR program provides services to eligible Idahoans with disabilities to assist them in transitioning from unemployment to gainful employment or to maintain employment. The VR program is a way to self-sufficiency and works in concert with the State Rehabilitation Council (SRC), which serves in an advisory capacity.
- Council for the Deaf and Hard of Hearing (CDHH) is an independent agency organized under IDVR. This is a flow-through council for budgetary and administrative support purposes only, with no direct programmatic implication for IDVR. CDHH's vision is to ensure that individuals who are deaf, hard of hearing, or hearing impaired have a centralized location to obtain resources and information about services available.
- There are eight regional offices for VR; Coeur d'Alene, Lewiston, Twin Falls, Pocatello, Idaho Falls, Treasure Valley Central / West / East.
- VR Initiatives for 2023 are Community Rehabilitation Program Improvement and the Apprenticeship Opportunities expansion grant.
- For FY 2022 VR helped 648 students with their post-secondary education and training.

- VR graduates work in a wide range of jobs such as construction, nursing, production, teaching, judgeships. VR graduates earn wages from $22 to $50 an hour in their chosen fields.
- Eleven school districts throughout Idaho partnered with VR to provide students with a paid work-based learning experience during their school day.
- Seventeen school districts partnered with VR to provide students with a paid work-based learning experience during the summer. One hundred twenty-nine students participated in this program.
- VR worked with five schools who each had CTE programs to create a program tailored to the students in such diverse experiences as culinary arts, small engine repair and welding; auto mechanic; home repair remodeling, robotics and wood working.
- More than 1500 business engagement plans were in place in FY 2021.
- Challenges persist in the hiring of qualified counselors. To mitigate current staff leaving VR worked with the Division of Financial Management and Division of Human Resources to offer a $5,000 retention bonus to qualified counselors. That bonus was offered to 55 current counselors.

There were no comments or questions from the Board.

3. Next Steps Idaho Update

Sara Scudder, College and Career Access Officer, Idaho State Board of Education gave the Board an update on the Next Steps Idaho (NSI) program.

She informed the Board of the following.

- The number of new visitors to the NSI website has grown by over 22 percent in the past year.
- Returning visitors have also increased by over 22 percent.
- On average the typical student spends over five minutes reviewing the NSI website which means they are looking at more than two pages.
- The greatest increases in usage are coming from Idaho's most rural communities.
- As of today, over 10,000 portfolio users have accessed the website in the past year.
- Most of the NSI users are in 8th and 9th grade because that is when they can start their career pathway plans.
- Top activities in portfolios are the Learning Styles Assessments that students can take and information on scholarships.
- <u>Goals for NSI</u>
  - increase website traffic from rural schools by 20 percent year over year
  - increase the number of schools and organizations they are working with from 200 to 250 with 50 percent of these being rural schools
  - increase unique authenticated users by 300 percent

- provide 60 training and support sessions (5 per month) for schools, districts, and adult connectors and support adoption of portfolios by student and adult users alike

- Enhancements for NSI
  - Improvements to make the metrics and login management system easier for districts, administrators, teachers and counselors, and connectors for adults
  - Upgrades to portfolios for adult users and specifically designed activity plans for our adult-serving agencies
  - Resume builder and cover letter generator to build out the activities to get people into careers
  - Deeper integration with Idaho Launch and Idaho Works from Career NSI Career Cards and the site's career information content sections
  - Addition of national school information along with a college discovery center to highlight Idaho's institutions
  - Addition of a programs and majors module with links to Idaho colleges' programs
  - Expansion of scholarship listings to include national opportunities
  - Development of additional curriculum, adding tools for 7th grade and including lessons that meet Idaho CTE's First Steps standards
- Outreach for NSI
  - Hold bi-weekly Education Sessions
  - Workshops with counselors
  - Continuation of individualized training opportunities
  - Digital and broadcast ad campaigns
  - Public relations efforts
  - Presentations to associations of school administrators, agency stakeholders, and other connectors (those who can use Next Steps Idaho with those they serve)
- How Can the Board Help NSI?
  - Schedule a one-on-one training and become more familiar with the site
  - Talk to schools, employers, families in your life and community about how they can use Next Steps Idaho
  - Share our outreach materials (https://nextsteps.idaho.gov/media-kit)
  - Follow Next Steps Idaho on Facebook & Instagram and share posts with your audiences. Add an endorsement in your "share"

Dr. Hill asked if there was any data to tell how far NSI has reached into rural communities and how far did they still need to go. Mrs. Scudder said she can give anecdotal data about how many times she and her staff have visited rural school districts but nothing in firm numbers.

Mrs. Roach asked if Mrs. Scudder noticed any challenges with broadband access in the rural areas and could the Board help with that. Mrs. Scudder said one of the things that

NSI has tried to do is to make the website available via a student's phone if they do not have web access.

Mrs. Keough said in some rural areas cell phone service is not available as many of the providers are no longer investing in cell phone towers since the population is not there. She wondered if the Board should perhaps discuss this issue further. Dr. Clark asked Matthew Reiber, Education Liaison, Office of the Governor, if he knew more about the federal investment funds for broadband service and he said he would look into this matter further and report back to the Board at a later time.

There were no further comments or questions from the Board.

4. Board Policy – IV.B – Educator Certification – Endorsement Requirements – First Reading

Ms. Bent reviewed the changes requested during the 2022 legislative session.
The proposed amendments are extensive and touch on every existing endorsement. The most substantive amendments are:

- All subjects (K-8), increased the number of credit hours from 20 semester credit hours to 30 while eliminating the requirement that it be accompanied by a second endorsement allowing the instructional staff to teach a specific subject area through at least grade 9.
- American Government/Political Science, adds requirement that coursework includes methods of teaching social sciences.
- Anthropology (5-9 or 6-12), new endorsement in sociology content area.
- Bilingual Education (K-12), adds a requirement for candidate to score an advanced or higher on an oral proficiency assessment conducted by an objective second party.
- Blended Elementary Education/Elementary Special Education (4-6), prohibits use in a middle school setting. • Blind and Low Vision (Pre-K-12), creates a new endorsement. This endorsement is not required to teach students who are blind or have low vision. Replaces the Visual Impairment (Pre-K-12) endorsement.
- Early Literacy (K-3), creates a new endorsement. This endorsement is not required to teach early literacy. There is an existing endorsement that already covers this grade range, Literacy (K-12).
- Humanities (5-9 or 6-12), this endorsement currently requires candidates to earn 10 credits each in at least two difference content areas that fall under the Humanities. Individuals with this endorsement can teach any humanities course. The humanities include: literature, music, word language, humanities survey, history, visual art, philosophy, drama, comparative world religion, architecture, and dance. The proposed amendments would require individuals to take all 20 credits in one of the subject areas, duplicating the existing standalone endorsements and limiting them to teaching only that subject area.

- Social Studies, currently there are two social studies endorsements, social studies (5-9) and social studies (6-12). The endorsement for grades 5 through 9 requires 20 credit hours, five credits each in history, geography, American government/political science or economics. The endorsement for grades 6 through 12 requires a subject specific endorsement in history, American government/political science, economics, or geography and a minimum of twelve credit hours in a second identified subject area, resulting in a total of 32 credits. The new options result in a Social Studies (6-12) endorsement requiring between 32, 36 or 48 credit hours.
- Teacher Leader – Instructional Technology, adds a new endorsement that is not required to provide any type of instruction. Adds to the list of existing teacher leader endorsement of: instructional specialist, literacy, mathematics, and special education. In FY 2022 there were 934 instructional staff with the Teacher Leader - Special Education Endorsement, two with the Instructional Specialist, and 153 with the mathematics focus area. There are no instructional staff with the Teacher Leader – Literacy endorsement.
- Visual Impairment (Pre-K-12), removed. Pursuant to Section 33-1201B, Idaho Code, individuals who held a specific endorsement issued or recognized by the State Board of Education shall continue to hold the specific endorsement and be recognized as holding the specific endorsement even if, in the future, the State Board of Education ceases to issue or recognize such specific endorsements.

Once the first reading is approved, additional stakeholders will have the opportunity to give comment prior to the proposed policy amendment coming back to the Board as a second reading. Ms. Bent noted the Humanities endorsement changes are not recommended to move forward at this time.

BOARD ACTION
M/S (Clark / Roach) I move to approve the first reading of Board Policy IV.B., Instructional Staff Certificate Endorsements, as provided in Attachment 1, with the exception of the Humanities endorsement. A roll call vote was taken, and the motion carried 7-0. Board President Liebich was absent from voting.
There were no comments or questions from the Board.

5. Board Policy – By-laws and I.U. Presidents Leadership Council - Second Reading – Action Item

Ms. Bent said while there were no changes between first and second reading, at the Planning, Policy and Governmental Affairs (PPGA) committee meeting there was a request to tweak some of the language. Since it was too late in the process to make those changes the new language will be brought back to the Board at a future meeting.

BOARD ACTION

M/S (Clark / Siddoway) I move to approve the second reading of Board policy - Bylaws as submitted in Attachment 1 and Board policy I.U. Presidents Leadership Council as submitted in Attachment 2. A roll call vote was taken, and the motion carried 7-0. Board President Liebich was absent from voting.

There were no comments or questions from the Board.

At this time the Board took a 10-minute break returning at 10:10 a.m. (PT)

6. University of Idaho Extension – 4H Youth Development Program

Dr. Clark mentioned that the Board approved, at its regular June 2022 meeting, the University of Idaho 4- H program, subject to school district and public charter school policies and applicable subject area alignment with Idaho content standards. The University of Idaho would like to update the Board on progress they have made with the program so far.

Sunny Wallace, Director of Executive Projects, University of Idaho, shared the following with the Board.

- University of Idaho has been delivering 4-H youth development programs since 1912.
- Idaho 4-H professionals and volunteers serve over 75,000 youth age 5-18 through 4-H club and out of school programs.
- Idaho 4-H serves every community in Idaho, with 42 offices in 44 counties, in addition to 3 offices on tribal reservations.
- UI partners with local school districts, charter schools, and homeschool groups, in addition to larger statewide partners such as the Idaho Department of Education and Idaho Out of School Network, just to name a few.
- Our motto is “Learn by Doing”, where we empower 4-H youth to reach their full potential.
- Through *Learn Everywhere with 4-H*, UI is working with families and schools to identify 4-H projects, where youth will then have to complete and show have they have accomplished mastery. Each project includes working with caring adults, meeting 4-H project requirements for the youth’s appropriate skill level, completing a minimum of 6-hours of project work, in addition to completing a record book, presentation, and project interview. UI 4-H Youth Development faculty have developed mastery check lists which will be used to ensure mastery of 4-H projects.
- UI is targeting two 4-H project areas to refine the process and ensure program quality before opening Learn Everywhere to more youth and projects.
- The first two projects offered include Civics/Government studies projects, particularly the 4-H Know Your Government project, which includes study and culminates with a 3-day event where youth actively make “laws” and argue court cases. They are coached in this by state legislators and members of the court. The

youth have different responsibilities and levels of government where they learn and engage in each year of participation. Additionally, they complete a journal or 4-H Record Book to complete the project.

- 4-H Animal Science project – with or without an animal, eliminating barriers to participation. Includes animal husbandry, but also biology, nutrition, and financial literacy. 4-H Members undertake prescribed lessons, must exhibit their project, complete a speech or demonstration and complete their 4-H Record Book.
- UI received a gift of $50,000 from the Stand Together Trust to help staff and build a replicable program in Learn Everywhere with 4-H. UI 4-H Youth Development Faculty are targeting school districts where existing relationships are strong and also districts identified as progressive as pilots in the first year. Identified pioneer school districts located across the state include:
    1. Hansen SD
    2. Twin Falls County (includes homeschools and charters)
    3. Kootenai County
    4. Melba SD
    5. Owyhee County Schools
    6. Leadore SD
    7. Plummer – Lakeland Elementary at minimum
    8. Bingham County Schools
    9. Bonneville County Schools

There were no comments or questions from the Board.

7. Education Staff Shortage Update

Dr. Clark led the discussion by sharing the following with the other Board members. She shared the results of two surveys, one done by the Idaho Association of School Administrators (IASA) conducted requesting feedback on open positions during the month of May. Preliminary results of the survey received during the last week of May showed large fluctuations in open positions as individuals notified school districts at the same time districts were actively filling positions that they already knew would be vacant in the coming school year. The final survey results to the May survey indicated there were 702 open positions (332 in Elementary and 370 in Secondary). There were 452 retirements.

At PPGA's request, IASA ran a follow up survey to get a snapshot in time as we moved through the start of the school year. In the follow up survey 87 school districts responded, providing the following information. There were 134 certified staff openings (62 in Elementary and 72 in Secondary).

School districts also shared what were the hardest to fill positions. They were:

- Special Ed: 68%

- Math: 52%
- Science: 35%
- Elementary: 21%
- Electives: 16%
- English: 11%
- Social Studies: 5.8%
- Other: 29% (CTE, School Psychologist, Language Specialists)

In addition to the survey information, the regional superintendent representative has informed Board staff that they are having equal, if not more difficulty in filling classified staff positions. This category includes paraprofessional and classroom aides.

Dr. Clark said one of the most concerning aspects of this issue is a statement from the May survey that said "we are no longer looking for highly qualified teachers for our classrooms, circumstances have put us in a place where we are looking for a willing body and then we figure out a way to get him or her certified." All of the data shared should therefore give the Board concern about the quality of education. There will be a tremendous need for mentoring and support to help these people with little or no teacher training. And this is a national issue.

Superintendent Ybarra said the long-term concern will be the dips in academics not just from Covid-19 but from folks who do not know how to intervene with students who may have issues with reading or math.

Mr. Gilbert asked if there was a way, as we head into the early spring, to know what the number of teacher / staff turnover might be before summer. Having this data prior to going into Legislative session in January might be helpful. Dr. Clark said teachers are not compelled to give notice until their contract expires which would not be until the end of the school year.

Mr. Gilbert asked Mr. Freeman if it would be the appropriate time to bring this issue up to Legislators to make changes to statute to alleviate this problem. And a discussion concerning classified pay has to be addressed. Superintendent Ybarra echoed that sentiment; that pay raises for both teachers and classified staff needs to be addressed, saying that teachers talk about the huge amount of student debt they rake up getting their educations and with the low salaries being offered they leave the profession to make more money elsewhere.

Mrs. Roach said her understanding is that we are graduating 1200 teachers a year at Idaho universities. Some of the programs do offer teacher mentoring. Ms. Bent said all Idaho teacher prep programs are required to offer a level of entry level mentorship and that training has increased over the years as there are more requirements at the school district level. At the College of Southern Idaho, they offer a mastery-based program. Dr.

Clark said some districts have expressed concern because some teachers are not staying long enough to get mentoring.

There were no further comments or questions from the Board.

Board member Gilbert left the meeting at 10:38 a.m. (PT)

WORK SESSION

PLANNING, POLICY AND GOVERNMENTAL AFFAIRS

A. Education Performance Measure Review and Discussion

Ms. Bent led the work session. She shared that the annual performance review is a look back at the previous four years' performance and is based on performance measures last approved by the Board at the June 2021 Regular Board meeting for the institutions and agencies and February 2021 for the Board's K-20 Strategic Plan. The strategic plan performance measures approved by the Board in 2022 are scheduled to be reported to the Board at the October 2023 Regular Board meeting.

This year's performance reporting will be split between two meetings, rather than reviewing the performance measures across the system in one meeting. The October Work Session will focus on the K-12 statewide assessment data that was discussed at the June and August Board meetings and the postsecondary performance measures are scheduled to be discussed in December when the Board discusses the K-20 Education strategic plan. The institution and agency annual performance measures reports are included in the October Work Session agenda material to provide adequate time for review prior to the December regular Board meeting discussion as well as provide an opportunity for the Board to identify specific areas they would like to focus on in December. During the December meeting, Board members will have the opportunity to provide direction to Board staff on amendments the Board would like include for consideration when the Board updates to the K-20 Education Strategic Plan in February.

The October Work Session is also the time when the Board provides direction to staff and the agencies and institutions on any changes they would like to see in strategic plans, performance measures, and benchmarks/performance targets for the Board's consideration in 2022. The Board is scheduled to discuss amendments in December during the Work Session. Approval of any amendments to the K-20 Education System strategic plan are then considered at the February Regular Board meeting and the institutions and agencies plans at the April Regular Board meeting.

The focus of todays discussion can be found at Work Session, Tab A, Page 2, Attachment 2 of the Board agenda materials.

Mrs. Roach said she reads this as 80 percent of students who stay in their district from kindergarten to grade three are testing at 80 percent or better. She asked what were the

numbers the Board should be concerned with. Ms. Bent said the English Language Learners (at 62 percent) and the economically disadvantaged (at 70 percent) student numbers are still cause for concern.

Ms. Bent said when looking at assessment growth limited to new IRI tests beginning in 2019 for students at grade level the proficiency level jumps to 90 percent (Work Session, Tab A, page 3, Attachment 2).

Also included in the discussion was Work Session, Attachment 32, a report from SAS on Unfinished Teaching and Learning Results from the COVID-19 Pandemic. Some of the data from the report was as follows.

- In grades 5-8 and 10 ISAT English Language Arts (ELA), students tended to score close to the pre-pandemic expectation, with effect sizes ranging from -0.06 to 0.01, representing little to no impact.
- In grades 5–8 and 10 ISAT Math, there was an observable amount of unfinished teaching and learning represented by effect sizes of -0.17 to -0.07.
- Students who took IRI assessments in Fall 2020 fell short of expectations based on the pre-pandemic average schooling experience with effect sizes ranging from -0.18 to -0.14.
- Students in many schools and districts across Idaho met or exceeded the pre-pandemic expectations, suggesting there are many exemplars that could offer valuable lessons learned. About 50 percent of schools and districts met or exceeded the pre-pandemic expectation in ISAT ELA, about 25 percent of schools and districts met or exceeded in ISAT Math, and over 10 percent met or exceeded in IRI.
- Some student groups exhibited more unfinished teaching and learning than other students, illustrating widening achievement gaps relative to their peers: • Students who are economically disadvantaged • Students learning English • Students who were chronically absent
- Students in virtual schools experienced similar levels of unfinished teaching and learning compared to students not served in virtual schools, but students served in virtual schools tended to experience more unfinished teaching and learning for ISAT assessments and less unfinished teaching and learning for IRI assessments.
- Students in schools classified as “City” and “Rural” tended to experience slightly less unfinished teaching and learning than students in schools classified as “Suburban” and “Town.”

Along with the data SAS has given school districts access to a program called Education Visualization and Analytics Solution (EVAAS) where schools will be able to see individual student level progress all the way into the classroom to help the schools create individualized programs for students.

Dr. Hill asked if any of the data gathered showed that students who continued to get in class instruction did better than those who did remote learning during the COVID-19

pandemic. Ms. Bent said yes, that data is included in the report and yes, students who received in person instruction did fair better than those who were remote learners only.

Ms. Bent said all of these scatter graphs and data being presented today will be available for the general public to review. That web link is; https://osbe.sas.com/welcome.html Ms. Bent said what is presented today is only three years' worth of data and the 2022 data will be included in the next month on the website. Current school year data will then be added to the website up to 2024 as it is gathered.

Dr. Hill asked if the contract with SAS was at the State level. Ms. Bent said it was at the State level through the Office of the State Board of Education.

Mrs. Roach asked about the data being available to the public. Ms. Bent said the data is available through the Board's website and that school districts received training virtually on how to access the data earlier this week.

Ms. Bent said overall the data gathered shows that Idaho students did very well in several testing levels.

Ms. Bent also noted the annual transfer and articulation report is included in the agenda material. This report is required to be compiled from the postsecondary institutions annually. Currently, there are discrepancies in how the data being reported by the institutions that still need to be resolved. Some institutions are only providing a sampling of transfer activity and then applying to the student body while the statute requires all transferred credits be reported.

Before the discussion ended Ms. Bent asked the Board to prepare for the December Board meeting by preparing any questions around Work Session, Attachment 1, Tab A, Page 1, K-20 Education Strategic Plan Performance Measures FY 2022.

There were no further comments or questions from the Board.

INFORMATIONAL

SDE

1. Elementary Secondary School Accreditation Report, 2021-2022

There were no comments or questions from the Board.

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

BOARD ACTION

M/S (Clark / Hill) I move to adjourn the meeting at 11:10 a.m. (PT). A roll call vote was taken, and the motion carried 6-0. Board President Liebich and Mr. Gilbert were absent from voting.

SPECIAL BOARD MEETING
November 14, 2022
Len B. Jordan Building
OSBE Conference Rom
Suite 307
Boise, ID 83720

A special meeting of the Idaho State Board of Education was held via zoom teleconference November 14, 2022, with the call originating from the offices of the Idaho State Board of Education. Board President Kurt Liebich called the meeting to order at 4:00 p.m. (MT).

Present

Kurt Liebich, President
Dr. Linda Clark, Vice-President
Dr. David Hill, Secretary
Shawn Keough
William G. Gilbert, Jr.
Cally J. Roach
Cindy Siddoway
Superintendent Sherri Ybarra

Absent

None

Monday, November 14, 2022 – 4:00 p.m. (Mountain Time)

PLANNING, POLICY AND GOVERNMENTAL AFFAIRS

1. Pending Rule Docket 08-0111-2201 – Registration of Postsecondary Institutions and Proprietary Schools – Zero Based Regulations Rewrite - Action Item

Dr. Hill mentioned that on PPGA Attachment 1, Tab 1 Page 5 the document reads Washington Governors University instead of Western Governors University. The correction was duly noted and the change will be made prior to being published in the Bulletin.

BOARD ACTION
M/S (Clark / Hill) I move to approve pending rule – Docket 08-0111-2201, as submitted in Attachment 1. A roll call vote was taken, the motion carried 8-0.

There were no further comments or questions from the Board.

2. Pending Rule Docket 08-0113-2201 – Opportunity Scholarship – Zero Based Regulation Rewrite - Action Item

BOARD ACTION
M/S (Clark / Gilbert) I move to approve pending rule – Docket 08-0113-2201, as submitted in Attachment 1. A roll call vote was taken, the motion carried 8-0.

There were no comments or questions from the Board.

3. Pending Rule Docket 08-0202-2201 – Rules Governing Uniformity - Action Item

BOARD ACTION
M/S (Clark / Siddoway) I move to approve pending rule – Docket 08-0202-2201, as submitted in Attachment 1. A roll call vote was taken, the motion carried 8-0.

There were no comments or questions from the Board.

4. Pending Rule Docket 08-0203-2201 – Rules Governing Thoroughness - Action Item

Board President Liebich asked for clarification on the write-up. Dr. Clark said during the public comment process there were a significant number of responses from the public who asked that the computer science requirement not be moved forward. Hence the language pertaining to phasing in computer science high school graduation requirements being redlined out, at this time. The computer science graduation will not be included in the pending rule. The instruction in computation thinking requirement is being retained and will be included in the pending rule.

BOARD ACTION
M/S (Clark / Roach) I move to approve pending rule – Docket 08-0203-2201, as submitted in Attachment 1. A roll call vote was taken, the motion carried 8-0.

There were no further comments or questions from the Board.

5. Pending Rule Docket 08-0204-2201 – Rules Governing Public Charter Schools – Zero Based Regulations Rewrite – AND Pending Rule Docket 08-0301-2201 – Rules of the Public Charter School Commission Repeal – Zero Based Regulations Repeal - Action Item

BOARD ACTION
M/S (Clark / Hill) I move to approve pending rule – Docket 08-0204-2201, as submitted in Attachment 1 and pending rule – Docket 08-0301-2201 as submitted in Attachment 2. A roll call vote was taken, the motion carried 8-0.

There were no comments or questions from the Board.

6. Pending Rule Docket 47-0101-2200 – Division of Vocational Rehabilitation – Omnibus Rulemaking - Action Item

BOARD ACTION
M/S (Clark / Keough) I move to approve the pending rule Docket 47-0101-2200, as provided in Attachment 1. A roll call vote was taken, the motion carried 8-0.

There were no comments or questions from the Board.

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

BOARD ACTION
M/S (Clark / Keough) I move to adjourn the meeting at 4:13 p.m. (MT). A roll call vote was taken, the motion carried 8-0.

TAB	DESCRIPTION	ACTION
1	**BAHR - BOISE STATE UNIVERSITY – FOUR (4) ONLINE PROGRAM FEES**	Action Item
2	**BOISE STATE UNIVERSITY - ADA COUNTY HIGHWAY DISTRICT (ACHD) PERMANENT EASEMENT – JOYCE AVENUE**	Action Item
3	**BAHR – UNIVERSITY OF IDAHO - LEAVE POLICIES AND EMPLOYEE LEAVE BENEFITS FOR UNIVERSITY POSITIONS POLICY AMENDMENTS**	Action Item
4	**BAHR – UNIVERSITY OF IDAHO – LICENSE AGREEMENT FOR SPRING/T-MOBILE COMMUNICATION EQUIPMENT ON "I" TANK**	Action Item
5	**BAHR – UNIVERSITY OF IDAHO – SOUTH CAMPUS CHILLER PLANT REPLACEMENT AND IMPROVEMENTS**	Action Item
6	**BAHR – UNIVERSITY OF IDAHO – KIBBIE DOME BUILDING ELECTRICAL SERVICE REPLACEMENT**	Action Item
7	**FY 2022 FINANCIAL STATEMENT AUDITS**	Action Item
8	**IRSA – GENERAL EDUCATION MATRICULATION COMMITTEE APPOINTMENTS**	Action Item
9	**IRSA – GRADUATE MEDICAL EDUCATION COMMITTEE APPOINTMENTS**	Action Item

TAB	DESCRIPTION	ACTION
10	**IRSA – MATH COMMON COURSE INDEX UPDATE**	Action Item
11	**PPGA – STATE REHABILITATION COUNCIL APPOINTMENTS**	Action Item
12	**SDE – EMERGENCY PROVISIONAL CERTIFICATES**	Action Item
13	**SDE – PROFESSIONAL STANDARDS COMMISSION – PRAXIS ASSESSMENTS AND QUALIFYING SCORES**	Action Item

BOARD ACTION

I move to approve the consent agenda.

BOISE STATE UNIVERSITY

SUBJECT

Four (4) Online Program Fees

APPLICABLE STATUTE, RULE, OR POLICY

Idaho State Board of Education Governing Policies & Procedures, Section III.G. and Section V.R.

BACKGROUND/DISCUSSION

Boise State University proposes to offer four (4) new online undergraduate certificates, utilizing an online program fee consistent with Board Policy V.R, Establishment of Fees. These certificates will operate under the guidelines of Board Policy V.R. as it pertains to wholly online programs. Descriptions of the certificates are included below.

Applied Computing, Systems, and Network is a recently created fully online certificate for the Cyber Operations and Resilience major. The major requires overview of various topics that are not being covered in existing courses. Cyber Operations deals with resilience of systems. To learn the foundations of resiliency, graduates need to understand the basics of secure design, computational thinking, system, and network. The certificate is a standalone certificate available to all majors, however, the certificate especially targets students majoring in Cyber Operations and Resilience.

The certificate will be offered by the College of Engineering within the Program of Cyber Operations and Resilience. The courses taught as part of the certificate are foundational for what upper-level Cyber Operations is built upon.

Computed Tomography, Diagnostic Medical Sonography, and Magnetic Resonance Imaging are existing certificates adding an online program fee. The proposed programs will permit the current program at Boise State to grow. Student acceptance is currently limited by the number of available clinical sites within the Treasure Valley. Despite having multiple healthcare facilities, each site can only support the experiential needs of one student at a time. Having the ability to open the programs to students outside of the Treasure Valley will help Boise State better meet student, patient and healthcare facility needs across Idaho and the nation.

These programs will provide students the opportunity to remain in their local area for clinical experience placement and also attend a nationally recognized institution to meet their educational goals.

Graduates of the Computed Tomography and Magnetic Resonance Imaging programs will be able to sit for the national American Registry for Radiologic

Technologists (AART) credentialing exam. The credential will then satisfy employment eligibility requirements.

Graduates of Diagnostic Medical Sonography program will be able to sit for the national American Registry for Diagnostic Medical Sonography (ARDMS) credentialing exam. The credential will then satisfy employment eligibility requirements.

IMPACT

Applied Computing, Systems, and Network: No additional resources are required for the certificate. The Cyber Operations and Resilience program has the financial resources to fund the certificate. Adjunct or existing faculty will be identified to teach the courses. The projected enrollment is 20 students.

The student fee will be in accordance with the Online Program Fee as defined in the Board Policy V.R., 3.a.x. The price-point of $350 per credit and $4,200 (for 12 credits) for the proposed online certificate aligns with the majority of Boise State University's undergraduate online programs and current department online degree completion program fees.

Computed Tomography, Diagnostic Medical Sonography, and Magnetic Resonance Imaging: The programs' overall size will be scaled to demand, with new instructional costs at the 31-student threshold. Certificates are currently available online, and no new instructional costs are expected to be incurred until FY 2025.

Approval of the student fees for the certificates will allow Boise State to charge an online program fee in lieu of resident or non-resident tuition in accordance with Board Policy V.R., 3.a.x. The proposed online certificates would cost $395 per credit, which aligns with other Boise State University undergraduate online programs. For students who need 18 credits to earn the Computed Tomography certificate, the cost of the program would be $7,110. For students who need 36 credits to earn the Diagnostic Medical Sonography certificate, the cost of the program would be $14,220. For students who need 26 credits to earn the Magnetic Resonance Imaging certificate, the cost of the program would be $10,270.

ATTACHMENTS

Attachment 1 – Notification Letter – Applied Computing, Systems and Network Undergraduate Certificate

STAFF COMMENTS AND RECOMMENDATIONS

Board Policy III.G does not require approval of a new undergraduate or graduate certificate consisting of fewer than 30 credit requirements. The requests before the Board are to approve online program fees for each certificate.

Boise State's request to assess an online program fee of $350 per credit for the new program and $395 each of the existing undergraduate certificates listed above aligns with criteria as defined in Board Policy V.R.

Staff recommends approval.

BOARD ACTION

I move to approve the request by Boise State University to charge an online program fee of $350 per credit for an undergraduate certificate in Applied Computing and $395 per credit for undergraduate certificates in Systems and Network, Computed Tomography, Diagnostic Medical Sonography, and Magnetic Resonance Imaging.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

BOISE STATE UNIVERSITY
OFFICE OF THE PROVOST

November 7, 2022

TJ Bliss
Chief Academic Officer
Office of the Idaho State Board of Education
Boise, ID

Dear TJ,

The purpose of this this Notification Letter is to notify you (as per Board Policy Section III.G.3.c.) of our intent to create an *Applied Computing, Systems, and Network Certificate* in the College of Engineering.

The new undergraduate certificate will go into effect in Fall 2023.

The certificate in Applied Computing, Systems, and Network is a standalone certificate available to all majors, however, the certificate especially targets students majoring in Cyber Operations and Resilience. Cyber Operations deals with resilience of systems. To learn the foundations of resiliency, graduates need to understand the basics of secure design, computational thinking, system, and network. The courses taught as part of the certificate are foundational for what upper-level Cyber Operations is built upon.

The 12-credit fully online certificate requires no additional resources. The Cyber Operations and Resilience program has the financial resources to fund the certificate. The projected enrollment is 20 students.

Please do not hesitate to contact me should you need additional information.

Sincerely,

Zeynep Hansen, PhD
Vice Provost for Academic Planning
Office of the Provost

Cc: Patty Sanchez
John Buckwalter
Mark Damm
JoAnn Lighty

1910 University Drive Boise ID, 83725-1001
Phone (208) 426-1202 provost@boisestate.edu boisestate.edu/academics
This letter is an electronic communication from Boise State University

Applied Computing, Systems, and Network Certificate	
Course Number and Title	Credits
Take the following	
CORE 100 - Secure Design and Computational Thinking	3
CORE 101 – Blue Team U	3
CORE 200 – Operating Systems and Cloud Operations	3
CORE 201 – Cyber Operations Networking	3
Total Credits	12

BOISE STATE UNIVERSITY

SUBJECT

ACHD Permanent Easement - Joyce Avenue

APPLICABLE STATUTE, RULE, OR POLICY

Idaho State Board of Education Governing Policies & Procedures, Section V.I.5.(b)(ii) and Section 33-107 (2), Idaho Code

BACKGROUND/DISCUSSION

A multi-family housing developer is constructing a 500+ bed student-housing facility on the corner of Protest Hill and Boise Avenue. The site is immediately adjacent (south) to Boise State University's (BSU's) campus and creates a number of concerns for pedestrian safety. During the entitlement process, Boise State requested that the developer provide pedestrian improvements along Boise Avenue, specifically on the western end of the building (the furthest point from the existing signalized crossing). The developer agreed to install a Rectangular Rapid-Flashing Beacon (RRFB) crossing at Boise Avenue and Joyce Street. This improvement provides a safe means of crossing for pedestrians; however, it requires a permanent easement to the Ada County Highway District (ACHD), on Boise State's property, for the installation of the required infrastructure.

IMPACT

The permanent easement will allow ACHD to make pedestrian safety improvements. Where this type of improvement does not exist, jaywalking is prevalent and the risk of injury is high. The RRFB crossing at Boise Avenue and Joyce Street is strategically located and will allow students to safely walk and/or bike to campus.

ATTACHMENTS

Attachment 1 - Permanent Easement Agreement with Exhibits A and B (Legal Description)

Attachment 2 - Map of crosswalk location

BOARD STAFF COMMENTS AND RECOMMENDATIONS

This request complies with Board Policy V.I., which states that easements to make a permanent use of real property under the control of an institution, school, or agency require prior Board approval unless the easements are to public entities for utilities.

Staff recommends approval.

BOARD ACTION

I move to approve the request by Boise State University to enter into a permanent easement agreement with the Ada County Highway District for the Boise Avenue area property identified by the attachments.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

Verve
COM21-0240
T 3N R 2E Sec 15

(Reserved for Ada County Recorder)

PERMANENT EASEMENT

THIS PERMANENT EASEMENT (the "Easement"), is made and entered into this ____ day of _____, 2022, by and between the State of Idaho by and through the State Board of Education, by and through Boise State University, hereinafter referred to as "GRANTOR," and ADA COUNTY HIGHWAY DISTRICT, a body politic and corporate of the State of Idaho, hereinafter referred to as "ACHD."

WITNESSETH:

FOR GOOD AND SUFFICIENT CONSIDERATION, IT IS AGREED:

SECTION 1. Recitals.

1.1 GRANTOR owns the real property located in Ada County, Idaho more particularly described on Exhibit “A” attached hereto and by this reference incorporated herein (hereinafter “Servient Estate”).

1.2 ACHD has jurisdiction over the public highways, including sidewalks, and public rights-of-way which adjoin and are adjacent to the Servient Estate (hereinafter the “Dominant Estate”).

1.3 ACHD desires to obtain an easement on, over and across the Servient Estate for the purposes hereinafter described, and, for the consideration and on the terms and conditions hereinafter set forth, GRANTOR is willing to grant such easement to ACHD.

SECTION 2. Grant of Easement and Authorized Uses.

GRANTOR hereby grants to ACHD a permanent exclusive easement over and across the Servient Estate for use by the public, including motorists, pedestrians and bicyclists, and the following uses and purposes:

(a) placement of a Public Rights-of-Way as (as defined in Idaho Code, section 40-117);

(b) construction, reconstruction, operation, maintenance and placement of a Highway (as defined in Idaho Code, section 40-109) and any other facilities or structures incidental to the preservation or improvement of the Highway;

(c) statutory rights of ACHD, utilities and irrigation districts to use the Highway and/or Public Right-of-Way.

SECTION 3. Permanent Easement; Covenants Run with the Land.

This is a permanent easement. This Easement, and the covenants shall be a burden upon the Servient Estate and shall run with the land. The Easement and the covenants and agreements made herein shall inure to the benefit of and be binding upon, ACHD and GRANTOR, and Grantor's successors and assigns to the Servient Estate.

SECTION 4. Appurtenant.

The Easement herein granted is appurtenant to the Dominant Estate and a burden on the Servient Estate.

SECTION 5. Maintenance.

Upon acceptance of the Highway, ACHD shall maintain the physical integrity of this easement in good condition and repair and as required to satisfy all requirements of applicable laws, the policies of ACHD and sound engineering practices. The repair and maintenance of the physical integrity of the Easement shall be at the sole cost and expense of ACHD; provided if the damage to the physical integrity of the Easement is as a result of the activities of GRANTOR, GRANTOR'S guests, invitees, contractors or agents, the repair shall be at the sole cost and expense of GRANTOR. This Section shall not release GRANTOR'S obligation to provide routine maintenance required under any applicable state or local law, ordinance or regulation as to the pedestrian facilities that may be placed on the Servient Estate.

SECTION 6. Indemnification.

ACHD shall, subject to the limitations hereinafter set forth, indemnify, save harmless and defend regardless of outcome GRANTOR from expenses of and against suits, actions, claims or losses of every kind, nature and description, including costs, expenses and attorney fees caused by or arising out of any negligent acts by the ACHD or the ACHD's officers, agents and employees while acting within the course and scope of their employment, which arise from or which are in any way out of ACHD's construction, use and maintenance on the Servient Estate. Any such indemnification hereunder by the ACHD is subject to the limitations of the Idaho Tort Claims Act (currently codified at chapter 9, title 6, Idaho Code). Such indemnification hereunder by the ACHD shall in no event cause the liability of the ACHD for any such negligent act to exceed the amount of loss, damages, or expenses of attorney fees attributable to such negligent act, and shall not apply to loss, damages, expenses, or attorney fees attributable to the negligence of GRANTOR.

SECTION 7. Recordation.

This Easement shall be recorded in the Official Real Property Records of Ada County, Idaho.

TO HAVE AND TO HOLD this Easement unto the ACHD forever.

GRANTOR covenants to ACHD that ACHD shall enjoy the quiet and peaceful possession of the Servient Estate; and, GRANTOR warrants to ACHD that GRANTOR is lawfully seized and possessed of the Servient Estate and has the right and authority to grant this Easement to ACHD.

IN WITNESS WHEREOF, the undersigned have caused this Easement to be executed the day, month and year first set forth above.

GRANTOR

_____

By:
Its:

Notary acknowledgment on following page

STATE OF IDAHO)
) ss.
County of Ada)

This record was acknowledged before me on _____, _____
[date]

by_____
[name(s) of individual(s)]

as _____
[type of authority, such as officer or trustee]

of_____.
[name of party on behalf of whom record was executed]

_____

Signature of notary public

My commission expires: _____

EXHIBIT LIST

Exhibit “A”. Legal description of Servient Estate.

THE LAND GROUP

July 19, 2022
Project No.: 119064

EXHIBIT "A"

BOISE AVENUE
PERMANENT EASEMENT DESCRIPTION

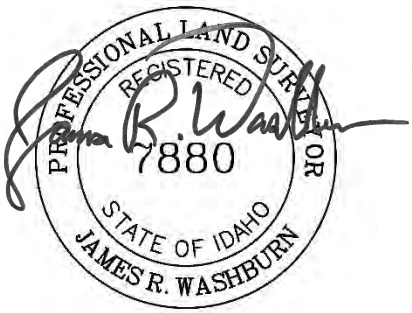
An easement located in Lot 31, Block 1 of Howard's Fourth Subdivision, recorded in Book 19 of Plats at Page 1216 of Ada County Records, being in the Southeast 1/4 of the Northwest 1/4 of Section 15, Township 3 North, Range 2 East, Boise Meridian, City of Boise, Ada County, Idaho, more particularly described as follows:

Commencing at the point of curve on the northerly right of way line of West Boise Avenue at the Southwest corner of said Lot 31, Block 1 of Howard's Fourth Subdivision, (from which point the Southeast corner of said Lot 31, Block 1 bears South 34°51'05" East, 111.11 feet distant);
Thence from said point of curve on the northerly right of way line of West Boise Avenue, South 34°51'05" East, a distance of 8.82 feet along the northerly right of way line of West Boise Avenue, to the POINT OF BEGINNING;

Thence South 79°51'05" East, a distance of 7.07 feet;
Thence South 34°51'05" East, a distance of 14.00 feet;
Thence South 10° 08' 55" West, a distance of 7.07 feet to said northerly right of way line;
Thence North 34° 51' 05" West, a distance of 24.00 feet on the northerly right of way line of West Boise Avenue to the POINT OF BEGINNING.

The above-described easement contains 95 square feet more or less.

PREPARED BY:
The Land Group, Inc.

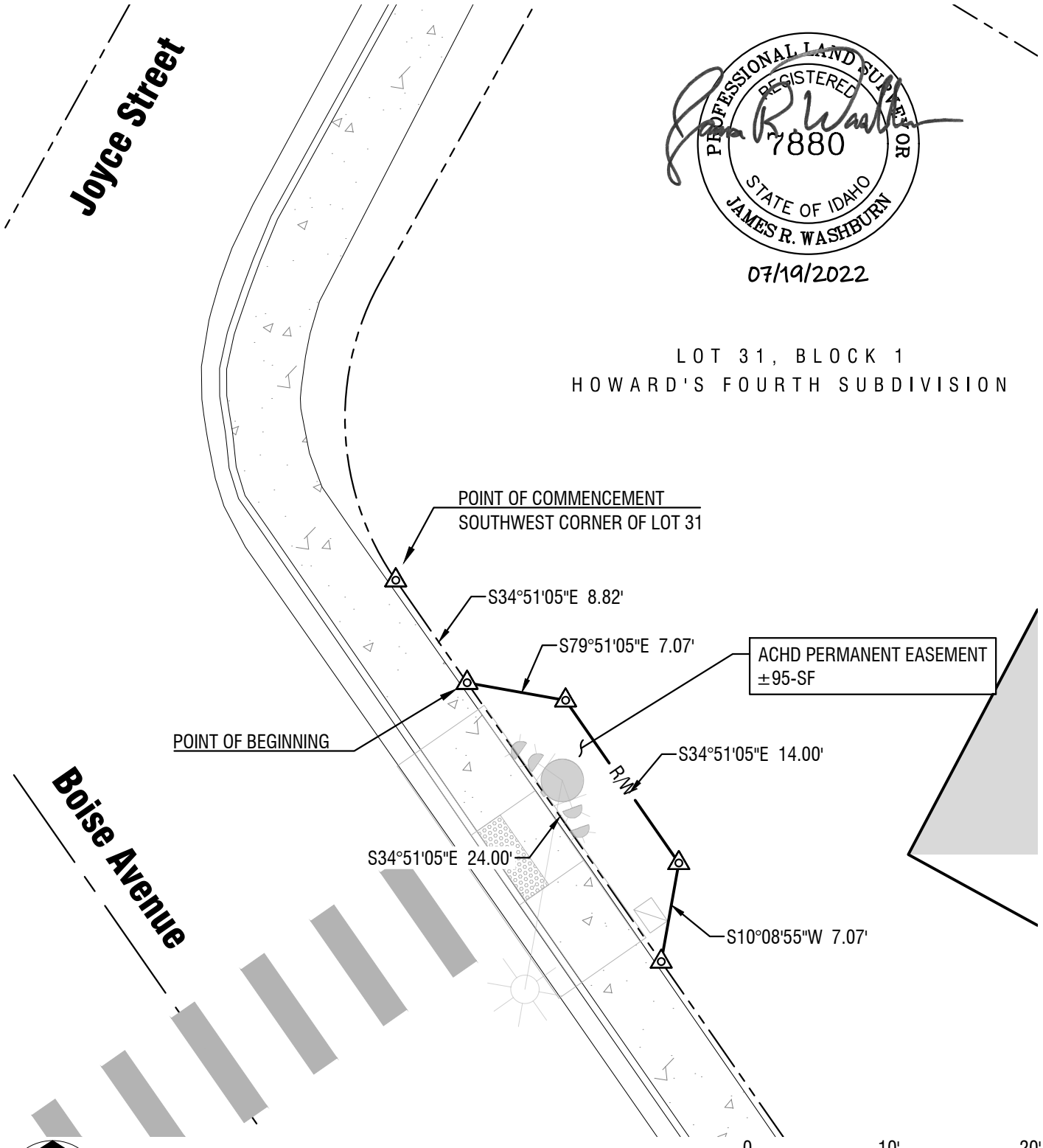


James R. Washburn

07/19/2022

Exhibit “B”. Right of Way Easement Description of Servient Estate.

The Ada County Highway District (ACHD) is committed to compliance with Title VI of the Civil Rights Act of 1964 and related regulations and directives. ACHD assures that no person shall on the grounds of race, color, national origin, gender, disability or age, be excluded from participation in, be denied the benefits of, or be otherwise subjected to discrimination under any ACHD service, program or activity.



ACHD Permanent Easement

Horizontal Scale: 1" = 10'

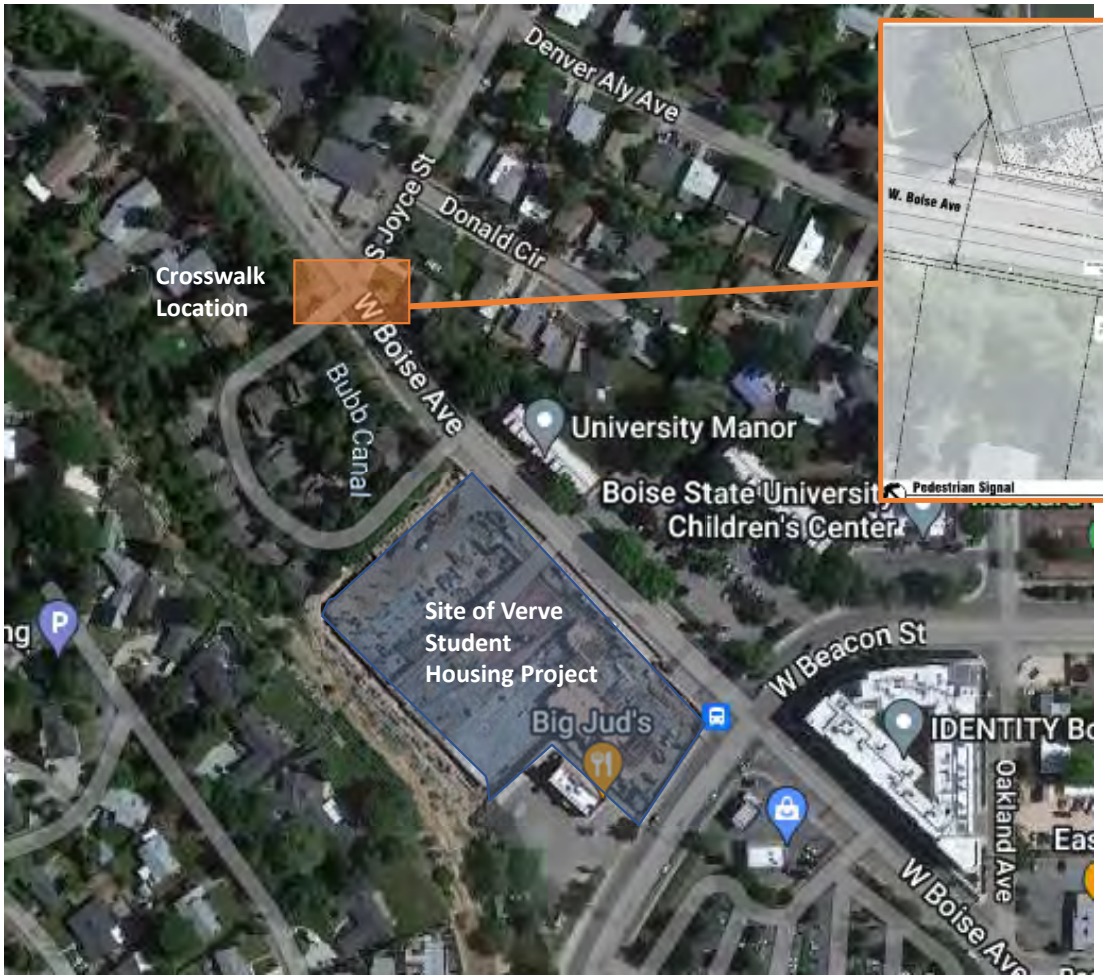
Project No.: 119064
Date of Issuance: 07-19-2022

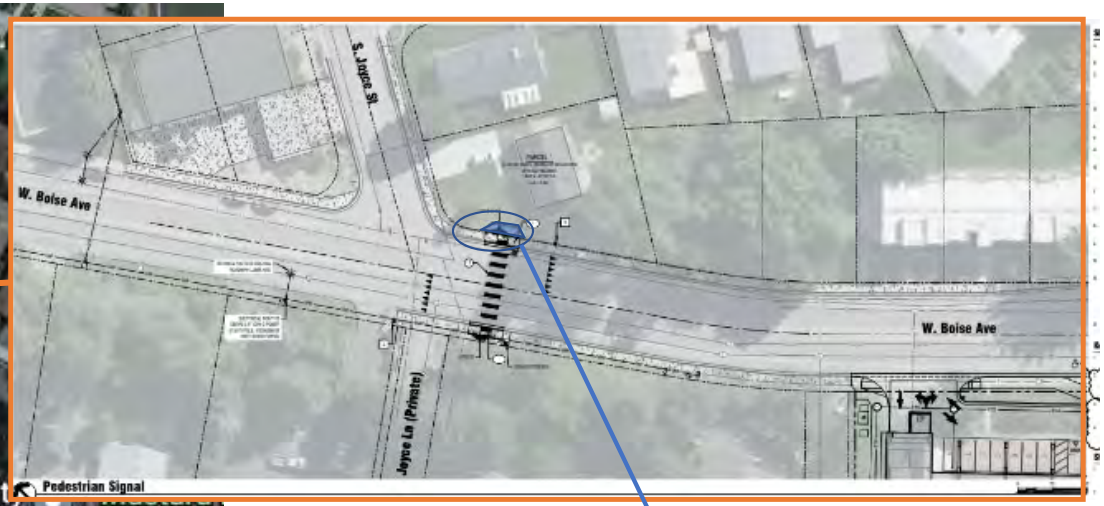
THE LAND GROUP

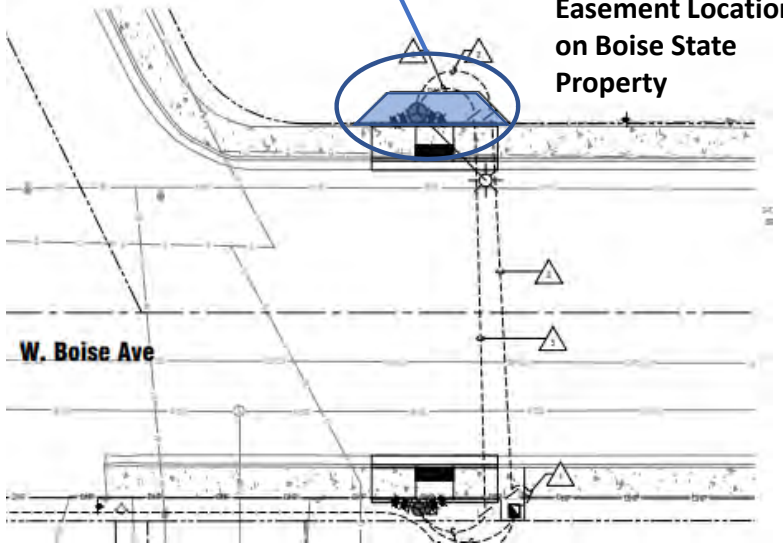
ACHD Permanent Easement
Boise Ave & Joyce St. Pedestrian Signal

Exh B

File Location: g:\2019\119064\cad\survey\exhibits\ex 220719 achd perm esmt at bsu property 119064.dwg
Last Plotted By: jason dansmer
Date Plotted: Tuesday, July 19 2022 at 07:39 AM







Easement Location on Boise State Property

UNIVERSITY OF IDAHO

SUBJECT
Employee Leave Benefits, FSH3710 and APM55.09

REFERENCE
Various	An original part of the university's 1979 Handbook, this section underwent revisions in 2002, 2008, 2010, 2011, 2015, 2016, 2017 and 2020.

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

BACKGROUND/DISCUSSION
A volunteer group of University of Idaho (UI) faculty and staff began meeting in 2019 to discuss and advocate for an updated paid parental leave policy. Changes to FSH3710 reflect the outcome of their efforts. The Federal Family and Medical Leave Act (FMLA) grants eligible employees up to 12 weeks of unpaid job/benefits-protected leave. The updated UI parental leave policy goes beyond the FMLA minimum and guarantees eligible employees 432 hours of the 12 weeks be paid leave.

The university has been systematically reviewing policies and making appropriate updates to align with current operating and governing procedures. Changes to this policy include:

- addition of paid parenting leave for eligible employees who meet the specific eligibility criteria under Family Medical Leave
- removal of the unpaid non-FML parenting leave option and extended medical leave
- minor updates to align university policy with FMLA
- clarification language regarding holiday pay and emergency closure

IMPACT
The Paid Parental Leave Policy Working Group feels paid parental leave will significantly add to employees' work/life balance and general morale.

ATTACHMENTS
Attachment 1 – 2023 FSH3710 Clean (Faculty Staff Handbook 3710 Leave Policies for All Employees)
Attachment 2 – 2023 FSH3710 Redline (Faculty Staff Handbook 3710 Leave Policies for All Employees)
Attachment 3 – 2022 APM55.09 Redline (Administrative Procedures Manual APM55.09 Employee Leave Benefits)
Attachment 4 – 2022 APM55.09 Clean (Administrative Procedures Manual APM55.09 Employee Leave Benefits)

STAFF COMMENTS AND RECOMMENDATIONS

This action allows the University of Idaho staff to move forward in updating the Faculty-Staff Handbook. Board Policy II.F. governs non-classified employees. Board Policy II.E governs classified employees.

Staff recommends approval.

BOARD ACTION

I move to approve the request by the University of Idaho to execute the revisions to Administrative Procedures Manual APM55.09 Employee Leave Benefits as noted in the documents attached to this agenda item.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

3710

LEAVE POLICIES FOR ALL EMPLOYEES

LAST REVISION:
x
CONTENTS:

A. General

B. Annual Leave

C. Sick Leave

D. Holidays

E. Parenting Leave

F. Military Leave

G. Leave for Court Required Service and Voting

H. Leave for Campaigning for or Service in Public Office

I. Administrative Leave

J. Academic Transitional Leave

K. Shared Leave

L. Family Medical Leave

M. Service member Family and Medical Leave

N. Personal Leave

O. Leave for Professional Improvement

P. Exceptions

A. GENERAL.

A-1. The University of Idaho (hereinafter referred to as university) strives to offer leave programs that are both comprehensive and flexible to meet employee needs. Leave with or without pay is

extended to employees under a variety of circumstances described below. Exceptions may be granted in special circumstances [see R below; APM 55.09, 55.07, 55.38; FSH 3120, 3720 and 6230]

A-2. The term "leave" refers to an employee's absence from duty. Each leave type as contained in this policy discusses circumstances in which such an absence may be continued with pay when leave accruals are available or when leave is approved without pay. Certain types of leave may require or provide options to take one leave concurrent with another. For example, sick and annual leave may be taken or may be required to be taken concurrently with other types of leave. All leaves are subject to approval.

A-3. Unless otherwise noted, for purposes of this policy, "immediate family member" includes: your spouse, your child, parent, brother, sister, grandparent, and these same relationships of a spouse, by marriage, adoption, or foster arrangement. An immediate family member may also include an individual who has assumed a similar relationship to those above, other than the relationship of spouse*, and for whom the employee or the individual has had financial responsibility for the other. An immediate family member also may include any individual who is a qualified dependent under IRS regulations. The university reserves the right to request documentation establishing financial responsibility or qualifying status as an IRS dependent. Federal FMLA criteria will be used in determining "immediate family member".

*Due to the 2006 "marriage amendment" to the Idaho Constitution the university, despite the wishes of the Faculty Senate, is unable to include domestic partnerships.

A-4. Separation from employment or the term terminating employee refers to an employee's separation from all employment.

A-5. A break in State of Idaho service is defined as job termination that is separated by at least three business days prior to re-employment with the university or any other State of Idaho employer.

A-6. Full and part-time employees are eligible for some or all leaves discussed in this policy.

a. Benefit-eligible employees are those who hold a board-appointed position [FSH 3080] and are employed at least half time or greater.

b. Individuals who are employed at least half time or greater as temporary help (TH) and who are expected to complete five months or more of continuous university service and are eligible to participate in the Public Employers Retirement Plan for Idaho (PERSI) are eligible for limited benefits, including annual leave, sick leave and pay for holidays on which they do not work [FSH 3090].

A-7. Leave may not be taken in advance of accrual and may not be taken in excess of 80 hours in a pay period.

A-8. Leave may not be taken on an employee's first day of employment. If an employee is unable to report for work on their specified first day of employment; employment will not begin until the first day that the employee reports for active duty.

A-9. All employees, including faculty and exempt employees, are responsible for recording all leave taken on bi-weekly time reports and complying with the terms of leave policies, including, but not limited to:

a. completing application for leave with supervisor or Human Resources as appropriate and providing any medical evidence to HR and other requested information;

b. abiding by any and all return-to-work restrictions; and

c. returning to work following expiration of approved leave.

Failure to uphold these responsibilities may result in absence without approved leave. Eligibility to preserve employment may be affected and/or the employee may be subject to disciplinary action, up to and including termination from employment as provided in appropriate university policies [FSH 3910, 3920 and 3930].

A-10. Exempt employees (full-time 40 hours per week expectation per FLSA) who work at least four hours in a day will be paid regular pay for the full day. If they work fewer than four hours, the difference will be charged to the appropriate accrued leave. If the employee is on approved Family and Medical Leave (FML) they must report each hour missed.

Employees who are not exempt from earning overtime accrual or payments shall record all approved absences in 1/4-hour increments, except when time loss has been made up through an approved flexible schedule.

A-11. Absent written agreement to the contrary, an eligible employee typically earns credit toward retirement plan vesting (see your PERSI, IORP or federal retirement plan document for details) and earns annual and sick leave accruals during the portion of any leave that is paid, except that sick and annual leave do not accrue in some circumstances during administrative leave. See I-7. An employee typically will not be given such credit for any periods of unpaid leave.

A-12. No break in service will occur during any approved paid or unpaid leave for the purposes of determining eligibility for retiree health benefits.

A-13. Attendance at work is a job requirement for all positions at the university. Excessive absenteeism can affect job performance and the employee may be subject to disciplinary action.

A-14. Departmental administrators are responsible for approving and ensuring the reporting of leave, via Banner, taken by the employees in their respective units. For procedures regarding reporting and monitoring leave see APM 55.09. The Banner system and Human Resources records are the official university leave records.

A-15. Human Resources is responsible for coordinating requests and reviewing compliance with all types of leave other than sick, annual and medical appointment leave discussed in this section. [APM 55.09]

B. ANNUAL LEAVE. (Available to UI employees listed in A-6 (a) and A-6 (b) as described in Section B)

B-1. Employees receive annual leave based on their classification of employment. [FSH 3080]

a. Classified Employees on full-time fiscal-year appointments accrue annual leave based on hours worked at the rate of approximately 3.7 hours bi-weekly for the first five full years of service, with a maximum accumulation of 192 hours; 4.6 hours bi-weekly up to 10 years of service, with a maximum accumulation of 240 hours; 5.5 hours bi-weekly up to 15 years of service with a maximum accumulation of 288 hours; and 6.5 hours bi-weekly for more than 15 years of service with a maximum accumulation of 336 hours. [RGP II.E.3; FSH 3080; APM 55.09]

b. Faculty on full-time fiscal-year appointments and exempt employees, including postdoctoral fellows, accrue annual leave at the rate of 7.4 hours bi-weekly and may accumulate a maximum of 240 hours. [RGPP II.F.3, FSH 3080, APM 55.09]

c. Faculty who hold academic-year appointments do not accrue annual leave. Their periods of obligation and leave are governed primarily by the academic calendar, subject to stipulation by the employee's dean. [FSH 3120]

B-2. Annual leave for classified and exempt appointment of less than 100% full-time, but equal to or greater than half-time, is accrued based on hours worked and at a rate based on the employee's classification [B-1]. No annual leave is accrued for less than half-time service.

B-3. Temporary employees who are eligible for PERSI accrue annual leave beginning on the first day of employment in an eligible position at a rate of .04625 times hours worked within each bi-week.

B-4. Annual leave accrual is temporarily suspended when the accumulation reaches the maximum allowance. Once the leave accumulation drops below the allowed maximum, accruals resume.

B-5. Employees eligible for overtime earn overtime based on only hours worked. There is no overtime accrual based on annual leave, sick leave, compensatory time, holidays or any other paid time off.

B-6. Annual leave continues to accrue while on any paid leave, except that annual leave does not accrue on hours of compensatory time used; during academic transitional leave [J] or for temporary employees who accrue annual leave based only on hours worked.

B-7. At the employee's option, accrued annual leave may be used during any approved leave that could otherwise be taken as sick leave.

B-8. Annual leave must be scheduled in advance and requested in writing by the employee. Annual leave may not be taken without the supervisor's written approval. Both the employee's vacation preference and business needs of the unit must be considered in establishing mutually agreed periods of leave [APM 55.09].

a. Supervisors are responsible for coordinating and approving requests for annual leave of all employees in their respective units.

b. An employee on approved annual leave, who becomes eligible to use sick leave through unforeseen events, may use sick leave in lieu of annual leave. Documentation to support the use of sick leave may be required.

B-9. Annual leave balances are paid to employees upon separation (i.e. resignation, retirement layoff, non-renewal, termination) from all State of Idaho employment [I.C. 67-5334]. Leave balances are transferred from the university to other State of Idaho employers when the university employment ends and a new position is accepted with any State of Idaho employer when there is no break in state service [A-5]. However, the university reserves the right to require an employee to exhaust some or all annual leave prior to any job or employment separation.

Employees funded on grants or contracts are expected to use all earned annual leave during the appointment before expiration of the grant(s) or contract(s). Employees separating employment upon the expiration or termination of a grant or contract, will be required to use annual leave before their last day of employment.

In the event of an employee's death, payment is made to the employee's estate.

The effective date of the employee's separation is the last day on which the employee reports to work for the university, unless Human Resources has approved a written request for alternative termination arrangements that are in the best interests of the university.

In the event that an academic administrator transitions from a position eligible for annual leave to a faculty position in which annual leave does not accrue, balances should be exhausted prior to the start of the new appointment. Leave balances that cannot be used will be carried forward. If not used, the balance of unused annual leave will be paid at the time of separation of all State of Idaho service. Carry forward of annual leave balances exceeding 80 hours must be approved in advance by Human Resources.

B-10. Any individual, regardless of type of appointment, with an annual leave balance who transfers or who is reassigned to another unit within the university may be required to exhaust all existing annual leave prior to starting the new assignment.

B-11. Payment in lieu of annual leave taken for any reason other than separation from employment is granted only by exception or under other special circumstances within the business needs of the university.

B-12. Eligibility requirements for annual leave for temporary help (TH) can be found in FSH 3090.

C. SICK LEAVE. (Available to UI employees listed in A-6 (a) and A-6 (b) as described in Section C)

C-1. Employees that work at least 40 hours in a bi-weekly pay period for at least five consecutive months accrue sick leave. Accrual is approximately 3.7 hours bi-weekly for full-time service. [FSH 3090 C]

C-2. Sick leave accumulation for half-time but less than full-time service is accrued proportionately based on hours worked and earned at the rate of .04625 for each hour worked.

C-3. Sick-leave may be accumulated without limit.

C-4. Sick leave cannot be taken in advance of accrual. If, at the end of a bi-weekly pay cycle, absences exceed sick leave accumulation, the hours will be charged to compensatory time first, if available, and then to annual leave. If there is no leave accumulation, time will be unpaid.

C-5. Sick leave continues to accrue while on any paid leave, except for hours of compensatory time used and during academic transitional leave [J].

C-6. Sick leave may not be used in lieu of annual leave, except when the conditions of B-8. b. above have been met.

C-7. Sick leave may be taken only as follows:

a. Illness or Serious Medical Condition of Employee. An employee's own illness, injury, or childbirth that prevents the employee from performing their assigned duties; or in the event of exposure to contagious disease if, in the opinion of responsible authority, the health of others would be jeopardized in the work place.

b. Illness or Serious Medical Condition of an Immediate Family Member. When the illness, injury, or childbirth of an immediate family member as defined in A-3 of this policy requires the attendance of another, the employee may use their own available sick leave.

c. Death of an Immediate Family Member. In the event of a death of an immediate family member as defined in A-3 of this policy; up to 15 days of sick leave may be used immediately following the event, but can be extended if there are special circumstances. The unit administrator and Human Resources may approve an extension of leave for up to a total of 30 days of sick leave.

d. Death of a Family Member. Sick leave usage for the death of a family member other than a member of the immediate family as defined in A-3 of this policy is limited to a maximum of five days of sick leave immediately following the event.

e. Medical Appointments. Personal or family appointments for medical, dental, optical treatment or examination, or meeting with an Employee Assistance Program professional, including time for travel to and from such appointments. An employee is allowed up to two hours of time off per month for such appointments without charge to sick leave provided prior notification was provided to the employee's supervisor regarding the needed time away (medical information need not be shared only the need for leave). If the employee has absences totaling more than two hours in a month, such absences must be reported and charged to sick leave. There is no carryover balance from month-to-month.

f. Parenting/Adoption/fostering. All eligible employees are entitled to use sick leave for parenting, adoption, and fostering as provided in E. Parenting Leave.

g. Organ Donation. Full-time employees may use up to five workdays of prior approved organ donation leave to serve as a bone marrow donor and may use up to 30 workdays of prior approved organ donation leave to serve as a human organ donor. Documentation must be provided to Human Resources in advance of the use of Bone Marrow or Organ Donation leave. Bone Marrow or Organ Donation leave does not reduce the employee's leave balances and is with continued pay and benefits up to the limits noted. Additional leave may be requested through an approved family medical [L] or personal [N] leave.

C-8. Documentation may be required to be submitted to Human Resources to support absences. Absences that occur during an approved family medical leave [L] are exempt from these requirements.

C-9. The federal Family Medical Leave Act of 1993 (FMLA) was adopted as law to protect the best interest and job security of employees. The university may initiate family medical leave (FML) and will apply FML concurrently with sick leave when the employee's own illness, work-related injuries, or an illness of a family member is covered by FML.

C-10. An employee may be eligible for FML after three (3) consecutive days of sick leave, unpaid or other absence [L-4] and may initiate a request for FML at any time prior to an absence which they suspect may qualify. However, the university may also initiate FML and will typically take steps to determine if an absence qualifies as FML when an employee has missed five consecutive workdays or longer by providing the employee with a medical certification form and FML application. A failure to comply with a request to complete and return the medical certification form and the FML application may result in absence without pay and/or disciplinary action, up to and including dismissal from employment (see FSH 3910, 3920 and 3930).

C-11. Employees transferring without a break in service from a qualified Idaho state agency or from the university to another state agency will be credited with their accrued sick leave by the receiving agency. All unused sick leave is forfeited when an employee is separated from state service. No compensation is made for such unused leave, except as provided in C-12 in the case of employees who are retiring from the university. If an employee returns to state service or to the university within three years after separation, sick leave forfeited at the time of separation will be reinstated.

C-12. Employees who retire and then return to work at the university may not be entitled to reinstatement of sick leave balances. In this instance, only the ***unused*** portion of sick leave that was converted at the time of retirement [C-13 and FSH 3730] to pay for retiree health benefits may be reinstated for employees who separate for retirement purposes and later return to work at the university.

C-13. An employee who retires under the eligibility conditions for retirement as stated in FSH 3730 may apply a pre-determined amount of unused sick leave accrued since July 1, 1976, as payment for continued coverage under the university retiree health program. [FSH 3730, APM 55.39]

D. HOLIDAYS. (Available to UI employees listed in A-6.a and A-6.b as described in Section D)

D-1. The university is closed at least 11 holidays each fiscal year. [FSH 3460 F-2]

D-2. Benefit-eligible employees [A-6.a.] who are employed full time (87.5 percent or greater) receive holiday pay based on eight hours for each holiday. An employee who works a compressed work schedule to include more than eight hours each day, such as four 10-hour workdays in one week, will still receive only eight hours of holiday pay. With supervisor approval, the employee may make up the difference between their regular hours of work and the holiday pay for that day (two hours in this example) through a flexible work schedule within the same work week [FSH 3460], or may use accrued compensatory time or annual leave, or take the time as unpaid.

D-3. Benefit-eligible employees [A-6.a.] who are employed at least half time but less than full-time, are entitled to receive holiday pay, pro-rated based on the average number of hours scheduled each week. The number of hours scheduled on a routine basis (not the hours worked in the week in which the holiday falls) is divided by five days. For example:

Average of 20 hours worked per week / 5 days = 4 hours of holiday pay

Average of 25 hours worked per week / 5 days = 5 hours of holiday pay

Average of 30 hours worked per week / 5 days = 6 hours of holiday pay

D-4. The university embraces diversity and recognizes that our workforce is derived from many diverse cultures to include many different religious preferences. An individual may be absent from work to observe a religious holiday consistent with the individual's own religious beliefs and practices when the day is not consistent with the university's official holidays, provided advance notice is given. Pay for these absences are as follows:

a. Benefit-eligible employees may use their accrued compensatory time or annual leave to receive pay for an observed religious holiday that is not an official university holiday.

b. Employees who are not benefit-eligible, or who do not have compensatory or annual leave available, may observe the holiday without pay, or, with advance supervisory approval, employees may make up the hours in the same work week [FSH 3460].

D-5. Benefit-eligible employees are entitled to holiday pay while they are on other approved paid leave, or during any portion of paid or unpaid family medical leave. Employees on unpaid extended leave are not entitled to holiday pay.

E. PARENTING LEAVE (paid or unpaid). Parenting leave is available to UI employees listed in A-6 (a) who also meet the specific eligibility criteria as described in Section L. Parenting leave is Family and Medical Leave. FMLA allows for 480 hours of unpaid leave for a full-time employee. Eligible University of Idaho employees may use up to 432 hours (prorated for less than full time employees) of Family and Medical Leave as paid parenting leave due to the birth, adoption, or foster placement of the child.

E-1. Definitions.

a. "Parenting" is defined as the period of bonding that occurs within the first 12 months of the birth, adoption or foster placement of a child in the family.

b. "Parenting Leave" is leave taken by an employee under section E to bond with a child within the first 12 months of the birth, adoption or foster placement of the child in the family. Parenting leave is separate and distinct from medical leave taken by a birth mother related to serious health conditions associated with pregnancy and childbirth and from medical leave taken by either parent to care for a child with a serious health condition. See Family Medical Leave Section L-1 for the relationship of Parenting Leave under this Section E and Family Medical Leave under Section L of this FSH 3710.

c. Child for purposes of this policy means a biological son or daughter, adopted, or foster child, a stepchild, a legal ward, or a child of a person standing in loco parentis, who is either under age 18, or age 18 or older and incapable of self-care because of a mental or physical disability. **E-2.** Employees are eligible for paid Parenting Leave if they meet the criteria under L-3. Parenting Leave used under Section E provides some compensation for Parenting Leave under Family Medical Leave and is Family Medical Leave.

a. *Eligible employees will receive a maximum of 432 hours (full-time employees) of paid parenting leave for the birth, adoption, or foster placement of a child that must be used within 12 weeks immediately after the birth, adoption, or foster placement of a child. Eligible employees working less than full time will receive a pro-rated portion of paid parenting leave corresponding to the percentage of hours they normally are scheduled to work.*

b. *An employee may not receive more than 12 weeks of (paid or unpaid) parenting leave in a rolling 12-month period. Multiple births or adoptions within 12 months do not increase the length of parenting leave. Employees may use paid parenting leave continuously for up to 12 weeks or as a predefined reduced work schedule as long as it is used within 12 weeks of the birth or adoption of the child. Employees may not use paid parenting leave intermittently. Adoptive or foster parents are not entitled to use more than 12 weeks of parenting leave in a rolling 12-month period*

but are exempt from the continuous leave requirement if the adoption is not final.

c. *Paid parenting leave is compensated using up to the maximum allotted paid parenting leave balance (432 hours for full time) in the first 12 weeks following the birth, adoption, or foster placement of a child. Paid parenting leave will be paid on regularly scheduled pay dates.*

d. *Paid parenting leave shall run concurrently with leave under the FMLA. Any leave taken under this policy that falls under the definition of circumstances qualifying for leave due to the birth or adoption or foster placement of a child, will be counted toward the 12 weeks of available FMLA leave for a 12-month period. The employee must apply for and use Parenting Leave/FMLA.*

e. *If a holiday occurs while an employee is on parenting leave, such day will be coded to holiday pay and will not count towards the employee's parenting leave entitlement or FMLA hours. If the employee is on parenting leave/FMLA when the University authorizes paid administrative or emergency closure leave due to inclement weather and/or an office closure, that time will be recorded as parenting leave/FMLA. Administrative and emergency closure leave will not extend the parenting leave entitlement.*

E-3. If both parents are employees of the university and eligible for FMLA leave under Section L, the leave must be shared between parents and not exceed 480 hours (12 weeks) of total leave (paid or unpaid).

E-4. Employees can use parenting leave as outlined or choose to use a combination of accrued paid leave or unpaid leave if all other leave is exhausted (See Section N regarding use of unpaid leave). Any leave taken under sections E or L that falls under the definition of circumstances qualifying for leave due to the birth, adoption, or foster placement of a child is FMLA leave. See section L for FMLA criteria. Unpaid leave will be considered in accordance with FMLA and other applicable federal and state laws.

E-5. Parenting Leave shall be applied for through Benefit Services. When the need for Parenting Leave is foreseeable, an employee must request an application at least 30 days in advance of the need for leave. When events are not foreseeable, employees must provide as much notice as is possible. If an employee is eligible for FMLA leave under Section L, the Parenting Leave described in this section E is intended to encompass the university's obligation to provide Family Medical Leave under the federal Family Medical Leave Act. See Section L for return-to-work requirements following approved leave.

E-6. Health benefits continue during Parenting Leave on the same basis as for any similarly-situated employee who is actively at work, regardless of whether the employee is using other forms of accrued leave or taking leave unpaid. The employee's share of cost for health coverage is the amount that is typically payroll-deducted for the employee's own coverage and/or

coverage for the employee's dependents. The employee is responsible for payment of these amounts during leave. Payroll deductions will be continued for any portion of the leave that is paid. During any portion of leave when no pay is received, the employee must make arrangements to self-pay these amounts. Retirement plan contributions, leave accruals, and credit toward vesting are suspended during unpaid portions of Parenting Leave.

E-7. Upon return from Parenting Leave, employees will be assigned to their same or similar position with equivalent pay and status.

E-8. Leave may not be used for both foster care and adoption consecutively if foster placement leads to the adoption of the child.

E-9. Alternate or reduced work schedules are addressed in FSH 3710 L-13.b.

E-10. See FSH 3710 R-1 for exceptions to university leave policies.

F. MILITARY LEAVE. When an employee goes on military leave it is not considered a break in service. (Available to all UI employees as described in Section F)

F-1. Faculty and staff, regardless of whether or not they hold a fiscal-year or academic-year appointment are eligible for leave of up to 120 hours per calendar year for active duty or military training. Employees who are in board-appointed positions [FSH 3080] are eligible for full pay while on paid military leave. When called to active duty or training, the university will pay the difference between military pay received from the U.S. or State government, but cannot duplicate pay. The employee must provide documentation of military pay received during leave, within 90 days of return from leave or upon earlier job separation. The employee is required to repay to the university any amount which exceeds their regular base pay for the same period. Unpaid military leave may be requested if the employee knows their military pay will exceed their university pay. Annual and sick leave credit towards length of service for retirement plan, and other vesting will continue to accrue according to the applicable plan documents. Instead of taking military leave, an employee may request annual leave on the same basis as any other vacation or other time off and if approved, retain full military pay. [APM 55.09 and 55.38]

F-2. Any employee who is called to active duty and/or is required to serve more than 120 hours is eligible for up to five years of military leave. Eligibility for employee health coverage will continue at a minimum through the first 30 calendar days of service while on an approved military leave. The employee will be required to pay the employee share of the health care costs, as well as the costs for the employee's dependents.

F-3. An employee may choose to use annual leave and/or accrued compensatory time for military service and continue to receive pay and benefits at any time.

F-4. Military leave beyond the first 120 hours is generally granted without pay and benefits. Health care coverage will end for the individual who is called to active duty after the first 30 days of service. However, coverage for the employee's dependents may continue and are

subject to the applicable benefits based on the university's current Summary Plan Document at the time of reinstatement: contact Benefit Services.

F-5. An employee may also have the right to life insurance portability or conversion to an individual life insurance policy following termination of benefits in the group plan.

F-6. Upon reinstatement to active university employment, the employee's health plan will resume as if their employment had not been interrupted.

F-7. In accordance with state and federal law, an employee upon return will be reinstated to their former position or a comparable position without loss of seniority, status or pay rate provided the employee returns with an honorable discharge and within five years from departure date from the university.

a. In some situations, re-employment may not be possible, such as when there has been a significant change in circumstances, if re-employment would impose an undue hardship on the university or department, or if the person's employment was temporary in nature, such as positions that are grant-funded for a specific duration and/or temporary help (TH) positions.

1. If the returning employee's skills need upgrading to meet the requirements for a prior or promoted position, the university will make reasonable efforts to refresh or update these skills unless such efforts would create undue hardship for the university.

2. When an employee with a service-related disability is not qualified to perform the essential functions of the employee's job after the university has made reasonable efforts to accommodate the disability, the employee may be placed in another position of comparable pay, rank, and seniority.

b. Employees returning from military leave must provide the university with written timely notification of intent to return to their position. The university may require documentation that the person's application for reemployment is timely and that the person's discharge from uniformed services was under honorable conditions. University procedures will follow the applicable state and federal law, including but not limited to the Uniformed Services Employment & Reemployment Rights Act (USERRA), 38 U.S.C. 4301-4333, enforced by Department of Labor's Veterans' Employment & Training Services (VETS.)

F-8. Retirement benefit contributions are suspended while the employee is on unpaid military leave when the 120 hours per F-1 have been exceeded. Upon reinstatement to active university employment after military leave, reenrollment in the retirement plan will be accomplished in accordance with the plan documents.

a. Credited state service continues during military leave as though no break in employment has occurred.

b. The employee may elect to make up any employee contributions missed during an approved military leave. Such contributions must be paid into the plan within a period not to exceed three times the length of the military leave, up to a maximum of five years.

c. The university will contribute the regularly scheduled match contributions for any employee make-up payments made in connection with an approved military leave.

d. For purposes of determining eligibility for retiree health coverage, military leave will not count as a break in service provided that re-employment occurs within the parameters of this policy. Further, an employee will receive university service credit for purposes of determining eligibility under the Retiree Health Program [FSH 3730] during the 15 days of approved paid military leave; however, the employee will not receive service credit for purposes of determining eligibility under the Retiree Health Program [FSH 3730] for any unpaid military leave.

F-9. This policy is intended to comply with applicable state and federal laws, including the Uniformed Services Employment and Reemployment Rights Act (USERRA) of 1994. To the extent that any provision of this policy is ambiguous and/or contradicts the Act or any other law, the applicable law or Act will prevail.

G. LEAVE FOR COURT REQUIRED SERVICE AND VOTING. (Available to all UI employees as described in Section G)

G-1. Any employee who is summoned for jury duty or subpoenaed as a witness before a court of competent jurisdiction or as a witness in a proceeding before any federal or state administrative agency will be granted leave. Benefit-eligible employees will be granted leave with pay, except as provided below in G-2. Travel expenses in connection with this duty are not subject to reimbursement by the university. [RGP II.I.5.; APM 55.09]

G-2. An employee must request annual leave or personal leave without pay for the following:

a. appearing as a party in a non-job-related proceeding involving the employee;

b. appearing as an expert witness when the employee is compensated for such appearance; or

c. appearing as a plaintiff or complainant, or as counsel for a plaintiff or complainant, in a proceeding in which the Board of Regents or any of its institutions, agencies, school or office is a defendant or respondent. [RGP II.I.5.]

G-3. Polling places are typically open extended hours and absentee voting is widely available. However, employees who are unable to vote outside of scheduled hours will be allowed time off to vote. If available, an employee may use accrued annual leave, compensatory time or, if approved in advance, may be able to make up time lost to vote within the same work week [FSH 3460] through a flexible work schedule. Otherwise, time off will be approved, but unpaid.

H. LEAVE FOR CAMPAIGNING FOR OR SERVING IN PUBLIC OFFICE. Available to UI employees as described in Section H)

H-1. The president approves requests for leaves of absence for the purpose of campaigning for or serving in public office [RGP II. I.5.]. See FSH 6230 E for provisions concerning leave for campaigning and serving in public office.

H-2. It is the Board of Regent's intent that state salary not be duplicated to an employee serving as a member of the Idaho Legislature. Any leave for serving as a member of the Idaho State Legislature will be unpaid when the Legislature is in session [RGP II.I.5.]. Certain benefits may continue during the unpaid leave; however, the employee must pay the full cost of coverage.

I. ADMINISTRATIVE OR EMERGENCY LEAVE. (Available to all UI employees as described in Section I)

I-1. Administrative Leave is leave with pay and benefits. An employee will continue to receive pay and leave accruals in accordance with their regular rate and maintain eligibility for other benefit programs. (Academic transitional leave (J) is not considered administrative leave.)

I-2. At the discretion of the president or designee, an employee may be granted administrative leave when the state or the university will benefit as a result of such leave. [RGP II.I.5.; FSH 3470 B]

I-3. Examples of circumstances that may qualify an employee for administrative leave are volunteer fire fighters attending class off campus, official delegates to the annual general convention of Idaho Public Employees' Association, and members of state or local committees, such as the Human Rights Commission, attending official meetings.

I-4. With the approval of the president or designee, an administrator may also use administrative leave to remove an employee from the workplace (for example during an investigation or to mediate an employee relations issue), if approved in advance by Human Resources. The President's Office or Provost's Office, as appropriate must be notified.

I-5. In all cases involving administrative leave, payroll will coordinate with the department for the appropriate process based on the anticipated duration of the administrative leave. Hours attributed to administrative leave shall be coded as "Administrative Leave" on the time/leave record and in the payroll system.

I-6. In the absence of a written agreement to the contrary, an employee on administrative leave must be available for recall to work during regular university business hours in the event that the employee's services are required or they are otherwise requested to return to work.

I-7. Under certain circumstances, the university may require the use of accrued annual leave and/or compensatory time.

I-8. Emergency Leave with Pay. When the president or designee makes a decision to close, cancel classes, or postpone the opening the university, employees will be authorized Emergency Leave with pay (see APM95.21 and FSH3470). When approved, employees will enter hours as follows for emergency closure days:

Classified and PERSI-eligible TH will enter the hours they would have worked. Exempt and faculty enter leave if leave taken is more than four hours and will record leave only if they were out more than four hours.

a. (TH) Temporary Help (PERSI-eligible only) – enter hours regularly scheduled but not worked due to the closure under the Emergency Leave code, up to eight hours

b. Classified – enter hours not worked due to closure under the Emergency Leave code, up to eight hours

c. Exempt & Faculty – enter hours not worked, if over four, due to closure under the Emergency Leave code, up to eight hours.

J. ACADEMIC TRANSITIONAL LEAVE. (Available to all UI employees as described in Section J)

J-1. Academic transitional leave may apply when an academic administrator steps down from their administrative appointment and assumes a faculty appointment. The purpose of academic transitional leave is to prepare the employee for a new faculty appointment. Transition leave is not available in the event of transition from academic faculty to an administrative appointment. Academic transitional leave is granted at the discretion of the university, must be approved by the provost, and approved by the president or designee.

J-2. There is no accrual of annual leave during the period of academic transitional leave. All other benefits and leave accruals are provided on the same basis as afforded to similarly situated employees in a faculty job classification. Annual leave balances should be exhausted prior to a new academic faculty appointment. Leave balances that cannot be used will be carried forward. If not used, the balance of unused annual leave will be paid at the time of separation of all State of Idaho service. Carry forward of annual leave balances exceeding 80 hours must be approved in advance by Human Resources.

K. SHARED LEAVE. (Available to employees listed in A-6 (a) subject to specific eligibility criteria described in Section K)

K-1. University employees who earn annual leave may donate annual leave hours to shared leave. Shared leave may be donated to a shared leave pool or to the benefit of a specific eligible recipient. See FSH 3710 L-5 below and APM 55.07 for conversion of donated leave to shared leave.

K-2. Eligibility. Benefit-eligible employees, including academic year faculty who do not accrue annual leave, are eligible to receive shared leave. If an employee is only eligible for benefits under the Patient Protection and Affordable Care Act (PPACA) they do not qualify for shared leave.

a. Qualifying Events. If any benefit-eligible employee [A-6.a.] has a health condition [L-2.a.1] or has an immediate family member [A-3] who has such a condition and the employee is

required to take time away from work, and has exhausted all leave, the employee may apply for shared leave.

1. The health condition of the affected individual must be certified by a competent health care provider to be considered as acceptable evidence by the university, and qualify as a serious health condition as defined by family medical leave [L] to include a need resulting from human organ or bone marrow donation. This provision applies only to the acceptable medical conditions of family medical leave. An employee need not meet the service and other requirements of family medical leave to be considered as an absence eligible for shared leave.

2. An applicant for shared leave who has used their own annual leave for purposes other than attending to a medical condition that is known to create potential for an extraordinary need for leave typically is not eligible for leave from the shared leave pool. Under extraordinary circumstances, such an applicant may request an exception to receive shared leave from directed donations.

3. Shared leave that is donated from the shared leave pool is intended for use by employees who intend to return to work. An applicant who wishes to receive shared leave and otherwise meets the criteria of the program and does not intend to return to work may apply for shared leave; however, shared leave in this instance is available only from donations directed specifically to that one recipient.

b. Prerequisites. An employee must use all other available leave such as sick leave, annual leave, and compensatory time to qualify for shared leave. If an employee receives shared leave during the first year of their employment with the university, and does not return to active service for at least thirty days after completion of their leave, they may be expected to repay the compensation they received, unless this requirement is waived by the president or designee.

c. Disability Income. To be eligible for shared leave for the employee's own medical condition that is expected to last longer than thirty days, employees must first apply for wage replacement benefits that may be available through disability coverage. In cases of job-related injuries, employees must first apply for wage replacement through workers' compensation. Once such benefits begin eligibility for shared leave benefits end. However, an otherwise eligible employee may use shared leave while satisfying the waiting period or after exceeding maximum disability periods for income replacement programs. Shared leave cannot be claimed when time away will be paid through wage replacement programs such as disability and workers' compensation benefits.

K-3. Donating Annual Leave.

a. Employees who have an accrued annual leave balance may donate to shared leave regardless of their funding salary source. Donations may be made to the shared leave pool and accessed by any eligible recipient or donated directly to a specific shared leave recipient.

b. Leave donations made for a specific individual will be drawn from donors' accounts based on a first-received basis. The first donation request received by Benefit Services will

be processed before a second donation from other recipients or before hours are withdrawn from the shared leave pool. Donations will be drawn from the donor's annual leave account.

c. Leave donations may be made in any amount of not less than ½-hour (.50) increments.

d. Shared leave donations may not cause the donor's annual leave balance to fall below 40 hours at the time the donation is processed, unless the donor is terminating active employment from the university. Donors should be aware that any shared leave not used by the intended recipient will be returned to the Shared Leave Pool, not returned to the donor(s). Leave donors who desire to donate only as much leave as the intended recipient needs are encouraged to work with HR to make incremental donations to that person.

K-4. Shared Leave Benefits.

a. Maximum Benefit. The maximum shared leave benefit is limited to four (4) working weeks of leave within a rolling 12-month period. Shared leave hours granted will be prorated based on employee's FTE.

b. Recipients of shared leave from the shared leave pool will receive the benefit on a first-come, first-serve basis as the pool balance must not fall below zero dollars. If funds are unavailable from the shared leave pool, then the recipient would be required to solicit direct donations.

c. Shared leave requests are reviewed and granted by Benefit Services in accordance with this policy. Applicants awarded shared leave will be notified in writing; if the request is denied, the reason(s) for denial shall also be stated in writing. The requestor may appeal a denied request for shared leave. Appeals must be made in writing to Human Resources within 30 days from the date of denial and must reference the applicable sections of policy and reasons why there is disagreement. Human Resources will respond to appeals within 30 days.

K-5. Funding and Conversion.

a. Funding for a full year of base salary is provided for most positions. A department typically has received funding for the duration of the employee's full appointment. If an employee is absent without pay, the department would achieve salary savings as a result. The only exceptions would apply to those working from certain special funding sources or who hire a temporary replacement during the period of unpaid leave. Consequently, the department of the employee who will receive shared leave is responsible for funding the employee's pay during leave from shared leave donations.

b. Conversion for donations. Hours donated by an employee are calculated at the donor's hourly rate and converted to dollars that will be distributed to the recipient using the recipient's hourly rate. Direct donations donors should be aware that if the conversion value from donated hours is greater than the intended recipient uses, any unused dollars will go into the Shared Leave Pool.

L. FAMILY MEDICAL LEAVE. (Available to all UI employees subject to specific eligibility criteria described in Section L). Federal Family and Medical Leave Act 29 U.S.C 2601 and amendments will be followed when administering FMLA. Upon exhaustion of FMLA, when there is a continued need for leave for an employee's own serious health condition, federal and state guidance will be followed.

L-1. Family medical leave may be requested by an eligible employee for the following reasons:

a. the birth of a child of the employee and/or in order to care for such child;

b. the placement of a child with the employee for adoption or foster care;

c. to care for an immediate family member as defined in [A-3] of this policy with a serious health condition as defined in [L-5] of this policy;

d. because of the employee's own serious health condition [L-5]; or

e. to serve as a human organ or bone marrow donor.

The entitlement to leave under subparagraphs (a) and (b) of this section L-1 for a birth or placement of a child is encompassed in the Parenting Leave described in Section E, of this policy. Parenting Leave taken under Section E. is Family Medical Leave and shall be counted as Family Medical Leave.

L-2. Family medical leave and/or service member family medical leave is generally leave without pay. However, when the absence also qualifies for the use of sick leave, if available, employees must first use accrued sick leave. See Parenting Leave for wage replacement.

L-3. Eligibility. If the employee has been employed by the university for a minimum of 12 months and has worked at least 1250 hours during the previous 12 month period prior to the requested leave, the employee is eligible for family medical leave. This eligibility requirement applies to eligibility for Parenting Leave under Section E.

L-4. Length of Leave. A maximum of up to 12 weeks or a total of 480 hours of family medical leave may be granted to eligible full-time employees during a rolling 12 month period. Eligible part-time employees may be granted up to 12 working weeks of leave or a total number of hours consistent with their regular work schedule within a 12-week period. (i.e. 20 hours per week x 12 weeks = 240 hours). The period is measured from the date the employee last used/exhausted family medical leave or became employed by the university to the date leave is to begin. Family medical leave may be taken on a continuous, intermittent, or reduced-hour basis. See Section E for parenting leave requirements.

L-5. Definitions.

a. "Serious health condition" is defined as an illness, injury, impairment or physical or mental condition that involves any period of incapacity or treatment connected with in-patient care (i.e. overnight stay) in a hospital, hospice, or residential medical-care facility, and any period of

incapacity or subsequent treatment in connection with such in-patient care; continuing treatment by a health care provider, which includes any period of incapacity (i.e. inability to work, attend school, or perform other regular daily activities) due to a health condition (including treatment for or recovery from) lasting more than three consecutive days; and any subsequent treatment or period of incapacity relating to the same condition, that also includes:

1. treatment two or more times by or under the supervision of a health care provider; or one treatment by a health care provider with a continuing regimen of treatment; or

2. pregnancy or prenatal care. A visit to the health care provider is not necessary for each absence; or

3. chronic serious health condition, which continues over an extended period of time, requires periodic visits to a health care provider, and may involve occasional episodes of incapacity (e.g. asthma, diabetes). A visit to a health care provider is not necessary for each absence; or

4. permanent or long-term condition for which treatment may not be effective (e.g. Alzheimer's, a severe stroke, terminal cancer). Only supervision by a health care provider is required, rather than active treatment; or

5. absences to receive multiple treatments for restorative surgery or for a condition which would likely result in a period of incapacity of more than three days if not treated (e.g. chemotherapy or radiation treatments for cancer).

6. Conditions for which cosmetic treatments are administered (such as most treatments for acne or plastic surgery) are not serious health conditions unless inpatient hospital care is required or unless complications develop. Ordinarily, unless complications arise, the common cold, the flu, ear aches, upset stomach, minor ulcers, headaches other than migraine, routine dental or orthodontia problems, periodontal disease, etc., are examples of conditions that do not meet the definition of a serious health condition and do not qualify for FMLA leave. Restorative dental or plastic surgery after an injury or removal of cancerous growths are serious health conditions provided all the other conditions of this section are met. Mental illness or allergies may be serious health conditions, but only if all the conditions of this section are met.

L-6. Health benefits continue during family medical leave on the same basis as for any similarly situated employee who is actively at work, regardless of whether the employee is using other forms of compensation including accrued leave or taking leave unpaid. The employee's share of cost for health coverage is the amount that is typically payroll-deducted for the employee's own coverage and/or coverage for the employee's dependents. The employee is responsible for payment of these amounts during leave. Payroll deductions will be continued for any portion of the leave that is paid. During any portion of leave when no pay is received, the employee must make arrangements to self-pay these amounts. Retirement plan contributions, accruals for sick and annual leave and credit toward vesting are suspended during unpaid portions of family medical leave.

L-7. All qualified absences, including those due to a work-related injury, will be considered as family medical leave.

L-8. If there are reasonable circumstances to support that an employee's absence qualifies as family medical leave, the university has the right to classify such absence as family medical leave.

L-9. When the need for family medical leave is foreseeable, an employee must request an application for family medical leave at least 30 days in advance of the need for leave. Application assistance is available from Benefit Services. When events are not foreseeable, employees must provide as much notice as is possible. Application for family medical leave after a return from absence is not recommended; rights to preserved employment and benefits may be adversely affected. In any event, absent extraordinary circumstances, an employee may not claim an absence as a qualified family medical leave event unless done so within the first two days of return from an absence. See Parenting Leave Section E.

L-10. When leave is taken for personal illness or to care for an immediate family member with a serious health condition, leave may be continuous or intermittent and may include a reduction in hours worked. For intermittent leave, the employee must provide certification from the health care provider caring for the employee and/or family member stating the leave must be taken intermittently. Employees needing intermittent leave must attempt to schedule their leave so as not to disrupt university operations. The university reserves the right to assign an employee to an alternative position with equivalent pay and benefits that better accommodates the employee's intermittent or reduced leave schedule.

L-11. Employees on family medical leave are required to provide documentation to Benefit Services as requested, including intent to return to work. During leave, the university may require an employee to re-certify the medical condition that caused him/her to take leave. A return-to-work release from the health care provider is required before an employee absent due to their own serious health condition may return to work.

L-12. Family medical leave requests for medical treatment or care giving requires certification from the health care provider documenting medical necessity.

L-13. Family medical leave requests for parenting must be approved in advance and completed within 12 months of the birth, adoption, or foster care placement of a child. See Section E for Parenting Leave requirements. Shared leave (if granted) may be used for the disability period related to childbirth. See Section K for Shared Leave and Section E for Parenting Leave requirements.

L-14. Family medical leave taken by two university employees to care for a family member who has a serious health condition consists of a maximum 12 weeks of leave for each employee. See Section E for Parenting Leave requirements.

L-15. If the university obtains information from a credible source, such as the workers' compensation authority, disability carrier, or a medical practitioner, that alters, changes,

casts doubt, or fails to support continued leave or the leave application, the university has the right to:

a. revoke leave;

b. not grant leave;

c. require new evidence to support the leave request;

d. require the employee to return to work if the leave is not substantiated; and/or

e. when appropriate under applicable employee discipline policies [FSH 3910, 3920, and 3930], take disciplinary action, up to and including dismissal.

L-16. Upon return from family medical leave, employees will be assigned to their same or similar position with equivalent pay and status with or without reasonable accommodation, as appropriate, in accordance with the Americans with Disabilities Act. Job reassignment must be coordinated with Employment Services and approved by Human Resources. The university has no obligation to restore employment to temporary hourly (TH) or other employees if the employment term or project is over and the university would not otherwise have continued employment.

L-17. Family medical leave is not available for individuals who do not plan to return to work. An employee who applies for and is granted family medical leave and fails to return to work for at least 30 days upon the expiration of their family medical leave period may be obligated to repay the costs of health coverage and any portion of paid parenting leave provided by the university during any portion of family medical leave. If the university is notified that the employee does not intend to return to work, the family medical leave period will terminate immediately and the employee will be separated from employment on that date. Medical, dental and under some circumstances Health Care Spending Accounts may be continued through the Consolidated Omnibus Budget Reconciliation Act (COBRA). Options for life insurance portability or conversion may also be available. Job separation under these circumstances will result in a lump sum payment of annual leave and/or compensatory balances. In addition, the employee will no longer have a right to restoration to the same or equivalent position.

M. SERVICE MEMBER FAMILY AND MEDICAL LEAVE. The federal Family and Medical Leave Act (FMLA) now entitles eligible employees to take leave for covered family members' service in the Armed Forces (Service member Family and Medical Leave) in two instances. This section of the policy supplements the above family medical leave policy and provides general notice of employee rights to such leave. Except as stated below, an employee's rights and obligations to service member family and medical leave are governed by the general family medical leave policy.

M-1. Definitions: The following definitions are applicable to this section of the policy.

a. "Eligible employee" is a spouse, son, daughter, parent, or for purposes of caring for a family member, the next of kin of a covered family member.

b. "Next of kin" is the nearest blood relative of a family member who is in the Armed Forces.

c. "Covered family member" means any family member who is a member of the Armed Forces, including a member of the National Guard or Reserves, regardless of where stationed and regardless of combative activities.

d. A "covered veteran" is an individual who was a member of the armed forces (including a member of the National Guard or reserves) and was discharged or released under conditions other than dishonorable at any time during the 5-year period before the first date the eligible employee takes FMLA leave to care for the covered veteran.

1. An eligible employee must begin leave to care for a covered veteran within five years of the veteran's active duty service, but the "single 12-month period" may extend beyond the five-year period.

M-2. Leave Entitlement: Eligible employees are entitled to take service member family and medical leave for any one, or for a combination of the following reasons:

a. Any "qualifying exigency" (as defined by the Secretary of Labor) arising out of the fact that the spouse, or a son, daughter, or parent of the employee is on active duty or has been notified of an impending call or order to active duty in the Armed Forces in support of a "contingency operation," and/or

b. To care for a covered family member who has incurred an injury or illness in the line of duty while on active duty in the Armed Forces, or that existed before the beginning of the member's active duty and was aggravated by service in the line of duty on active duty in the armed forces, provided that such injury or illness may render the covered family member medically unfit to perform duties of the family member's office, grade, rank or rating.

c. In the case of a covered veteran, an injury or illness that was incurred by the member in the line of duty on active duty in the armed forces (or existed before the beginning of the member's active duty and was aggravated by service in the line of duty on active duty in the armed forces) and manifested itself before or after the member became a veteran and is:

1. A continuation of a serious injury or illness that was incurred or aggravated when the covered veteran was a member of the armed forces and rendered the service member unable to perform the duties of the service member's office, grade, rank, or rating; or

2. A physical or mental condition for which the covered veteran has received a U.S Department of Veterans Affairs Service-Related Disability (VASRD) rating of 50 percent or greater, and such VASRD rating is based, in whole or in part, on the condition precipitating the need for military caregiver leave; or

3. A physical or mental condition that substantially impairs the covered veteran's ability to secure or follow a substantially gainful occupation by reason of a disability or disabilities related to military service, or would do so absent treatment; or

4. An injury, including a psychological injury, on the basis of which the covered veteran has been enrolled in the U.S Department of Veteran's Affairs Program of Comprehensive Assistance for Family Caregivers.

M-3. Duration of service member family and medical leave:

a. When leave is due to a qualifying exigency: an eligible employee may take up to 12 work weeks of leave during any 12-month period.

b. When leave is to care for a covered family member: an eligible employee may take up to 26 workweeks of leave during a single 12-month period to care for the covered family member. Leave to care for a covered family member, when combined with other qualifying family medical leave may not exceed 26 weeks in a single 12-month period.

c. Concurrent leave: service member family and medical leave runs concurrent with other leave entitlements provided under federal, state and local law.

N. PERSONAL LEAVE. (Available to UI employees listed in A-6.a and A-6.b as described in Section N.)

N-1. Any employee not covered by another university leave type within this policy may request a personal leave of absence.

N-2. Personal leave is leave without pay and without benefits. However, the university may require the use of sick, annual or any other type of accrued leave if the absence qualifies and leave is available. Personal leave may be taken with pay and benefits when other paid leave such as annual leave is taken concurrently. In rare circumstances, leave may be approved without pay, with continued benefits, but only when approved as an exception and only when doing so meets the business needs of the university. Hiring units are responsible for funding the benefits under these circumstances. [APM 55.38]

N-3. Reasons for requesting a personal leave may include, but are not limited to, religious, personal, and educational matters or for extension of any leave when all other leaves have been exhausted.

N-4. All requests for personal leave must be made to the supervisor in writing. A leave of three working days or less can be approved by the supervisor and are recorded on the employee's time record as Leave Without Pay with Benefits. The president or designee (i.e., provost) must approve a personal leave which exceeds three working days. Personal leave is not guaranteed and is granted on a case-by-case basis, with the approval of the supervisor and the unit administrator, based on the business needs of the university.

N-5. The president or designee (i.e. provost) may grant personal leave without pay with or without benefits for a period of up to one calendar year, with extensions not to exceed a total of three successive calendar years [RGP II.I.5.]. Consideration is given to such requests on an individual basis in the light of the reason for which it is requested, whether it is leave with or without paid benefits and the effect that granting it will have on the employee's unit or program.

N-6. When a personal leave of absence is granted, the university assures reinstatement of the individual to a position of similar status and pay, but only to the extent that such position continues to exist and would have continued to exist had no leave been taken. Return to work in the same job within the same department is not promised.

N-7. During personal leave without pay an employee is not eligible for holiday pay, the accrual of sick or annual leave, or the use of medical appointment leave, and may not be granted any other type of leave of absence such as family medical or military leave until the employee has first returned to work under active status and otherwise qualifies for such leave.

N-8. An employee who has received approval from the president or designee for a personal leave without pay without benefits may not continue to contribute toward and receive the benefits of the institution's insurance and retirement programs, Employees should consult Benefits Services for more detailed information on how personal leave without pay will impact their benefits and their rights to continue coverage through COBRA and life insurance conversion or portability. [APM 55.09 and 55.38]

N-9. Employees who are granted a personal leave of absence without pay are responsible for making arrangements with Benefit Services, before the leave begins, for the continuation or discontinuation of benefits. Also, they should call Benefit Services on their return to active status to make sure that any benefits that had been discontinued are reinstated or to adjust for changes that occurred while they were on leave. [APM 55.38]

N-10. Personal leave is not intended as a vehicle to continue benefits for periods when employees are not working due to academic or seasonal work schedules or for a reduction in hours.

O. LEAVE FOR PROFESSIONAL IMPROVEMENT. (Available to faculty with instructor rank or above, exempt employees and classified staff as described in Section O.)

O-1. Leave for professional improvement is paid leave with benefits for the purpose of participating in professional development programs or experiences for an extended period of more than two weeks to attain or enhance a skill set that will result in a mutual benefit to the both the university and the employee.

O-2. Members of the faculty who hold the rank of instructor or above, exempt employees, and classified staff are encouraged to participate in programs of professional improvement. (Tenured faculty may also be eligible for sabbatical leave and should refer to FSH 3720.) Generally, on the recommendation of an applicant's administrative supervisor, and with the approval of the dean/director and the provost/vice president, professional improvement leave

may be granted under the following conditions (individual departments may have additional requirements and restrictions):

a. To participate in this plan, the faculty or staff member must have completed four years of service before the time the leave is to begin.

b. Generally, at least two years of service must intervene between a sabbatical leave and a leave for professional improvement or at least five years of service must intervene between a leave for professional improvement and a subsequent request for the same type of leave.

0-3. The employee requests professional improvement leave with pay by submitting a letter of application to the supervisor at least three months before the leave is to begin. The letter should address the professional development to be derived from the leave, what activities (i.e. research, writing, experience, etc.) will be involved to achieve the professional goals, the duration of the leave, the level of support requested, and the source of funds, if known.

0-4. Persons granted leave under this policy are expected either to return to the active service of the university for at least one academic or other full work year after completion of the leave, or are required to repay the money received from the university for the period of professional improvement leave granted.

0-5. The employee must submit a report to the supervisor, the dean/director, and the provost/president regarding his or her developmental experience upon return to active work status.

0-6. The employee may request approval to use accrued annual leave and to have an equal amount of administrative leave with pay granted to permit the employee's participation in a program of professional improvement.

P. EXCEPTIONS. Exceptions to these policies may be considered to the extent that such an exception is not contrary to state and federal laws, the Board of Regents policies and procedures, and are considered in the best interest of the university. The respective unit administrator, Human Resources, and the president or designee as required, can grant exceptions. A request for exception must be submitted and approved by the supervisor and forwarded to Human Resources for further consideration of all approvals.

Version History

Amended January 2020. Changes were made pursuant to FSH 1460 C-3 to comply with Idaho Code 59-1608 and 67-5343 and for clarification purposes.

Amended July 2017. Edits were made for clarification purposes and cleanup.

Amended July 2016. Many changes were put in place to comply with federal regulation changes on family medical leave.The section on Parenting Leave was revised, and changes were made to allow employees more flexibility in leave use.

Amended July 2015. Changes were made to comply with federal regulation changes on family medical leave, a new section on Parenting Leave was added, and to allow employees more flexibility in leave use.

Amended July 2011. Section R was removed and a new policy, FSH 3450, was created to address employment actions such as temporary furloughs.

Amended July 2010. Section R was added to address the Fiscal Year 2010 Furlough.

Amended July 2008. Changes were approved following work involving Faculty and Staff Affairs, General Counsel, and Human Resources and a new section M was added on servicemember family leave due to a federal law change.

Amended 2002. Extensive changes were made to subsection K that reflected Regent policy and current practice.

Adopted 1979.

3710

LEAVE POLICIES FOR ALL EMPLOYEES

LAST REVISION:
x
CONTENTS:

A. General

B. Annual Leave

C. Sick Leave

D. Holidays

E. Parenting Leave

F. Military Leave

G. Leave for Court Required Service and Voting

H. Leave for Campaigning for or Service in Public Office

I. Administrative Leave

J. Academic Transitional Leave

K. Shared Leave

L. Family Medical Leave

M. Service member Family and Medical Leave

N. Personal Leave

O. Leave for Professional Improvement

P. Exceptions

A. GENERAL.

A-1. The University of Idaho (hereinafter referred to as university) strives to offer leave programs that are both comprehensive and flexible to meet employee needs. Leave with or without pay is

extended to employees under a variety of circumstances described below. Exceptions may be granted in special circumstances [see R below; APM 55.09, 55.07, 55.38; FSH 3120, 3720 and 6230]

A-2. The term "leave" refers to an employee's absence from duty. Each leave type as contained in this policy discusses circumstances in which such an absence may be continued with pay when leave accruals are available or when leave is approved without pay. Certain types of leave may require or provide options to take one leave concurrent with another. For example, sick and annual leave may be taken or may be required to be taken concurrently with other types of leave. All leaves are subject to approval.

A-3. Unless otherwise noted, for purposes of this policy, "immediate family member" includes: your spouse, your child, parent, brother, sister, grandparent, and these same relationships of a spouse, by marriage, adoption, or foster arrangement. An immediate family member may also include an individual who has assumed a similar relationship to those above, other than the relationship of spouse*, and for whom the employee or the individual has had financial responsibility for the other. An immediate family member also may include any individual who is a qualified dependent under IRS regulations. The university reserves the right to request documentation establishing financial responsibility or qualifying status as an IRS dependent. Federal FMLA criteria will be used in determining "immediate family member".

*Due to the 2006 "marriage amendment" to the Idaho Constitution the university, despite the wishes of the Faculty Senate, is unable to include domestic partnerships.

A-4. Separation from employment or the term terminating employee refers to an employee's separation from all employment.

A-5. A break in State of Idaho service is defined as job termination that is separated by at least three business days prior to re-employment with the university or any other State of Idaho employer.

A-6. Full and part-time employees are eligible for some or all leaves discussed in this policy.

a. Benefit-eligible employees are those who hold a board-appointed position [FSH 3080] and are employed at least half time or greater.

b. Individuals who are employed at least half time or greater as temporary help (TH) and who are expected to complete five months or more of continuous university service and are eligible to participate in the Public Employers Retirement Plan for Idaho (PERSI) are eligible for limited benefits, including annual leave, sick leave and pay for holidays on which they do not work [FSH 3090].

A-7. Leave may not be taken in advance of accrual and may not be taken in excess of 80 hours in a pay period.

A-8. Leave may not be taken on an employee's first day of employment. If an employee is unable to report for work on their specified first day of employment; employment will not begin until the first day that the employee reports for active duty.

A-9. All employees, including faculty and exempt employees, are responsible for recording all leave taken on bi-weekly time reports and complying with the terms of leave policies, including, but not limited to:

a. completing application for leave with supervisor or Human Resources as appropriate and providing any medical evidence to HR and other requested information;

b. abiding by any and all return-to-work restrictions; and

c. returning to work following expiration of approved leave.

Failure to uphold these responsibilities may result in absence without approved leave. Eligibility to preserve employment may be affected and/or the employee may be subject to disciplinary action, up to and including termination from employment as provided in appropriate university policies [FSH 3910, 3920 and 3930].

A-10. Exempt employees (full-time 40 hours per week expectation per FLSA) who work at least four hours in a day will be paid regular pay for the full day. If they work fewer than four hours, the difference will be charged to the appropriate accrued leave. If the employee is on approved Family and Medical Leave (FML) they must report each hour missed.

Employees who are not exempt from earning overtime accrual or payments shall record all approved absences in 1/4-hour increments, except when time loss has been made up through an approved flexible schedule.

A-11. Absent written agreement to the contrary, an eligible employee typically earns credit toward retirement plan vesting (see your PERSI, IORP or federal retirement plan document for details) and earns annual and sick leave accruals during the portion of any leave that is paid, except that sick and annual leave do not accrue in some circumstances during administrative leave. See I-7. An employee typically will not be given such credit for any periods of unpaid leave.

A-12. No break in service will occur during any approved paid or unpaid leave for the purposes of determining eligibility for retiree health benefits.

A-13. Attendance at work is a job requirement for all positions at the university. Excessive absenteeism can affect job performance and the employee may be subject to disciplinary action.

A-14. Departmental administrators are responsible for approving and ensuring the reporting of leave, via Banner, taken by the employees in their respective units. For procedures regarding reporting and monitoring leave see APM 55.09. The Banner system and Human Resources records are the official university leave records.

A-15. Human Resources is responsible for coordinating requests and reviewing compliance with all types of leave other than sick, annual and medical appointment leave discussed in this section. [APM 55.09]

B. ANNUAL LEAVE. (Available to UI employees listed in A-6 (a) and A-6 (b) as described in Section B)

B-1. Employees receive annual leave based on their classification of employment. [FSH 3080]

a. Classified Employees on full-time fiscal-year appointments accrue annual leave based on hours worked at the rate of approximately 3.7 hours bi-weekly for the first five full years of service, with a maximum accumulation of 192 hours; 4.6 hours bi-weekly up to 10 years of service, with a maximum accumulation of 240 hours; 5.5 hours bi-weekly up to 15 years of service with a maximum accumulation of 288 hours; and 6.5 hours bi-weekly for more than 15 years of service with a maximum accumulation of 336 hours. [RGP II.E.3; FSH 3080; APM 55.09]

b. Faculty on full-time fiscal-year appointments and exempt employees, including postdoctoral fellows, accrue annual leave at the rate of 7.4 hours bi-weekly and may accumulate a maximum of 240 hours. [RGPP II.F.3, FSH 3080, APM 55.09]

c. Faculty who hold academic-year appointments do not accrue annual leave. Their periods of obligation and leave are governed primarily by the academic calendar, subject to stipulation by the employee's dean. [FSH 3120]

B-2. Annual leave for classified and exempt appointment of less than 100% full-time, but equal to or greater than half-time, is accrued based on hours worked and at a rate based on the employee's classification [B-1]. No annual leave is accrued for less than half-time service.

B-3. Temporary employees who are eligible for PERSI accrue annual leave beginning on the first day of employment in an eligible position at a rate of .04625 times hours worked within each bi-week.

B-4. Annual leave accrual is temporarily suspended when the accumulation reaches the maximum allowance. Once the leave accumulation drops below the allowed maximum, accruals resume.

B-5. Employees eligible for overtime earn overtime based on only hours worked. There is no overtime accrual based on annual leave, sick leave, compensatory time, holidays or any other paid time off.

B-6. Annual leave continues to accrue while on any paid leave, except that annual leave does not accrue on hours of compensatory time used; during academic transitional leave [J] or for temporary employees who accrue annual leave based only on hours worked.

B-7. At the employee's option, accrued annual leave may be used during any approved leave that could otherwise be taken as sick leave.

B-8. Annual leave must be scheduled in advance and requested in writing by the employee. Annual leave may not be taken without the supervisor's written approval. Both the employee's vacation preference and business needs of the unit must be considered in establishing mutually agreed periods of leave [APM 55.09].

a. Supervisors are responsible for coordinating and approving requests for annual leave of all employees in their respective units.

b. An employee on approved annual leave, who becomes eligible to use sick leave through unforeseen events, may use sick leave in lieu of annual leave. Documentation to support the use of sick leave may be required.

B-9. Annual leave balances are paid to employees upon separation (i.e. resignation, retirement layoff, non-renewal, termination) from all State of Idaho employment [I.C. 67-5334]. Leave balances are transferred from the university to other State of Idaho employers when the university employment ends and a new position is accepted with any State of Idaho employer when there is no break in state service [A-5]. However, the university reserves the right to require an employee to exhaust some or all annual leave prior to any job or employment separation.

Employees funded on grants or contracts are expected to use all earned annual leave during the appointment before expiration of the grant(s) or contract(s). Employees separating employment upon the expiration or termination of a grant or contract, will be required to use annual leave before their last day of employment.

In the event of an employee's death, payment is made to the employee's estate.

The effective date of the employee's separation is the last day on which the employee reports to work for the university, unless Human Resources has approved a written request for alternative termination arrangements that are in the best interests of the university.

In the event that an academic administrator transitions from a position eligible for annual leave to a faculty position in which annual leave does not accrue, balances should be exhausted prior to the start of the new appointment. Leave balances that cannot be used will be carried forward. If not used, the balance of unused annual leave will be paid at the time of separation of all State of Idaho service. Carry forward of annual leave balances exceeding 80 hours must be approved in advance by Human Resources.

B-10. Any individual, regardless of type of appointment, with an annual leave balance who transfers or who is reassigned to another unit within the university may be required to exhaust all existing annual leave prior to starting the new assignment.

B-11. Payment in lieu of annual leave taken for any reason other than separation from employment is granted only by exception or under other special circumstances within the business needs of the university.

B-12. Eligibility requirements for annual leave for temporary help (TH) can be found in FSH 3090.

C. SICK LEAVE. (Available to UI employees listed in A-6 (a) and A-6 (b) as described in Section C)

C-1. Employees that work at least 40 hours in a bi-weekly pay period for at least five consecutive months accrue sick leave. Accrual is approximately 3.7 hours bi-weekly for full-time service. [FSH 3090 C]

C-2. Sick leave accumulation for half-time but less than full-time service is accrued proportionately based on hours worked and earned at the rate of .04625 for each hour worked.

C-3. Sick-leave may be accumulated without limit.

C-4. Sick leave cannot be taken in advance of accrual. If, at the end of a bi-weekly pay cycle, absences exceed sick leave accumulation, the hours will be charged to compensatory time first, if available, and then to annual leave. If there is no leave accumulation, time will be unpaid.

C-5. Sick leave continues to accrue while on any paid leave, except for hours of compensatory time used and during academic transitional leave [J].

C-6. Sick leave may not be used in lieu of annual leave, except when the conditions of B-8. b. above have been met.

C-7. Sick leave may be taken only as follows:

a. Illness or Serious Medical Condition of Employee. An employee's own illness, injury, or childbirth that prevents the employee from performing their assigned duties; or in the event of exposure to contagious disease if, in the opinion of responsible authority, the health of others would be jeopardized in the work place.

b. Illness or Serious Medical Condition of an Immediate Family Member. When the illness, injury, or childbirth of an immediate family member as defined in A-3 of this policy requires the attendance of another, the employee may use their own available sick leave.

c. Death of an Immediate Family Member. In the event of a death of an immediate family member as defined in A-3 of this policy; up to 15 days of sick leave may be used immediately following the event, but can be extended if there are special circumstances. The unit administrator and Human Resources may approve an extension of leave for up to a total of 30 days of sick leave.

d. Death of a Family Member. Sick leave usage for the death of a family member other than a member of the immediate family as defined in A-3 of this policy is limited to a maximum of five days of sick leave immediately following the event.

e. Medical Appointments. Personal or family appointments for medical, dental, optical treatment or examination, or meeting with an Employee Assistance Program professional, including time for travel to and from such appointments. An employee is allowed up to two hours of time off per month for such appointments without charge to sick leave provided prior notification was provided to the employee's supervisor regarding the needed time away (medical information need not be shared only the need for leave). If the employee has absences totaling more than two hours in a month, such absences must be reported and charged to sick leave. There is no carryover balance from month-to-month.

f. Parenting/Adoption/fostering. All eligible employees are entitled to use sick leave for parenting, adoption, and fostering as provided in E. Parenting Leave.

g. Organ Donation. Full-time employees may use up to five workdays of prior approved organ donation leave to serve as a bone marrow donor and may use up to 30 workdays of prior approved organ donation leave to serve as a human organ donor. Documentation must be provided to Human Resources in advance of the use of Bone Marrow or Organ Donation leave. Bone Marrow or Organ Donation leave does not reduce the employee's leave balances and is with continued pay and benefits up to the limits noted. Additional leave may be requested through an approved family medical [L] or personal [N] leave.

C-8. Documentation may be required to be submitted to Human Resources to support absences. Absences that occur during an approved family medical leave [L] are exempt from these requirements.

C-9. The federal Family Medical Leave Act of 1993 (FMLA) was adopted as law to protect the best interest and job security of employees. The university may initiate family medical leave (FML) and will apply FML concurrently with sick leave when the employee's own illness, work-related injuries, or an illness of a family member is covered by FML.

C-10. An employee may be eligible for FML after three (3) consecutive days of sick leave, unpaid or other absence [L-4] and may initiate a request for FML at any time prior to an absence which they suspect may qualify. However, the university may also initiate FML and will typically take steps to determine if an absence qualifies as FML when an employee has missed five consecutive workdays or longer by providing the employee with a medical certification form and FML application. A failure to comply with a request to complete and return the medical certification form and the FML application may result in absence without pay and/or disciplinary action, up to and including dismissal from employment (see FSH 3910, 3920 and 3930).

C-11. Employees transferring without a break in service from a qualified Idaho state agency or from the university to another state agency will be credited with their accrued sick leave by the receiving agency. All unused sick leave is forfeited when an employee is separated from state service. No compensation is made for such unused leave, except as provided in C-12 in the case of employees who are retiring from the university. If an employee returns to state service or to the university within three years after separation, sick leave forfeited at the time of separation will be reinstated.

C-12. Employees who retire and then return to work at the university may not be entitled to reinstatement of sick leave balances. In this instance, only the ***unused*** portion of sick leave that was converted at the time of retirement [C-13 and FSH 3730] to pay for retiree health benefits may be reinstated for employees who separate for retirement purposes and later return to work at the university.

C-13. An employee who retires under the eligibility conditions for retirement as stated in FSH 3730 may apply a pre-determined amount of unused sick leave accrued since July 1, 1976, as payment for continued coverage under the university retiree health program. [FSH 3730, APM 55.39]

D. HOLIDAYS. (Available to UI employees listed in A-6.a and A-6.b as described in Section D)

D-1. The university is closed at least 11 holidays each fiscal year. [FSH 3460 F-2]

D-2. Benefit-eligible employees [A-6.a.] who are employed full time (87.5 percent or greater) receive holiday pay based on eight hours for each holiday. An employee who works a compressed work schedule to include more than eight hours each day, such as four 10-hour workdays in one week, will still receive only eight hours of holiday pay. With supervisor approval, the employee may make up the difference between their regular hours of work and the holiday pay for that day (two hours in this example) through a flexible work schedule within the same work week [FSH 3460], or may use accrued compensatory time or annual leave, or take the time as unpaid.

D-3. Benefit-eligible employees [A-6.a.] who are employed at least half time but less than full-time, are entitled to receive holiday pay, pro-rated based on the average number of hours scheduled each week. The number of hours scheduled on a routine basis (not the hours worked in the week in which the holiday falls) is divided by five days. For example:

Average of 20 hours worked per week / 5 days = 4 hours of holiday pay

Average of 25 hours worked per week / 5 days = 5 hours of holiday pay

Average of 30 hours worked per week / 5 days = 6 hours of holiday pay

D-4. The university embraces diversity and recognizes that our workforce is derived from many diverse cultures to include many different religious preferences. An individual may be absent from work to observe a religious holiday consistent with the individual's own religious beliefs and practices when the day is not consistent with the university's official holidays, provided advance notice is given. Pay for these absences are as follows:

a. Benefit-eligible employees may use their accrued compensatory time or annual leave to receive pay for an observed religious holiday that is not an official university holiday.

b. Employees who are not benefit-eligible, or who do not have compensatory or annual leave available, may observe the holiday without pay, or, with advance supervisory approval, employees may make up the hours in the same work week [FSH 3460].

D-5. Benefit-eligible employees are entitled to holiday pay while they are on other approved paid leave, or during any portion of paid or unpaid family medical leave. Employees on unpaid extended leave are not entitled to holiday pay.

E. PARENTING LEAVE (paid or unpaid). Parenting leave is available to UI employees listed in A-6 (a) who also meet the specific eligibility criteria as described in Section L. Parenting Leave is Family and Medical Leave. FMLA allows for 480 hours of unpaid leave for a full-time employee. Eligible University of Idaho employees may use up to 432 hours (prorated for less than full time employees) of Family and Medical Leave as paid parenting leave due to the birth, adoption, or foster placement of the child.

E-1. Definitions.

a. "Parenting" is defined as the period of bonding that occurs within the first 12 months of the birth, adoption or foster placement of a child in the family.

b. "Parenting Leave" is leave taken by an employee under section E to bond with a child within the first 12 months of the birth, adoption or foster placement of the child in the family. Parenting leave is separate and distinct from medical leave taken by a birth mother related to serious health conditions associated with pregnancy and childbirth and from medical leave taken by either parent to care for a child with a serious health condition. See Family Medical Leave Section L-1 for the relationship of Parenting Leave under this Section E and Family Medical Leave under Section L of this FSH 3710.

c. Child for purposes of this policy means a biological son or daughter, adopted, or foster child, a stepchild, a legal ward, or a child of a person standing in loco parentis, who is either under age 18, or age 18 or older and incapable of self-care because of a mental or physical disability. **E-2.** Employees are eligible for paid Parenting Leave if they meet the criteria under L-3. Parenting Leave used under Section E provides some compensation for Parenting Leave under Family Medical Leave and is Family Medical Leave.

a. *Eligible employees will receive a maximum of 432 hours (full-time employees) of paid parenting leave for the birth, adoption, or foster placement of a child that must be used within 12 weeks immediately after the birth, adoption, or foster placement of a child. Eligible employees working less than full time will receive a pro-rated portion of paid parenting leave corresponding to the percentage of hours they normally are scheduled to work.*

b. *An employee may not receive more than 12 weeks of (paid or unpaid) parenting leave in a rolling 12-month period. Multiple births or adoptions within 12 months do not increase the length of parenting leave. Employees may use paid parenting leave continuously for up to 12 weeks or as a predefined reduced work schedule as long as it is used within 12 weeks of the birth or adoption of the child. Employees may not use paid parenting leave intermittently. Adoptive or foster parents are not entitled to use more than 12 weeks of parenting leave in a rolling 12-month period*

but are exempt from the continuous leave requirement if the adoption is not final.

c. *Paid parenting leave is compensated using up to the maximum allotted paid parenting leave balance (432 hours for full time) in the first 12 weeks following the birth, adoption, or foster placement of a child. Paid parenting leave will be paid on regularly scheduled pay dates.*

d. *Paid parenting leave shall run concurrently with leave under the FMLA. Any leave taken under this policy that falls under the definition of circumstances qualifying for leave due to the birth or adoption or foster placement of a child, will be counted toward the 12 weeks of available FMLA leave for a 12-month period. The employee must apply for and use Parenting Leave/FMLA.*

e. *If a holiday occurs while an employee is on parenting leave, such day will be coded to holiday pay and will not count towards the employee's parenting leave entitlement or FMLA hours. If the employee is on parenting leave/FMLA when the University authorizes paid administrative or emergency closure leave due to inclement weather and/or an office closure, that time will be recorded as parenting leave/FMLA. Administrative and emergency closure leave will not extend the parenting leave entitlement.*

E-3. If both parents are employees of the university and eligible for FMLA leave under Section L, the leave must be shared between parents and not exceed 480 hours (12 weeks) of total leave (paid or unpaid).

E-4. Employees can use parenting leave as outlined or choose to use a combination of accrued paid leave or unpaid leave if all other leave is exhausted (See Section N regarding use of unpaid leave). Any leave taken under sections E or L that falls under the definition of circumstances qualifying for leave due to the birth, adoption, or foster placement of a child is FMLA leave. See section L for FMLA criteria. Unpaid leave will be considered in accordance with FMLA and other applicable federal and state laws.

E-5. Parenting Leave shall be applied for through Benefit Services. When the need for Parenting Leave is foreseeable, an employee must request an application at least 30 days in advance of the need for leave. When events are not foreseeable, employees must provide as much notice as is possible. If an employee is eligible for FMLA leave under Section L, the Parenting Leave described in this section E is intended to encompass the university's obligation to provide Family Medical Leave under the federal Family Medical Leave Act. See Section L for return-to-work requirements following approved leave.

E-6. Health benefits continue during Parenting Leave on the same basis as for any similarly-situated employee who is actively at work, regardless of whether the employee is using other forms of accrued leave or taking leave unpaid. The employee's share of cost for health coverage is the amount that is typically payroll-deducted for the employee's own coverage and/or

coverage for the employee's dependents. The employee is responsible for payment of these amounts during leave. Payroll deductions will be continued for any portion of the leave that is paid. During any portion of leave when no pay is received, the employee must make arrangements to self-pay these amounts. Retirement plan contributions, leave accruals, and credit toward vesting are suspended during unpaid portions of Parenting Leave.

E-7. Upon return from Parenting Leave, employees will be assigned to their same or similar position with equivalent pay and status.

E-8. Leave may not be used for both foster care and adoption consecutively if foster placement leads to the adoption of the child.

E-9. Alternate or reduced work schedules are addressed in FSH 3710 L-13.b.

E-10. See FSH 3710 R-1 for exceptions to university leave policies.

F. MILITARY LEAVE. When an employee goes on military leave it is not considered a break in service. (Available to all UI employees as described in Section F)

F-1. Faculty and staff, regardless of whether or not they hold a fiscal-year or academic-year appointment are eligible for leave of up to 120 hours per calendar year for active duty or military training. Employees who are in board-appointed positions [FSH 3080] are eligible for full pay while on paid military leave. When called to active duty or training, the university will pay the difference between military pay received from the U.S. or State government, but cannot duplicate pay. The employee must provide documentation of military pay received during leave, within 90 days of return from leave or upon earlier job separation. The employee is required to repay to the university any amount which exceeds their regular base pay for the same period. Unpaid military leave may be requested if the employee knows their military pay will exceed their university pay. Annual and sick leave credit towards length of service for retirement plan, and other vesting will continue to accrue according to the applicable plan documents. Instead of taking military leave, an employee may request annual leave on the same basis as any other vacation or other time off and if approved, retain full military pay. [APM 55.09 and 55.38]

F-2. Any employee who is called to active duty and/or is required to serve more than 120 hours is eligible for up to five years of military leave. Eligibility for employee health coverage will continue at a minimum through the first 30 calendar days of service while on an approved military leave. The employee will be required to pay the employee share of the health care costs, as well as the costs for the employee's dependents.

F-3. An employee may choose to use annual leave and/or accrued compensatory time for military service and continue to receive pay and benefits at any time.

F-4. Military leave beyond the first 120 hours is generally granted without pay and benefits. Health care coverage will end for the individual who is called to active duty after the first 30 days of service. However, coverage for the employee's dependents may continue and are

subject to the applicable benefits based on the university's current Summary Plan Document at the time of reinstatement: contact Benefit Services.

F-5. An employee may also have the right to life insurance portability or conversion to an individual life insurance policy following termination of benefits in the group plan.

F-6. Upon reinstatement to active university employment, the employee's health plan will resume as if their employment had not been interrupted.

F-7. In accordance with state and federal law, an employee upon return will be reinstated to their former position or a comparable position without loss of seniority, status or pay rate provided the employee returns with an honorable discharge and within five years from departure date from the university.

a. In some situations, re-employment may not be possible, such as when there has been a significant change in circumstances, if re-employment would impose an undue hardship on the university or department, or if the person's employment was temporary in nature, such as positions that are grant-funded for a specific duration and/or temporary help (TH) positions.

1. If the returning employee's skills need upgrading to meet the requirements for a prior or promoted position, the university will make reasonable efforts to refresh or update these skills unless such efforts would create undue hardship for the university.

2. When an employee with a service-related disability is not qualified to perform the essential functions of the employee's job after the university has made reasonable efforts to accommodate the disability, the employee may be placed in another position of comparable pay, rank, and seniority.

b. Employees returning from military leave must provide the university with written timely notification of intent to return to their position. The university may require documentation that the person's application for reemployment is timely and that the person's discharge from uniformed services was under honorable conditions. University procedures will follow the applicable state and federal law, including but not limited to the Uniformed Services Employment & Reemployment Rights Act (USERRA), 38 U.S.C. 4301-4333, enforced by Department of Labor's Veterans' Employment & Training Services (VETS.)

F-8. Retirement benefit contributions are suspended while the employee is on unpaid military leave when the 120 hours per F-1 have been exceeded. Upon reinstatement to active university employment after military leave, reenrollment in the retirement plan will be accomplished in accordance with the plan documents.

a. Credited state service continues during military leave as though no break in employment has occurred.

b. The employee may elect to make up any employee contributions missed during an approved military leave. Such contributions must be paid into the plan within a period not to exceed three times the length of the military leave, up to a maximum of five years.

c. The university will contribute the regularly scheduled match contributions for any employee make-up payments made in connection with an approved military leave.

d. For purposes of determining eligibility for retiree health coverage, military leave will not count as a break in service provided that re-employment occurs within the parameters of this policy. Further, an employee will receive university service credit for purposes of determining eligibility under the Retiree Health Program [FSH 3730] during the 15 days of approved paid military leave; however, the employee will not receive service credit for purposes of determining eligibility under the Retiree Health Program [FSH 3730] for any unpaid military leave.

F-9. This policy is intended to comply with applicable state and federal laws, including the Uniformed Services Employment and Reemployment Rights Act (USERRA) of 1994. To the extent that any provision of this policy is ambiguous and/or contradicts the Act or any other law, the applicable law or Act will prevail.

G. LEAVE FOR COURT REQUIRED SERVICE AND VOTING. (Available to all UI employees as described in Section G)

G-1. Any employee who is summoned for jury duty or subpoenaed as a witness before a court of competent jurisdiction or as a witness in a proceeding before any federal or state administrative agency will be granted leave. Benefit-eligible employees will be granted leave with pay, except as provided below in G-2. Travel expenses in connection with this duty are not subject to reimbursement by the university. [RGP II.I.5.; APM 55.09]

G-2. An employee must request annual leave or personal leave without pay for the following:

a. appearing as a party in a non-job-related proceeding involving the employee;

b. appearing as an expert witness when the employee is compensated for such appearance; or

c. appearing as a plaintiff or complainant, or as counsel for a plaintiff or complainant, in a proceeding in which the Board of Regents or any of its institutions, agencies, school or office is a defendant or respondent. [RGP II.I.5.]

G-3. Polling places are typically open extended hours and absentee voting is widely available. However, employees who are unable to vote outside of scheduled hours will be allowed time off to vote. If available, an employee may use accrued annual leave, compensatory time or, if approved in advance, may be able to make up time lost to vote within the same work week [FSH 3460] through a flexible work schedule. Otherwise, time off will be approved, but unpaid.

H. LEAVE FOR CAMPAIGNING FOR OR SERVING IN PUBLIC OFFICE. Available to UI employees as described in Section H)

H-1. The president approves requests for leaves of absence for the purpose of campaigning for or serving in public office [RGP II. I.5.]. See FSH 6230 E for provisions concerning leave for campaigning and serving in public office.

H-2. It is the Board of Regent's intent that state salary not be duplicated to an employee serving as a member of the Idaho Legislature. Any leave for serving as a member of the Idaho State Legislature will be unpaid when the Legislature is in session [RGP II.I.5.]. Certain benefits may continue during the unpaid leave; however, the employee must pay the full cost of coverage.

I. ADMINISTRATIVE OR EMERGENCY LEAVE. (Available to all UI employees as described in Section I)

I-1. Administrative Leave is leave with pay and benefits. An employee will continue to receive pay and leave accruals in accordance with their regular rate and maintain eligibility for other benefit programs. (Academic transitional leave (J) is not considered administrative leave.)

I-2. At the discretion of the president or designee, an employee may be granted administrative leave when the state or the university will benefit as a result of such leave. [RGP II.I.5.; FSH 3470 B]

I-3. Examples of circumstances that may qualify an employee for administrative leave are volunteer fire fighters attending class off campus, official delegates to the annual general convention of Idaho Public Employees' Association, and members of state or local committees, such as the Human Rights Commission, attending official meetings.

I-4. With the approval of the president or designee, an administrator may also use administrative leave to remove an employee from the workplace (for example during an investigation or to mediate an employee relations issue), if approved in advance by Human Resources. The President's Office or Provost's Office, as appropriate must be notified.

I-5. In all cases involving administrative leave, payroll will coordinate with the department for the appropriate process based on the anticipated duration of the administrative leave. Hours attributed to administrative leave shall be coded as "Administrative Leave" on the time/leave record and in the payroll system.

I-6. In the absence of a written agreement to the contrary, an employee on administrative leave must be available for recall to work during regular university business hours in the event that the employee's services are required or they are otherwise requested to return to work.

I-7. Under certain circumstances, the university may require the use of accrued annual leave and/or compensatory time.

I-8. Emergency Leave with Pay. When the president or designee makes a decision to close, cancel classes, or postpone the opening the university, employees will be authorized Emergency Leave with pay (see APM95.21 and FSH3470). When approved, employees will enter hours as follows for emergency closure days:

Classified and PERSI-eligible TH will enter the hours they would have worked. Exempt and faculty enter leave if leave taken is more than four hours and will record leave only if they were out more than four hours.

a. (TH) Temporary Help (PERSI-eligible only) – enter hours regularly scheduled but not worked due to the closure under the Emergency Leave code, up to eight hours

b. Classified – enter hours not worked due to closure under the Emergency Leave code, up to eight hours

c. Exempt & Faculty – enter hours not worked, if over four, due to closure under the Emergency Leave code, up to eight hours.

J. ACADEMIC TRANSITIONAL LEAVE. (Available to all UI employees as described in Section J)

J-1. Academic transitional leave may apply when an academic administrator steps down from their administrative appointment and assumes a faculty appointment. The purpose of academic transitional leave is to prepare the employee for a new faculty appointment. Transition leave is not available in the event of transition from academic faculty to an administrative appointment. Academic transitional leave is granted at the discretion of the university, must be approved by the provost, and approved by the president or designee.

J-2. There is no accrual of annual leave during the period of academic transitional leave. All other benefits and leave accruals are provided on the same basis as afforded to similarly situated employees in a faculty job classification. Annual leave balances should be exhausted prior to a new academic faculty appointment. Leave balances that cannot be used will be carried forward. If not used, the balance of unused annual leave will be paid at the time of separation of all State of Idaho service. Carry forward of annual leave balances exceeding 80 hours must be approved in advance by Human Resources.

K. SHARED LEAVE. (Available to employees listed in A-6 (a) subject to specific eligibility criteria described in Section K)

K-1. University employees who earn annual leave may donate annual leave hours to shared leave. Shared leave may be donated to a shared leave pool or to the benefit of a specific eligible recipient. See FSH 3710 L-5 below and APM 55.07 for conversion of donated leave to shared leave.

K-2. Eligibility. Benefit-eligible employees, including academic year faculty who do not accrue annual leave, are eligible to receive shared leave. If an employee is only eligible for benefits under the Patient Protection and Affordable Care Act (PPACA) they do not qualify for shared leave.

a. Qualifying Events. If any benefit-eligible employee [A-6.a.] has a health condition [L-2.a.1] or has an immediate family member [A-3] who has such a condition and the employee is

required to take time away from work, and has exhausted all leave, the employee may apply for shared leave.

1. The health condition of the affected individual must be certified by a competent health care provider to be considered as acceptable evidence by the university, and qualify as a serious health condition as defined by family medical leave [L] to include a need resulting from human organ or bone marrow donation. This provision applies only to the acceptable medical conditions of family medical leave. An employee need not meet the service and other requirements of family medical leave to be considered as an absence eligible for shared leave.

2. An applicant for shared leave who has used their own annual leave for purposes other than attending to a medical condition that is known to create potential for an extraordinary need for leave typically is not eligible for leave from the shared leave pool. Under extraordinary circumstances, such an applicant may request an exception to receive shared leave from directed donations.

3. Shared leave that is donated from the shared leave pool is intended for use by employees who intend to return to work. An applicant who wishes to receive shared leave and otherwise meets the criteria of the program and does not intend to return to work may apply for shared leave; however, shared leave in this instance is available only from donations directed specifically to that one recipient.

b. Prerequisites. An employee must use all other available leave such as sick leave, annual leave, and compensatory time to qualify for shared leave. If an employee receives shared leave during the first year of their employment with the university, and does not return to active service for at least thirty days after completion of their leave, they may be expected to repay the compensation they received, unless this requirement is waived by the president or designee.

c. Disability Income. To be eligible for shared leave for the employee's own medical condition that is expected to last longer than thirty days, employees must first apply for wage replacement benefits that may be available through disability coverage. In cases of job-related injuries, employees must first apply for wage replacement through workers' compensation. Once such benefits begin eligibility for shared leave benefits end. However, an otherwise eligible employee may use shared leave while satisfying the waiting period or after exceeding maximum disability periods for income replacement programs. Shared leave cannot be claimed when time away will be paid through wage replacement programs such as disability and workers' compensation benefits.

K-3. Donating Annual Leave.

a. Employees who have an accrued annual leave balance may donate to shared leave regardless of their funding salary source. Donations may be made to the shared leave pool and accessed by any eligible recipient or donated directly to a specific shared leave recipient.

b. Leave donations made for a specific individual will be drawn from donors' accounts based on a first-received basis. The first donation request received by Benefit Services will

be processed before a second donation from other recipients or before hours are withdrawn from the shared leave pool. Donations will be drawn from the donor's annual leave account.

c. Leave donations may be made in any amount of not less than ½-hour (.50) increments.

d. Shared leave donations may not cause the donor's annual leave balance to fall below 40 hours at the time the donation is processed, unless the donor is terminating active employment from the university. Donors should be aware that any shared leave not used by the intended recipient will be returned to the Shared Leave Pool, not returned to the donor(s). Leave donors who desire to donate only as much leave as the intended recipient needs are encouraged to work with HR to make incremental donations to that person.

K-4. Shared Leave Benefits.

a. Maximum Benefit. The maximum shared leave benefit is limited to four (4) working weeks of leave within a rolling 12-month period. Shared leave hours granted will be prorated based on employee's FTE.

b. Recipients of shared leave from the shared leave pool will receive the benefit on a first-come, first-serve basis as the pool balance must not fall below zero dollars. If funds are unavailable from the shared leave pool, then the recipient would be required to solicit direct donations.

c. Shared leave requests are reviewed and granted by Benefit Services in accordance with this policy. Applicants awarded shared leave will be notified in writing; if the request is denied, the reason(s) for denial shall also be stated in writing. The requestor may appeal a denied request for shared leave. Appeals must be made in writing to Human Resources within 30 days from the date of denial and must reference the applicable sections of policy and reasons why there is disagreement. Human Resources will respond to appeals within 30 days.

K-5. Funding and Conversion.

a. Funding for a full year of base salary is provided for most positions. A department typically has received funding for the duration of the employee's full appointment. If an employee is absent without pay, the department would achieve salary savings as a result. The only exceptions would apply to those working from certain special funding sources or who hire a temporary replacement during the period of unpaid leave. Consequently, the department of the employee who will receive shared leave is responsible for funding the employee's pay during leave from shared leave donations.

b. Conversion for donations. Hours donated by an employee are calculated at the donor's hourly rate and converted to dollars that will be distributed to the recipient using the recipient's hourly rate. Direct donations donors should be aware that if the conversion value from donated hours is greater than the intended recipient uses, any unused dollars will go into the Shared Leave Pool.

L. FAMILY MEDICAL LEAVE. (Available to all UI employees subject to specific eligibility criteria described in Section L). Federal Family and Medical Leave Act 29 U.S.C 2601 and amendments will be followed when administering FMLA. Upon exhaustion of FMLA, when there is a continued need for leave for an employee's own serious health condition, federal and state guidance will be followed.

L-1. Family medical leave may be requested by an eligible employee for the following reasons:

a. the birth of a child of the employee and/or in order to care for such child;

b. the placement of a child with the employee for adoption or foster care;

c. to care for an immediate family member as defined in [A-3] of this policy with a serious health condition as defined in [L-5] of this policy;

d. because of the employee's own serious health condition [L-5]; or

e. to serve as a human organ or bone marrow donor.

The entitlement to leave under subparagraphs (a) and (b) of this section L-1 for a birth or placement of a child is encompassed in the Parenting Leave described in Section E, of this policy. Parenting Leave taken under Section E. is Family Medical Leave and shall be counted as Family Medical Leave.

L-2. Family medical leave and/or service member family medical leave is generally leave without pay. However, when the absence also qualifies for the use of sick leave, if available, employees must first use accrued sick leave. See Parenting Leave for wage replacement.

L-3. Eligibility. If the employee has been employed by the university for a minimum of 12 months and has worked at least 1250 hours during the previous 12 month period prior to the requested leave, the employee is eligible for family medical leave. This eligibility requirement applies to eligibility for Parenting Leave under Section E.

L-4. Length of Leave. A maximum of up to 12 weeks or a total of 480 hours of family medical leave may be granted to eligible full-time employees during a rolling 12 month period. Eligible part-time employees may be granted up to 12 working weeks of leave or a total number of hours consistent with their regular work schedule within a 12-week period. (i.e. 20 hours per week x 12 weeks = 240 hours). The period is measured from the date the employee last used/exhausted family medical leave or became employed by the university to the date leave is to begin. Family medical leave may be taken on a continuous, intermittent, or reduced-hour basis. See Section E for parenting leave requirements.

L-5. Definitions.

a. "Serious health condition" is defined as an illness, injury, impairment or physical or mental condition that involves any period of incapacity or treatment connected with in-patient care (i.e. overnight stay) in a hospital, hospice, or residential medical-care facility, and any period of

incapacity or subsequent treatment in connection with such in-patient care; continuing treatment by a health care provider, which includes any period of incapacity (i.e. inability to work, attend school, or perform other regular daily activities) due to a health condition (including treatment for or recovery from) lasting more than three consecutive days; and any subsequent treatment or period of incapacity relating to the same condition, that also includes:

1. treatment two or more times by or under the supervision of a health care provider; or one treatment by a health care provider with a continuing regimen of treatment; or

2. pregnancy or prenatal care. A visit to the health care provider is not necessary for each absence; or

3. chronic serious health condition, which continues over an extended period of time, requires periodic visits to a health care provider, and may involve occasional episodes of incapacity (e.g. asthma, diabetes). A visit to a health care provider is not necessary for each absence; or

4. permanent or long-term condition for which treatment may not be effective (e.g. Alzheimer's, a severe stroke, terminal cancer). Only supervision by a health care provider is required, rather than active treatment; or

5. absences to receive multiple treatments for restorative surgery or for a condition which would likely result in a period of incapacity of more than three days if not treated (e.g. chemotherapy or radiation treatments for cancer).

6. Conditions for which cosmetic treatments are administered (such as most treatments for acne or plastic surgery) are not serious health conditions unless inpatient hospital care is required or unless complications develop. Ordinarily, unless complications arise, the common cold, the flu, ear aches, upset stomach, minor ulcers, headaches other than migraine, routine dental or orthodontia problems, periodontal disease, etc., are examples of conditions that do not meet the definition of a serious health condition and do not qualify for FMLA leave. Restorative dental or plastic surgery after an injury or removal of cancerous growths are serious health conditions provided all the other conditions of this section are met. Mental illness or allergies may be serious health conditions, but only if all the conditions of this section are met.

L-6. Health benefits continue during family medical leave on the same basis as for any similarly situated employee who is actively at work, regardless of whether the employee is using other forms of compensation including accrued leave or taking leave unpaid. The employee's share of cost for health coverage is the amount that is typically payroll-deducted for the employee's own coverage and/or coverage for the employee's dependents. The employee is responsible for payment of these amounts during leave. Payroll deductions will be continued for any portion of the leave that is paid. During any portion of leave when no pay is received, the employee must make arrangements to self-pay these amounts. Retirement plan contributions, accruals for sick and annual leave and credit toward vesting are suspended during unpaid portions of family medical leave.

L-7. All qualified absences, including those due to a work-related injury, will be considered as family medical leave.

L-8. If there are reasonable circumstances to support that an employee's absence qualifies as family medical leave, the university has the right to classify such absence as family medical leave.

L-9. When the need for family medical leave is foreseeable, an employee must request an application for family medical leave at least 30 days in advance of the need for leave. Application assistance is available from Benefit Services. When events are not foreseeable, employees must provide as much notice as is possible. Application for family medical leave after a return from absence is not recommended; rights to preserved employment and benefits may be adversely affected. In any event, absent extraordinary circumstances, an employee may not claim an absence as a qualified family medical leave event unless done so within the first two days of return from an absence. See Parenting Leave Section E.

L-10. When leave is taken for personal illness or to care for an immediate family member with a serious health condition, leave may be continuous or intermittent and may include a reduction in hours worked. For intermittent leave, the employee must provide certification from the health care provider caring for the employee and/or family member stating the leave must be taken intermittently. Employees needing intermittent leave must attempt to schedule their leave so as not to disrupt university operations. The university reserves the right to assign an employee to an alternative position with equivalent pay and benefits that better accommodates the employee's intermittent or reduced leave schedule.

L-11. Employees on family medical leave are required to provide documentation to Benefit Services as requested, including intent to return to work. During leave, the university may require an employee to re-certify the medical condition that caused him/her to take leave. A return-to-work release from the health care provider is required before an employee absent due to their own serious health condition may return to work.

L-12. Family medical leave requests for medical treatment or care giving requires certification from the health care provider documenting medical necessity.

L-13. Family medical leave requests for parenting must be approved in advance and completed within 12 months of the birth, adoption, or foster care placement of a child. See Section E for Parenting Leave requirements. Shared leave (if granted) may be used for the disability period related to childbirth. See Section K for Shared Leave and Section E for Parenting Leave requirements.

L-14. Family medical leave taken by two university employees to care for a family member who has a serious health condition consists of a maximum 12 weeks of leave for each employee. See Section E for Parenting Leave requirements.

L-15. If the university obtains information from a credible source, such as the workers' compensation authority, disability carrier, or a medical practitioner, that alters, changes,

casts doubt, or fails to support continued leave or the leave application, the university has the right to:

a. revoke leave;

b. not grant leave;

c. require new evidence to support the leave request;

d. require the employee to return to work if the leave is not substantiated; and/or

e. when appropriate under applicable employee discipline policies [FSH 3910, 3920, and 3930], take disciplinary action, up to and including dismissal.

L-16. Upon return from family medical leave, employees will be assigned to their same or similar position with equivalent pay and status with or without reasonable accommodation, as appropriate, in accordance with the Americans with Disabilities Act. Job reassignment must be coordinated with Employment Services and approved by Human Resources. The university has no obligation to restore employment to temporary hourly (TH) or other employees if the employment term or project is over and the university would not otherwise have continued employment.

L-17. Family medical leave is not available for individuals who do not plan to return to work. An employee who applies for and is granted family medical leave and fails to return to work for at least 30 days upon the expiration of their family medical leave period may be obligated to repay the costs of health coverage and any portion of paid parenting leave provided by the university during any portion of family medical leave. If the university is notified that the employee does not intend to return to work, the family medical leave period will terminate immediately and the employee will be separated from employment on that date. Medical, dental and under some circumstances Health Care Spending Accounts may be continued through the Consolidated Omnibus Budget Reconciliation Act (COBRA). Options for life insurance portability or conversion may also be available. Job separation under these circumstances will result in a lump sum payment of annual leave and/or compensatory balances. In addition, the employee will no longer have a right to restoration to the same or equivalent position.

M. SERVICE MEMBER FAMILY AND MEDICAL LEAVE. The federal Family and Medical Leave Act (FMLA) now entitles eligible employees to take leave for covered family members' service in the Armed Forces (Service member Family and Medical Leave) in two instances. This section of the policy supplements the above family medical leave policy and provides general notice of employee rights to such leave. Except as stated below, an employee's rights and obligations to service member family and medical leave are governed by the general family medical leave policy.

M-1. Definitions: The following definitions are applicable to this section of the policy.

a. "Eligible employee" is a spouse, son, daughter, parent, or for purposes of caring for a family member, the next of kin of a covered family member.

b. "Next of kin" is the nearest blood relative of a family member who is in the Armed Forces.

c. "Covered family member" means any family member who is a member of the Armed Forces, including a member of the National Guard or Reserves, regardless of where stationed and regardless of combative activities.

d. A "covered veteran" is an individual who was a member of the armed forces (including a member of the National Guard or reserves) and was discharged or released under conditions other than dishonorable at any time during the 5-year period before the first date the eligible employee takes FMLA leave to care for the covered veteran.

1. An eligible employee must begin leave to care for a covered veteran within five years of the veteran's active duty service, but the "single 12-month period" may extend beyond the five-year period.

M-2. Leave Entitlement: Eligible employees are entitled to take service member family and medical leave for any one, or for a combination of the following reasons:

a. Any "qualifying exigency" (as defined by the Secretary of Labor) arising out of the fact that the spouse, or a son, daughter, or parent of the employee is on active duty or has been notified of an impending call or order to active duty in the Armed Forces in support of a "contingency operation," and/or

b. To care for a covered family member who has incurred an injury or illness in the line of duty while on active duty in the Armed Forces, or that existed before the beginning of the member's active duty and was aggravated by service in the line of duty on active duty in the armed forces, provided that such injury or illness may render the covered family member medically unfit to perform duties of the family member's office, grade, rank or rating.

c. In the case of a covered veteran, an injury or illness that was incurred by the member in the line of duty on active duty in the armed forces (or existed before the beginning of the member's active duty and was aggravated by service in the line of duty on active duty in the armed forces) and manifested itself before or after the member became a veteran and is:

1. A continuation of a serious injury or illness that was incurred or aggravated when the covered veteran was a member of the armed forces and rendered the service member unable to perform the duties of the service member's office, grade, rank, or rating; or

2. A physical or mental condition for which the covered veteran has received a U.S Department of Veterans Affairs Service-Related Disability (VASRD) rating of 50 percent or greater, and such VASRD rating is based, in whole or in part, on the condition precipitating the need for military caregiver leave; or

3. A physical or mental condition that substantially impairs the covered veteran's ability to secure or follow a substantially gainful occupation by reason of a disability or disabilities related to military service, or would do so absent treatment; or

4. An injury, including a psychological injury, on the basis of which the covered veteran has been enrolled in the U.S Department of Veteran's Affairs Program of Comprehensive Assistance for Family Caregivers.

M-3. Duration of service member family and medical leave:

a. When leave is due to a qualifying exigency: an eligible employee may take up to 12 work weeks of leave during any 12-month period.

b. When leave is to care for a covered family member: an eligible employee may take up to 26 workweeks of leave during a single 12-month period to care for the covered family member. Leave to care for a covered family member, when combined with other qualifying family medical leave may not exceed 26 weeks in a single 12-month period.

c. Concurrent leave: service member family and medical leave runs concurrent with other leave entitlements provided under federal, state and local law.

N. PERSONAL LEAVE. (Available to UI employees listed in A-6.a and A-6.b as described in Section N.)

N-1. Any employee not covered by another university leave type within this policy may request a personal leave of absence.

N-2. Personal leave is leave without pay and without benefits. However, the university may require the use of sick, annual or any other type of accrued leave if the absence qualifies and leave is available. Personal leave may be taken with pay and benefits when other paid leave such as annual leave is taken concurrently. In rare circumstances, leave may be approved without pay, with continued benefits, but only when approved as an exception and only when doing so meets the business needs of the university. Hiring units are responsible for funding the benefits under these circumstances. [APM 55.38]

N-3. Reasons for requesting a personal leave may include, but are not limited to, religious, personal, and educational matters or for extension of any leave when all other leaves have been exhausted.

N-4. All requests for personal leave must be made to the supervisor in writing. A leave of three working days or less can be approved by the supervisor and are recorded on the employee's time record as Leave Without Pay with Benefits. The president or designee (i.e., provost) must approve a personal leave which exceeds three working days. Personal leave is not guaranteed and is granted on a case-by-case basis, with the approval of the supervisor and the unit administrator, based on the business needs of the university.

N-5. The president or designee (i.e. provost) may grant personal leave without pay with or without benefits for a period of up to one calendar year, with extensions not to exceed a total of three successive calendar years [RGP II.I.5.]. Consideration is given to such requests on an individual basis in the light of the reason for which it is requested, whether it is leave with or without paid benefits and the effect that granting it will have on the employee's unit or program.

N-6. When a personal leave of absence is granted, the university assures reinstatement of the individual to a position of similar status and pay, but only to the extent that such position continues to exist and would have continued to exist had no leave been taken. Return to work in the same job within the same department is not promised.

N-7. During personal leave without pay an employee is not eligible for holiday pay, the accrual of sick or annual leave, or the use of medical appointment leave, and may not be granted any other type of leave of absence such as family medical or military leave until the employee has first returned to work under active status and otherwise qualifies for such leave.

N-8. An employee who has received approval from the president or designee for a personal leave without pay without benefits may not continue to contribute toward and receive the benefits of the institution's insurance and retirement programs, Employees should consult Benefits Services for more detailed information on how personal leave without pay will impact their benefits and their rights to continue coverage through COBRA and life insurance conversion or portability. [APM 55.09 and 55.38]

N-9. Employees who are granted a personal leave of absence without pay are responsible for making arrangements with Benefit Services, before the leave begins, for the continuation or discontinuation of benefits. Also, they should call Benefit Services on their return to active status to make sure that any benefits that had been discontinued are reinstated or to adjust for changes that occurred while they were on leave. [APM 55.38]

N-10. Personal leave is not intended as a vehicle to continue benefits for periods when employees are not working due to academic or seasonal work schedules or for a reduction in hours.

O. LEAVE FOR PROFESSIONAL IMPROVEMENT. (Available to faculty with instructor rank or above, exempt employees and classified staff as described in Section O.)

O-1. Leave for professional improvement is paid leave with benefits for the purpose of participating in professional development programs or experiences for an extended period of more than two weeks to attain or enhance a skill set that will result in a mutual benefit to the both the university and the employee.

O-2. Members of the faculty who hold the rank of instructor or above, exempt employees, and classified staff are encouraged to participate in programs of professional improvement. (Tenured faculty may also be eligible for sabbatical leave and should refer to FSH 3720.) Generally, on the recommendation of an applicant's administrative supervisor, and with the approval of the dean/director and the provost/vice president, professional improvement leave

may be granted under the following conditions (individual departments may have additional requirements and restrictions):

a. To participate in this plan, the faculty or staff member must have completed four years of service before the time the leave is to begin.

b. Generally, at least two years of service must intervene between a sabbatical leave and a leave for professional improvement or at least five years of service must intervene between a leave for professional improvement and a subsequent request for the same type of leave.

0-3. The employee requests professional improvement leave with pay by submitting a letter of application to the supervisor at least three months before the leave is to begin. The letter should address the professional development to be derived from the leave, what activities (i.e. research, writing, experience, etc.) will be involved to achieve the professional goals, the duration of the leave, the level of support requested, and the source of funds, if known.

0-4. Persons granted leave under this policy are expected either to return to the active service of the university for at least one academic or other full work year after completion of the leave, or are required to repay the money received from the university for the period of professional improvement leave granted.

0-5. The employee must submit a report to the supervisor, the dean/director, and the provost/president regarding his or her developmental experience upon return to active work status.

0-6. The employee may request approval to use accrued annual leave and to have an equal amount of administrative leave with pay granted to permit the employee's participation in a program of professional improvement.

P. EXCEPTIONS. Exceptions to these policies may be considered to the extent that such an exception is not contrary to state and federal laws, the Board of Regents policies and procedures, and are considered in the best interest of the university. The respective unit administrator, Human Resources, and the president or designee as required, can grant exceptions. A request for exception must be submitted and approved by the supervisor and forwarded to Human Resources for further consideration of all approvals.

Version History

Amended January 2020. Changes were made pursuant to FSH 1460 C-3 to comply with Idaho Code 59-1608 and 67-5343 and for clarification purposes.

Amended July 2017. Edits were made for clarification purposes and cleanup.

Amended July 2016. Many changes were put in place to comply with federal regulation changes on family medical leave.The section on Parenting Leave was revised, and changes were made to allow employees more flexibility in leave use.

Amended July 2015. Changes were made to comply with federal regulation changes on family medical leave, a new section on Parenting Leave was added, and to allow employees more flexibility in leave use.

Amended July 2011. Section R was removed and a new policy, FSH 3450, was created to address employment actions such as temporary furloughs.

Amended July 2010. Section R was added to address the Fiscal Year 2010 Furlough.

Amended July 2008. Changes were approved following work involving Faculty and Staff Affairs, General Counsel, and Human Resources and a new section M was added on servicemember family leave due to a federal law change.

Amended 2002. Extensive changes were made to subsection K that reflected Regent policy and current practice.

Adopted 1979.

55.09 - Employee Leave Benefits

Owner:

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Last updated: July 01, 2016

A. General. Leave benefits are available to UI employees, if eligible. Benefits for specific leave types available are fully described in FSH 3710.

B. Process. Annual (vacation) and compensatory leave is generally to be taken at times mutually agreeable between the employee and the supervisor. Other leave for personal needs and responsibilities of the employee outside the work environment require communication with, but not necessarily approval of, the employee's supervisor and Human Resources (HR), see FSH 3710 for the various leave types.

C. Procedure.

C-1. Annual (Vacation) Leave. Employees should submit written requests for annual leave, as far in advance as possible, to allow the unit sufficient time to cover the employee's absence. Longer advance notice is generally expected when leave is desired for more than a week. Annual leave is subject to the approval of the supervisor, such approval not to be unreasonably withheld. Employees whose salaries are funded by grants or contracts are expected to use all annual leave earned while paid from the grant or contract before expiration of the grant or contract or termination of employment. Employees are expected to take all annual leave prior to converting from fiscal year to academic year appointments. Board policy will be followed for any leave remaining following a transition to ineligible position[See RGP II.G.3. and FSH 3710]

C-2. Sick Leave. Sick leave (See FSH 3710 C

C-3. Parental Leave. [See FSH 3710].

C-4. Military Leave. The employee should present a copy of their military orders to their supervisor. The department timekeeper processes the request for military leave on an Electronic Personnel Action Form (EPAF) and provides a copy of the military orders to Benefit Services as documentation. The number of hours is entered as "MIL" on the timesheet. Military leave with pay is limited to 120 hours per calendar year [See FSH 3710]. If more than 120 hours per calendar year of military leave are needed, the employee may elect to use eligible paid time off and/or they will be placed on leave without pay for the duration of the military leave [See 55.38].

C-5. Leave for Jury or Other Legal Duty. The employee should inform their supervisor, and provide a copy of the legal document requiring the employee's presence for jury or other legal

Commented [BC(1]: Board Policy II.G.3.b

Pursuant to section 59-1606(3), Idaho Code, when a faculty member has accrued annual leave for service on a 12 month appointment, and subsequently such faculty member returns to a faculty position of less than 12 months where annual leave does not accrue, then the institution may pay the faculty member, as supplemental pay, the accrued annual leave balance.

duty to Payroll. Employees process a leave of absence with pay for the required period by entering the code "JRY" on the timesheet. The employee is entitled to keep fees and mileage reimbursement in addition to regular salary [See FSH 3710].

C-6. Leave for Campaigning for or Serving in Public Office. [See FSH 3710, 6620, and RGP II.P.]. If leave for campaigning or for serving in public office involves personal leave, see 55.38.

C-7. Sabbatical Leave. [See FSH 3720] If the sabbatical leave involves a reduction in appointment percentage (for example, a full year sabbatical at half pay), see 55.38.

C-8. Professional Improvement Leave. [See FSH 3710]

C-9. Personal Leave (leave without pay). See FSH 3710 N]. Personal Leave impacts other benefits [see 55.38], thus employees contemplating a period of Personal Leave need to contact Benefit Services (208) 885-3638.

C-10. Administrative Leave. [See FSH 3710]

C-11. Shared Leave. Forms for donating and receiving shared leave are available on the Benefits website, http://www.uidaho.edu/human-resources/benefits. See "forms" within the appropriate section under "time away from work." [Also see 55.07 and FSH 3710].

C-12. Family Medical Leave See FSH 3710

D. Information. Leave benefits are discussed at Employee Benefits Orientation [See 55.31]. For further information or questions on leave benefits, call Benefit Services at (208) 885-3638.

55.09 - Employee Leave Benefits

Owner:

- **Position:** Director of Human Resources
- **Name:** Brandi Terwilliger
- **Email:** brandit@uidaho.edu

Last updated: July 01, 2016

A. General. Leave benefits are available to UI employees, if eligible. Benefits for specific leave types available are fully described in FSH 3710.

B. Process. Annual (vacation) and compensatory leave is generally to be taken at times mutually agreeable between the employee and the supervisor. Other leave for personal needs and responsibilities of the employee outside the work environment require communication with, but not necessarily approval of, the employee's supervisor and Human Resources (HR), see FSH 3710 for the various leave types.

C. Procedure

C-1. Annual (Vacation) Leave. Employees should submit written requests for annual leave, as far in advance as possible, to allow the unit sufficient time to cover the employee's absence. Longer advance notice is generally expected when leave is desired for more than a week. Annual leave is subject to the approval of the supervisor, such approval not to be unreasonably withheld. Employees whose salaries are funded by grants or contracts are expected to use all annual leave earned while paid from the grant or contract before expiration of the grant or contract or termination of employment. Employees are expected to take all annual leave prior to converting from fiscal year to academic year appointments. Board policy will be followed for any leave remaining following a transition to ineligible position. [See RGP II.G.3. and FSH 3710]

C-2. Sick Leave. [See FSH 3710 C]

C-3. Parental Leave. [See FSH 3710]

C-4. Military Leave. The employee should present a copy of their military orders to their supervisor. The department timekeeper processes the request for military leave on an Electronic Personnel Action Form (EPAF) and provides a copy of the military orders to Benefit Services as documentation. The number of hours is entered as "MIL" on the timesheet. Military leave with pay is limited to 120 hours per calendar year [See FSH 3710]. If more than 120 hours per calendar year of military leave are needed, the employee may elect to use eligible paid time off and/or they will be placed on leave without pay for the duration of the military leave [See 55.38].

C-5. Leave for Jury or Other Legal Duty. The employee should inform their supervisor, and provide a copy of the legal document requiring the employee's presence for jury or other legal

duty to Payroll. Employees process a leave of absence with pay for the required period by entering the code "JRY" on the timesheet. The employee is entitled to keep fees and mileage reimbursement in addition to regular salary [See FSH 3710].

C-6. Leave for Campaigning for or Serving in Public Office. [See FSH 3710, 6620, and RGP II.P.] If leave for campaigning or for serving in public office involves personal leave, see 55.38.

C-7. Sabbatical Leave. [See FSH 3720] If the sabbatical leave involves a reduction in appointment percentage (for example, a full year sabbatical at half pay), see 55.38.

C-8. Professional Improvement Leave. [See FSH 3710]

C-9. Personal Leave (leave without pay). [See FSH 3710 N]. Personal Leave impacts other benefits [see 55.38], thus employees contemplating a period of Personal Leave need to contact Benefit Services (208) 885-3638.

C-10. Administrative Leave. [See FSH 3710]

C-11. Shared Leave. Forms for donating and receiving shared leave are available on the Benefits website, http://www.uidaho.edu/human-resources/benefits. See "forms" within the appropriate section under "time away from work." [Also see 55.07 and FSH 3710].

C-12. Family Medical Leave. [See FSH 3710]

D. Information. Leave benefits are discussed at Employee Benefits Orientation [See 55.31]. For further information or questions on leave benefits, call Benefit Services at (208) 885-3638.

UNIVERSITY OF IDAHO

SUBJECT

License Amendment with Sprint/T-Mobile to expand equipment installed on University of Idaho's "I" water tank.

REFERENCE

August 2016 Approved current license agreement.

APPLICABLE STATUTE, RULE, OR POLICY

Idaho State Board of Education Governing Policies & Procedures, Section V.I.5.b(1)

BACKGROUND/DISCUSSION

Since 2005, Sprint has been permitted, through a prior and current license agreement, to install and maintain transmission equipment on the legs of UI's "I" water tank. Sprint/T-Mobile is now requesting to increase the communication equipment attached to the legs of the tank. The existing agreement provides for an annual fee of $27,600. The proposed amendment would increase the number of antennae attached to the tower from three to six and would increase the annual fee to $55,200 with periodic escalations through the remainder of option terms. These renewal periods provide fee increases of 15% to UI for each of the remaining extensions. The amended license also provides additional rights to UI to order the temporary removal of equipment by Sprint in the event of UI planned maintenance or an emergency. Such removal and reinstallation shall be at Sprint's expense.

IMPACT

UI will receive a substantial increase in payment to expand the license agreement and the installations have been determined to not interfere with operations at this water storage facility or substantially increase its operational expenses.

ATTACHMENTS

Attachment 1 – Proposed License Amendment

STAFF COMMENTS AND RECOMMENDATIONS

This action complies with Board Policy which states leases to use real property under the control of an institution, school, or agency require prior Board approval if the term of the lease exceeds five years.

Staff recommends approval.

BOARD ACTION

I move to approve the request by the University of Idaho for authority to grant a five-year license to Sprint in substantial conformance to the form submitted to the Board in Attachment 1 and to authorize the University's Operations Officer for Finance and Administration to execute the amendment and related documents.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

FIRST AMENDMENT TO LICENSE AGREEMENT

This First Amendment to License Agreement (First Amendment) is made by and between the Board of Regents of the University of Idaho, a state educational institution and body politic and corporate, organized and existing under the Constitution and laws of the State of Idaho (Grantor), and SprintCom, Inc, a Kansas Corporation (Grantee). This First Amendment shall revise the License Agreement (License) between the parties for Grantor's real property located at 1000 Nez Perce Dr, Moscow ID 83844 ("Site") and signed by the Grantor on November 28, 2016 (License is attached and incorporated into this Amendment as Exhibit 1). First Amendment shall become effective upon date of Grantor's signature.

Now, THEREFORE, in consideration of the mutual promises contained herein, Grantor and Grantee agree as follows:

A. Exhibit A of License is hereby deleted and replaced with a "New Exhibit A" (which is hereby attached and incorporated into this First Amendment). All references in the License to "Exhibit A", shall hereby be deemed to refer to this New Exhibit A.

B. Section 4 of the License is hereby deleted and replaced with the following amended Section 4:

> "4. Fees and Expenses. Within sixty (60) calendar days following the Commencement Date and no later than September 30 of each subsequent year of the Term, Grantee shall pay to Grantor a use fee of Twenty- Four Thousand Dollars ($24,000.00) per year for the Initial Term, and then Twenty-Seven Thousand Six Hundred Dollars ($27,600.00) for the first year of the first Extension Term (which is the period from October 1, 2021, through September 30, 2022). After the first year of the first five-year Extension Term, Grantee shall pay to Grantor by no later than September 30, 2022, and on or before September 30 of each subsequent year an amount of Fifty-five Thousand Two Hundred Dollars ($55,200.00) for each of those four remaining years of that first five-year Extension Term. Grantee shall pay Sixty-three Thousand Four Hundred Eighty Dollars ($63,480.00) per year for each year of the second five-year Extension Term. Grantee shall pay Seventy-three Thousand Two Dollars ($73,002.00) per year for each year of the third and final five-year Extension Term. These amounts are referred to herein as the "Use Fee", which amount is inclusive of and shall cover electricity expenses typical for such installation and use. Use Fees for any fractional year shall be prorated. Use Fees, and/or any other charges or expenses owed by Grantee shall be payable to "Bursar, University of Idaho", and mailed to the attention of Real Estate Office, University of Idaho, 875 Perimeter Dr MS 3162, Moscow ID 83844-3162 or such other person as Grantor shall provide to Grantee by written notice. Failure to pay the Use Fee and/or any charges or expenses assessed or incurred hereunder on or before the due date shall constitute a default by Grantee, and, in addition to all other remedies of the Grantor, Grantee shall pay late charges equal to ten (10) percent of the amount past due plus simple interest on the amount due equal to one (1) percent per month until paid."

C. Section 5.h. of the License is hereby deleted and replaced with the following amended Section 5.h.:

"5.h. Grantee shall maintain Equipment in good working condition and shall do so without any damage to Grantor's Site. In the event of some act or omission by Grantee resulting in such damage, Grantee shall reimburse Grantor for any repairs necessary to restore Grantor's Site and personal property to its prior condition. When maintenance deemed necessary by Grantor to maintain the safety, appearance, or operation of Grantor's water storage tank or supporting infrastructure and grounds requires temporary removal of some or all of Grantee's Equipment, Grantor shall notify Grantee of Grantor's planned maintenance not less than sixty days prior to being initiated by Grantor. Upon such notice, and in coordination with Grantor or its contractors, Grantee shall perform, and pay all costs of, temporary removal and reinstallation. In the event of an emergency requiring immediate removal, Grantor shall be permitted to stop transmission and remove Equipment to the least extent necessary to address such emergency. As soon as reasonably practical after such emergency, Grantor shall notify Grantee of the event and coordinate a time for reinstallation performed by Grantee at Grantee's expense.

D. The second paragraph of Section 10 of the License is hereby deleted and replaced with the following second paragraph:

"Grantor shall be responsible only for the acts, omissions or negligence of Grantor and Grantor's employees and agents. Nothing in this License shall extend the tort responsibility or liability of Grantor or the State of Idaho beyond that authorized by law, including the Idaho Tort Claims Act, Idaho Code section 6-901, *et seq.*

E. All other provisions of the License are unchanged and shall remain in full force and effect for the Term.

IN WITNESS WHEREOF, the parties hereto have executed this First Amendment on the date(s) set forth below.

GRANTOR:	GRANTEE:
Board of Regents of the University of Idaho	SprintCom, Inc.
_____	_____
Lee Espey	Name:_____
Operations Officer, Finance and Administration	Title:_____
Date:_____	Date:_____

TMO Signatory Level: L06

CONSENT - BAHR

TAB 4 Page 3

ATTACHMENT 1

NEW Exhibit A

T-Mobile

ZONING JURISDICTION:

CITY OF MOSCOW

SITE ID: **SP01591A**

SITE NAME: **VANDALS - SP03UB188**

SITE LOCATION:
964 NEZ PERCE DR
MOSCOW, ID 83844

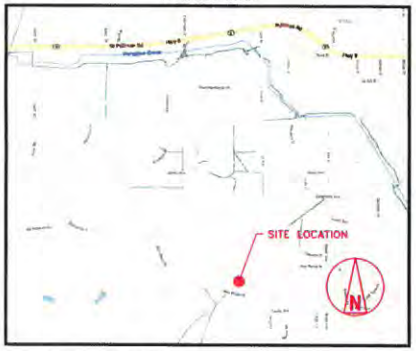
LEGAL DESCRIPTION:
TBD

UTILITY COMPANIES:

POWER:
COMPANY: AVISTA UTILITIES
CONTACT:
PHONE: (800) 227-9187
EMAIL:

BACKHAUL/AAV:
COMPANY:
CONTACT:
PHONE:
EMAIL:

VICINITY MAP



LOCATION MAP

DRIVING DIRECTIONS:

FROM LOCAL T-MOBILE OFFICE (601 W. 1ST AVENUE, SPOKANE, WA 99201)
1. HEAD WEST ON I-90 W
2. TAKE EXIT 279 FOR US-195 S TOWARD COLFAX/PULLMAN
3. CONTINUE ONTO US-195 S
4. TURN LEFT ONTO WA-270 E
5. TURN RIGHT ONTO N GRAND AVE
6. TURN LEFT ONTO WA-270 E/SE PARADISE ST
7. CONTINUE ONTO HWY 8/W PULLMAN RD
8. SLIGHT LEFT TO STAY ON PERIMETER DR
9. CONTINUE ONTO NEV PERCE DR
DESTINATION WILL BE ON THE LEFT

REVIEWERS SHALL CLEARLY PLACE INITIALS ADJACENT TO EACH REDLINE NOTE AS DRAWINGS ARE BEING REVIEWED

APPROVED BY:	DATE:	SIGNATURE:	APPROVED BY:	DATE:	SIGNATURE:
PROJECT MANAGER:			RF ENGINEER:		
SITE ACQUISITION:			OPERATIONS MANAGER:		
ZONING:			DEVELOPMENT MANAGER:		
CONSTRUCTION MANAGER:			REGULATORY:		
CONSTRUCTION MANAGER:					

811 Know what's BELOW. Call before you dig. www.call811.com

PROJECT CONTACT LIST:

APPLICANT:
T-MOBILE USA, INC.
601 W. 1ST AVENUE
SPOKANE, WA 99201

PROPERTY OWNER:
COMPANY: UNIVERSITY OF IDAHO
900 STADIUM WAY
MOSCOW, ID 83844

RF ENGINEER
T-MOBILE USA, INC.
CONTACT: DON BLENKER
EMAIL: Don.Blenker@T-Mobile.com

PROJECT A&E:
COMPANY: TAEC
CONTACT: JOEL HARTMAN, PE
PHONE: (801) 463-1020x2107
EMAIL: joel.hartman@taec.net

SITE ACQUISITION & PERMITTING:
COMPANY: TAEC
CONTACT: DAKOTA HAWKS
PHONE: (801) 651-4769
EMAIL: Dakota.hawks@taec.net

CONSTRUCTION MANAGER:
COMPANY: TAEC
CONTACT: ZACH ERICKSON
PHONE: (208) 660-8719
EMAIL: zachary.erickson@taec.net

PROJECT INFORMATION:

CODE INFORMATION:

ZONING CLASSIFICATION:	RP
BUILDING CODE:	IBC 2018
CONSTRUCTION TYPE:	IIB
OCCUPANCY:	U,S-2
JURISDICTION:	CITY OF MOSCOW
PROPOSED BUILDING USE:	UNMANNED TELECOM.

SITE LOCATION (NAD83):

LATITUDE:	**46° 43' 25.4604"N (46.723739°N)**
LONGITUDE:	**117° 0' 46.8678"W (117.013019°W)**
TOP OF STRUCTURE:	2815.00' AMSL 86.0' AGL
BASE OF STRUCTURE:	2729.00' AMSL 0.0' AGL

PROJECT LEASE AREA:
136 SQ. FT.

PARCEL NUMBER:
RPM00000183850

NEW IMPERVIOUS AREA:
0 SF

AREA OF PARCEL:
167.16329 ACRES

GENERAL INFORMATION:
PARKING REQUIREMENTS ARE UNCHANGED
TRAFFIC IS UNAFFECTED
SIGNAGE IS PROPOSED

DRAWING INDEX:

SH #	SHEET DESCRIPTION
T-1	TITLE SHEET
T-2	NOTES & LEGEND
A-1	SITE PLAN
A-2	ENLARGED SITE PLAN - EXISTING
A-2.1	ENLARGED SITE PLAN - FINAL
A-3	ANTENNA PLANS
A-3	EQUIPMENT PLANS
A-4	ELEVATIONS
A-5	ELEVATIONS
A-6	DETAILS
A-7	DETAILS
A-8	DETAILS
A-9	ANTENNA MOUNTING SPECIFICATIONS
A-10	HELIAX FIBER FEED PENDANT CONNECT
G-1	GROUNDING PLANS
G-2	GROUNDING DETAILS
RF-1	RF DETAILS
RF-2	RF DIAGRAM

PROJECT DESCRIPTION:

T-MOBILE PROPOSES (PER RFDS V1, 01-18-2022) TO MODIFY AN EXISTING UNMANNED TELECOMMUNICATIONS FACILITY WITH:

THE REMOVAL OF:
- (3) EXISTING SPRINT ANTENNAS
- (9) EXISTING RRUS AT ANTENNAS
- (2) EXISTING CABINETS
- (1) EXISTING PPC PANEL
- (1) EXISTING GEN PLUG
- (3) EXISTING ANTENNA CHAIN MOUNTS
- (1) EXISTING UTILITY PANEL
- (1) EXISTING TELCO CABINET
- (1) EXISTING SERVICE LIGHT
- (1) EXISTING H-FRAME
- (1) EXISTING METER

THE ADDITION OF:
- (3) NEW (FFVV-65C-R3-V1) ANTENNAS
- (3) NEW (AEHC) ANTENNAS
- (3) NEW AHLOA
- (3) NEW AHFIG
- (6) NEW COLLAR MOUNTS
- (12) NEW STAND OFF MOUNTS
- (9) NEW FIBER JUMPERS (15')
- (1) NEW FIBER JUMPERS (60')
- (6) NEW HCS 2.0 TRUNK (@200')
- (6) NEW HCS 2.0 PENDANT
- (6) NEW HCS 2.0 JUNCTION BOXES
- (2) NEW EQUIPMENT
- CABINETS (1-HPL3, 1-LB3)
- (8) NEW RECTIFIERS IN HPL3
- (1) NEW ROUTER IN NEW CABINET
- (2) NEW ASIB IN NEW CABINET
- (2) NEW ASIL IN NEW CABINET
- (1) NEW FSMF IN NEW CABINET
- (3) NEW ABIA IN NEW CABINET
- (2) NEW ABIO IN NEW CABINET
- (3) NEW ABIC IN NEW CABINET
- (2) NEW AMIA IN NEW CABINET
- (1) NEW PPC PANEL W/ CAMLOCK
- (1) NEW LEC CUBE
- (3) NEW SERVICE LIGHTS
- (1) NEW H-FRAME
- (1) NEW METER

PLANS PREPARED FOR:
T-Mobile
601 W. 1ST AVENUE
SPOKANE, WA 99201

PLANS PREPARED BY:
Technology Associates
SPOKANE MARKET OFFICE
9725 3RD AVENUE NE, STE. 410
SEATTLE, WA 98115

MLA PARTNER:

JURISDICTION APPROVAL SEAL:

ENGINEERING SEAL:
PROFESSIONAL ENGINEER LICENSED 17165 STATE OF IDAHO JOEL R. HARTMAN
04.20.22

DRAWING NOTICE:
THESE DOCUMENTS ARE CONFIDENTIAL AND ARE THE SOLE PROPERTY OF T-MOBILE AND MAY NOT BE REPRODUCED, DISSEMINATED OR REDISTRIBUTED WITHOUT THE EXPRESS WRITTEN CONSENT OF T-MOBILE

REVISIONS:

DESCRIPTION	DATE	BY	REV
ISSUED FOR 90% SPRINT RETAIN CD	01/25/2022	ES	A
100%/SITE RETAIN CD'S & CONSENTS	04/13/2022	VT	B

SITE NAME:
VANDALS - SP03UB188

SITE NUMBER:
SP01591A

SITE ADDRESS:
964 NEZ PERCE DR
MOSCOW, ID 83844

SHEET DESCRIPTION:
TITLE SHEET

SHEET NUMBER:
T-1

CONSENT - BAHR

TAB 4 Page 4

ATTACHMENT 1

GENERAL NOTES

1. THIS FACILITY IS EXEMPT FROM HANDICAP REQUIREMENTS PER 2018 INTERNATIONAL BUILDING CODE SECTION 1103.2.9. THIS FACILITY IS NON-OCCUPIABLE SPACE AND ENTERED ONLY BY SERVICE PERSONNEL. THIS SPACE IS NOT FOR HUMAN OCCUPANCY.
2. THE CONTRACTOR SHALL VERIFY ALL EXISTING CONDITIONS AND DIMENSIONS PRIOR TO SUBMITTING HIS BID. ANY DISCREPANCIES, CONFLICTS OR OMISSIONS SHALL BE REPORTED TO THE ENGINEER PRIOR TO SUBMITTING BIDS, AND PROCEEDING WITH ANY WORK.
3. THE CONTRACTOR SHALL NOTIFY ENGINEER OF ANY ERRORS, OMISSIONS, OR DISCREPANCIES AS THEY MAY BE DISCOVERED IN THE PLANS, SPECIFICATIONS, & NOTES PRIOR TO STARTING CONSTRUCTION, INCLUDING BUT NOT LIMITED BY DEMOLITION. THE CONTRACTOR SHALL BE RESPONSIBLE FOR CORRECTING ANY ERRORS, OMISSION, OR INCONSISTENCY AFTER THE START OF CONSTRUCTION WHICH HAS NOT BEEN BROUGHT TO THE ATTENTION OF THE ARCHITECT/ENGINEER AND SHALL INCUR ANY EXPENSES TO RECTIFY THE SITUATION. THE METHOD OF CORRECTION SHALL BE APPROVED BY THE ARCHITECT OR THE ENGINEER RESPONSIBLE OF THE PROJECT.
4. PRIOR TO STARTING CONSTRUCTION, THE CONTRACTOR HAS THE RESPONSIBILITY TO LOCATE ALL EXISTING UTILITIES, WHETHER OR NOT SHOWN ON THE PLANS, AND TO PROTECT THEM FROM DAMAGE. THE CONTRACTOR OR SUBCONTRACTOR SHALL BEAR THE EXPENSE OF REPAIRING OR REPLACING ANY DAMAGE TO THE UTILITIES CAUSED DURING THE EXECUTION OF THE WORK. CONTACT USA DIG ALERT @ 800-227-2600.
5. PRIOR TO STARTING CONSTRUCTION, THE CONTRACTOR SHALL PROTECT ALL AREAS FROM DAMAGE WHICH MAY OCCUR DURING CONSTRUCTION. ANY DAMAGE TO PROPOSED OR EXISTING SURFACES, STRUCTURES OR EQUIPMENT SHALL BE IMMEDIATELY REPAIRED OR REPLACED TO THE SATISFACTION OF THE PROPERTY OWNER. THE CONTRACTOR SHALL BEAR THE EXPENSE OF REPAIRING OR REPLACING ANY DAMAGED AREAS.
6. A COPY OF THE APPROVED PLANS SHALL BE KEPT IN A PLACE SPECIFIED BY THE GOVERNING AGENCY, AND BY LAW SHALL BE AVAILABLE FOR INSPECTION AT ALL TIMES. IT IS THE CONTRACTOR'S RESPONSIBILITY TO ENSURE ALL CONSTRUCTION SETS REFLECT THE SAME INFORMATION AS THE APPROVED PLANS. THE CONTRACTOR SHALL ALSO MAINTAIN ONE SET OF PLANS AT THE SITE FOR THE PURPOSE OF DOCUMENTING ALL AS-BUILT CHANGES, REVISIONS, ADDENDA, OR CHANGE ORDERS. THE CONTRACTOR SHALL FORWARD THE AS-BUILT-MARKED DRAWINGS TO THE ARCHITECT OR THE ENGINEER RESPONSIBLE OF THE PROJECT AT THE CONCLUSION OF THE PROJECT.
7. THE CONTRACTOR SHALL BE RESPONSIBLE FOR THE COMPLETE SECURITY OF THE SITE WHILE THE WORK IS IN PROGRESS UNTIL THE JOB IS COMPLETE.
8. THE CONTRACTOR IS RESPONSIBLE TO PROVIDE TEMPORARY POWER, WATER, AND TOILET FACILITIES AS REQUIRED BY THE PROPERTY OWNER OR GOVERNING AGENCY.
9. ALL CONSTRUCTION THROUGH THE PROJECT SHALL CONFORM TO THE LATEST I.B.C. AND ALL OTHER GOVERNING CODES, INCLUDING THE THE MOST RESTRICTIVE CODE SHALL GOVERN.
10. THE CONTRACTOR AND SUBCONTRACTOR SHALL COMPLY WITH ALL LOCAL AND STATE REGULATIONS INCLUDING ALL OSHA REQUIREMENTS.
11. WHEN REQUIRED STORAGE OF MATERIALS OCCURS, THEY SHALL BE EVENLY DISTRIBUTED OVER THE FLOOR OR ROOF SO AS NOT TO EXCEED THE DESIGNED LIVE LOADS FOR THE STRUCTURE. TEMPORARY SHORING OR BRACING SHALL BE PROVIDED WHERE THE STRUCTURE OR SOIL HAS NOT ATTAINED THE DESIGN STRENGTH FOR THE CONDITIONS PRESENT.
12. THE CONTRACTOR SHALL SUPERVISE AND COORDINATE ALL WORK, USING HIS PROFESSIONAL KNOWLEDGE AND SKILLS. HE IS SOLELY RESPONSIBLE FOR ALL CONSTRUCTION MEANS, METHODS, TECHNIQUES, PROCEDURES AND SEQUENCING AND COORDINATING ALL PORTIONS OF THE WORK UNDER THE PROJECT.
13. THE CONTRACTOR SHALL BE RESPONSIBLE TO OBTAIN AND PAY FOR ALL PERMITS, LICENSES AND INSPECTIONS WITH RESPECT TO THE WORK TO COMPLETE THE PROJECT. BUILDING PERMIT APPLICATIONS SHALL BE FILED BY THE OWNER OR AUTHORIZED AGENT. CONTRACTOR SHALL OBTAIN THE PERMIT AND MAKE FINAL PAYMENT OF SAID DOCUMENT.
14. ALL DIMENSIONS TAKE PRECEDENCE OVER SCALE. DRAWINGS ARE NOT TO BE SCALED UNDER ANY CIRCUMSTANCES.
15. THE CONTRACTOR SHALL PROVIDE ALL NECESSARY BLOCKING, BACKING, FRAMING, HANGERS OR SUPPORTS FOR INSTALLATION OF ITEMS INDICATED ON THE DRAWINGS.
16. THE CONTRACTOR SHALL PROVIDE THE FIRE MARSHALL OR U.L. APPROVED MATERIALS TO FILL/SEAL PENETRATIONS THROUGH FIRE RATED ASSEMBLIES.
17. PROPOSED CONSTRUCTION ADDED TO EXISTING CONSTRUCTION SHALL BE MATCHED IN FORM, TEXTURE, MATERIAL AND PAINT COLOR EXCEPT AS NOTED IN THE PLANS.
18. THE CONTRACTOR IS TO PROVIDE PORTABLE FIRE EXTINGUISHERS HAVING A MINIMUM 2A:10-B:C RATING WITHIN 75FT. OF TRAVEL TO ALL PORTIONS OF THE CONSTRUCTION AREA. (2018 INTERNATIONAL BUILDING CODE 906.1.1 AND SECTION 906.3.1)
19. MATERIALS TESTING SHALL BE TO THE LATEST STANDARDS AVAILABLE AS REQUIRED BY THE LOCAL GOVERNING AGENCY RESPONSIBLE FOR APPROVING THE RESULTS.
20. ALL GENERAL NOTES AND STANDARD DETAILS ARE THE MINIMUM REQUIREMENTS TO BE USED IN CONDITIONS WHICH ARE NOT SPECIFICALLY SHOWN OTHERWISE.
21. ALL DEBRIS AND REFUSE IS TO BE REMOVED FROM THE PROJECT. PREMISES SHALL BE LEFT IN A CLEAN BROOM FINISHED CONDITION AT ALL TIMES.
22. BUILDING INSPECTORS AND/OR OTHER BUILDING OFFICIALS ARE TO BE NOTIFIED PRIOR TO ANY GRADING AND CONSTRUCTION EFFORT AS MANDATED BY THE GOVERNING AGENCY.
23. ALL SYMBOLS AND ABBREVIATIONS ARE CONSIDERED CONSTRUCTION INDUSTRY STANDARDS. IF A CONTRACTOR HAS A QUESTION REGARDING THEIR EXACT MEANING THE ARCHITECT OR THE ENGINEER RESPONSIBLE OF THE PROJECT SHALL BE NOTIFIED FOR CLARIFICATIONS.
24. SITE CONTRACTOR TO CALL DIG ALERT (1-800-227-2600) TO LOCATE ANY AND ALL UNDERGROUND UTILITIES PRIOR TO ANY EXCAVATION.
25. ALL FACILITIES TO BE INSTALLED ARE UNMANNED. NO (E) PARKING SPACES WILL BE USED OR REMOVED BY THIS PROJECT.
26. PRIOR TO THE ISSUANCE OF ANY CONSTRUCTION PERMITS, THE APPLICANT SHALL INCORPORATE ANY CONSTRUCTION BEST MANAGEMENT PRACTICES NECESSARY TO COMPLY WITH THE CITY'S MUNICIPAL CODES INTO THE CONSTRUCTION PLANS OR SPECIFICATIONS.
27. PRIOR TO THE ISSUANCE OF ANY CONSTRUCTION PERMITS, THE APPLICANT SHALL SUBMIT A WATER POLLUTION CONTROL PLAN (WPCP). THE WPCP SHALL BE PREPARED IN ACCORDANCE WITH THE GUIDELINES IN APPENDIX E OF THE CITY'S STORM WATER STANDARDS.
28. THIS PROJECT PROPOSES NO DEVELOPMENT IMPROVEMENTS OUTSIDE THE EXISTING BUILDING FOOTPRINT FOR THIS DISCRETIONARY REVIEW AND THEREFORE DOES NOT REQUIRE ANY PERMANENT STORM WATER BEST MANAGEMENT PRACTICES.
29. THIS PROJECT PROPOSES NO WORK WITHIN THE PUBLIC RIGHT-OF-WAY.

STORM WATER QUALITY NOTES CONSTRUCTION BMPS:

THIS PROJECT SHALL COMPLY WITH ALL REQUIREMENTS OF THE STATE PERMIT.

NOTES 1-8 BELOW REPRESENT KEY MINIMUM REQUIREMENTS FOR CONSTRUCTION BMPS.

1. SUFFICIENT BMPS MUST BE INSTALLED TO PREVENT SILT, MUD OR OTHER CONSTRUCTION DEBRIS FROM BEING TRACKED INTO THE ADJACENT STREET(S) OR STORM WATER CONVEYANCE SYSTEMS DUE TO CONSTRUCTION VEHICLES OR ANY OTHER CONSTRUCTION ACTIVITY. THE CONTRACTOR SHALL BE RESPONSIBLE FOR CLEANING ANY SUCH DEBRIS THAT MAY BE IN THE STREET AT THE END OF EACH WORK DAY OR AFTER A STORM EVENT THAT CAUSES A BREECH IN THE INSTALLED CONSTRUCTION BMPS.
2. ALL STOCK PILES OF UN-COMPACTED SOIL AND/OR BUILDING MATERIALS THAT ARE INTENDED TO BE LEFT UNPROTECTED FOR A PERIOD GREATER THAN SEVEN CALENDAR DAYS ARE TO BE PROVIDED WITH EROSION AND SEDIMENT CONTROLS. SUCH SOIL MUST BE PROTECTED EACH DAY WHEN THE PROBABILITY OF RAIN IS 40% OR GREATER.
3. A CONCRETE WASHOUT SHALL BE PROVIDED ON ALL PROJECTS WHICH PROPOSE THE CONSTRUCTION OF ANY CONCRETE IMPROVEMENTS THAT ARE TO BE POURED IN PLACE ON THE SITE.
4. ALL EROSION/SEDIMENT CONTROL DEVICES SHALL BE MAINTAINED IN WORKING ORDER AT ALL TIMES.
5. ALL SLOPES THAT ARE CREATED OR DISTURBED BY CONSTRUCTION ACTIVITY MUST BE PROTECTED AGAINST EROSION AND SEDIMENT TRANSPORT AT ALL TIMES.
6. THE STORAGE OF ALL CONSTRUCTION MATERIALS AND EQUIPMENT MUST BE PROTECTED AGAINST ANY POTENTIAL RELEASE OF POLLUTANTS INTO THE ENVIRONMENT.

GENERAL FIRE NOTES:

1. BUILDINGS UNDERGOING CONSTRUCTION, ALTERATION, OR DEMOLITION SHALL BE IN ACCORDANCE WITH 2018 INTERNATIONAL BUILDING CODE AND ALL GOVERNING CODES.
2. ADDRESS SHALL BE PROVIDED FOR ALL PROPOSED AND EXISTING BUILDINGS IN A POSITION AS TO BE PLAINLY VISIBLE AND LEGIBLE FROM THE STREET OR ROAD FRONTING THE PROPERTY (2018 INTERNATIONAL BUILDING CODE 501.2).
3. DECORATIVE MATERIALS SHALL BE MAINTAINED IN A FLAME-RETARDANT CONDITION (2018 INTERNATIONAL BUILDING CODE 806.1).
4. PORTABLE FIRE EXTINGUISHERS: AT LEAST ONE FIRE EXTINGUISHER WITH A MINIMUM RATING OF 2-A:10B:C SHALL BE PROVIDED WITHIN 75 FEET MAXIMUM TRAVEL DISTANCE FOR EACH 6,000 SQUARE FEET OR PORTION THEREOF ON EACH FLOOR (2018 INTERNATIONAL BUILDING CODE 906.1.1 AND SECTION 906.3.1)

GENERAL NOTES | 4

ABBREVIATIONS

ABBREVIATION	DEFINITION	ABBREVIATION	DEFINITION	ABBREVIATION	DEFINITION
A.B.	ANCHOR BOLT	FAB	FABRICATION(OR)	PWR	POWER (CABINET)
ABV.	ABOVE	F.F.	FINISH FLOOR	QTY.	QUANTITY
ACCA.	ANTENNA CABLE COVER ASSEMBLY	F.G.	FINISH GRADE	RAD (R)	RADIUS
ADD'L.	ADDITIONAL	FIN.	FINISHED	REF.	REFERENCE
A.F.F.	ABOVE FINISHED FLOOR	FLR.	FLOOR	REINF.	REINFORCEMENT(ING)
A.F.G.	ABOVE FINISHED GRADE	FDN.	FOUNDATION	REQ'D.	REQUIRED
ALUM.	ALUMINUM	F.O.C.	FACE OF CONCRETE	RGS.	RIGID GALVANIZED STEEL
ALT.	ALTERNATE	F.O.M.	FACE OF MASONRY	RRU.	RADIO REMOTE UNIT
ANT.	ANTENNA	F.O.S.	FACE OF STUD	SCH.	SCHEDULE
APPRX.	APPROXIMATE(LY)	F.O.W.	FACE OF WALL	SHT.	SHEET
ARCH.	ARCHITECTURAL	F.S.	FINISH SURFACE	SIM.	SIMILAR
AWG.	AMERICAN WIRE GAUGE	FT. (')	FOOT(FEET)	SPEC.	SPECIFICATION(S)
BLDG.	BUILDING	FTG.	FOOTING	SQ.	SQUARE
BLK.	BLOCK	G.	GROWTH (CABINET)	S.S.	STAINLESS STEEL
BLKG.	BLOCKING	GA.	GAUGE	STD.	STANDARD
BM.	BEAM	GI.	GALVANIZED(I)	STL.	STEEL
B.N.	BOUNDARY NAILING	G.F.I.	GROUND FAULT CIRCUIT INTERRUPTER	STRUC.	STRUCTURAL
BTCW.	BARE TINNED COPPER WIRE	GLB (GLU-LAM)	GLUE LAMINATED BEAM	TEMP.	TEMPORARY
B.O.F.	BOTTOM OF FOOTING	GPS	GLOBAL POSITIONING SYSTEM	THK.	THICKNESS)
BU.	BACKUP CABINET	GRND.	GROUND	TMA	TOWER MOUNTED AMPLIFIER
CAB.	CABINET	HDR.	HEADER	T.N.	TOE NAIL
CANT.	CANTILEVER(ED)	HGR.	HANGER	T.O.A.	TOP OF ANTENNA
C.I.P.	CAST IN PLACE	HT.	HEIGHT	T.O.C.	TOP OF CURB
CLG.	CEILING	IGB	ISOLATED COPPER GROUND BUS	T.O.F.	TOP OF FOUNDATION
CLR.	CLEAR	IN (")	INCH(ES)	T.O.P.	TOP OF PLATE (PARAPET)
COL.	COLUMN	INT.	INTERIOR	T.O.S.	TOP OF STEEL
CONC.	CONCRETE	LB (#)	POUND(S)	T.O.W.	TOP OF WALL
CONN.	CONNECTION(OR)	L.B.	LAG BOLTS	TYP.	TYPICAL
CONST.	CONSTRUCTION	L.F.	LINEAR FEET (FOOT)	U.G.	UNDER GROUND
CONT.	CONTINUOUS	L.	LONG(ITUDINAL)	U.L.	UNDERWRITERS LABORATORY
d	PENNY (NAILS)	MAS.	MASONRY	U.N.O.	UNLESS NOTED OTHERWISE
DBL.	DOUBLE	MAX.	MAXIMUM	V.I.F.	VERIFY IN FIELD
DEPT.	DEPARTMENT	M.B.	MACHINE BOLT	W.	WIDE/WIDTH
D.F.	DOUGLAS FIR	MECH.	MECHANICAL	W/	WITH
DIA.	DIAMETER	MFR.	MANUFACTURER	WD.	WOOD
DIAG.	DIAGONAL	MIN.	MINIMUM	W.P.	WEATHERPROOF
DIM.	DIMENSION	MISC.	MISCELLANEOUS	WT.	WEIGHT
DWG.	DRAWING(S)	MTL.	METAL	℄	CENTERLINE
DWL.	DOWEL(S)	(N)	NEW	℄	PLATE
EA.	EACH	NO (#)	NUMBER		
EL.	ELEVATION	N.T.S.	NOT TO SCALE		
ELEC.	ELECTRICAL	O.C.	ON CENTER		
ELEV.	ELEVATOR	OPNG.	OPENING		
EMT.	ELECTRICAL METALLIC TUBING	PVC.	PRECAST CONCRETE		
E.N.	EDGE NAIL	PCS.	PERSONAL COMMUNICATION SERVICES		
ENG.	ENGINEER	PLY.	PLYWOOD		
EQ.	EQUAL	PPC.	POWER PROTECTION CABINET		
EXP.	EXPANSION	PRC.	PRIMARY RADIO CABINET		
EXIST (E)	EXISTING	P.S.F.	POUNDS PER SQUARE FOOT		
EXT.	EXTERIOR	P.S.I.	POUNDS PER SQUARE INCH		
		P.T.	PRESSURE TREATED		

ABBREVIATIONS | 1

NEW ANTENNA
EXISTING ANTENNA
GROUND ROD
GROUND BUS BAR
MECHANICAL GRND. CONN.
CADWELD
GROUND ACCESS WELL
ELECTRIC BOX
TELEPHONE BOX
LIGHT POLE
FND. MONUMENT
SPOT ELEVATION
SET POINT
REVISION
CENTERLINE
PROPERTY/LEASE LINE
MATCH LINE
WORK POINT
G — GROUND CONDUCTOR
T — TELEPHONE CONDUIT
E — ELECTRICAL CONDUIT (POWER)

GRID REFERENCE
DETAIL REFERENCE
ELEVATION REFERENCE
SECTION REFERENCE
GROUT OR PLASTER
(E) BRICK
(E) MASONRY
CONCRETE
EARTH
GRAVEL
PLYWOOD
SAND
WOOD CONT.
WOOD BLOCKING
STEEL
T/E — OVERHEAD SERVICE CONDUCTORS
A — COAXIAL CABLE
F — FIBER
P/F — POWER AND FIBER
X — CHAIN LINK FENCING
WOOD FENCE
OHP — OVERHEAD POWER LINE
UGP — BURIED POWER LINE
OHT — OVERHEAD TELEPHONE LINE
UG/T — BURIED TELEPHONE LINE
W — W — BURIED WATER LINE
SS — BURIED SANITARY SEWER
SD — BURIED STORM DRAIN

LEGEND | 3

NOT USED | 2

LANDLORD SIGNATURE

PLANS PREPARED FOR:

T-Mobile

801 W. 1ST AVENUE
SPOKANE, WA 99201

PLANS PREPARED BY:

Technology Associates

SPOKANE MARKET OFFICE:
9725 3RD AVENUE NE, STE 410
SEATTLE, WA 98115

MLA PARTNER:

JURISDICTION APPROVAL SEAL:

ENGINEERING SEAL:

PROFESSIONAL ENGINEER LICENSED 17165 STATE OF IDAHO JOEL R. HARTMAN
04.20.22

DRAWING NOTICE:

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REVISIONS:

DESCRIPTION	DATE	BY	REV
ISSUED FOR FINAL SIGNATURE (CD)	03/29/2022	JL	A
100% PLANS FOR PLANNING COMMISSION	04/13/2022	MT	B

SITE NAME:
VANDALS - SP03UB188

SITE NUMBER:
SP01591A

SITE ADDRESS:
964 NEZ PERCE DR
MOSCOW, ID 83844

SHEET DESCRIPTION:
NOTES & LEGEND

SHEET NUMBER:
T-2

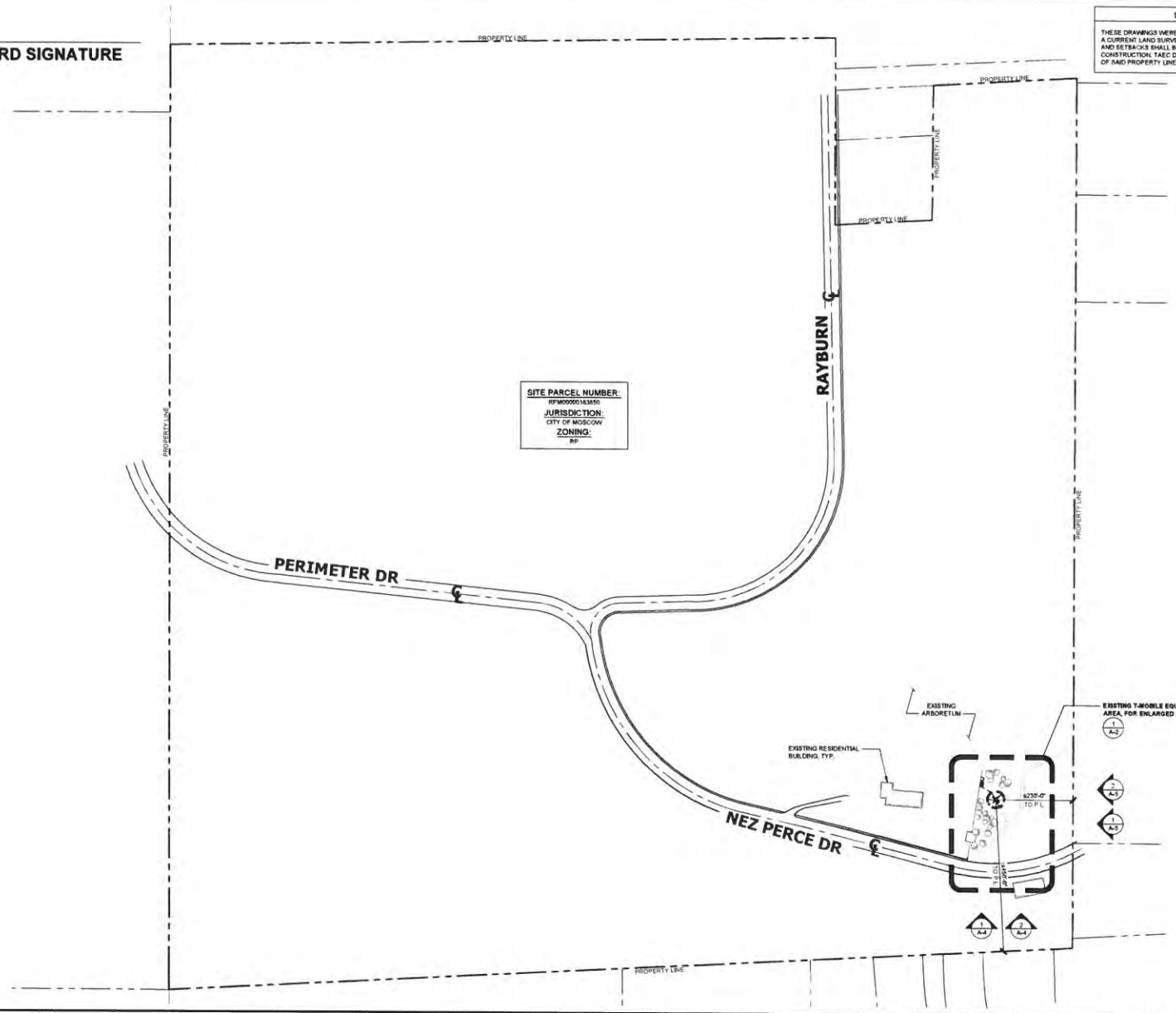
22" x 34" SCALE RATIO IS NOT VALID FOR REDUCED OR ENLARGED SHEET SIZES

CONSENT - BAHR

TAB 4 Page 5

ATTACHMENT 1

LANDLORD SIGNATURE



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SITE PLAN

140' 0 70' 140'

SCALE: 1" = 140'-0" (24x36)
(OR) 1/2" = 140'-0" (11x17)

1

PLANS PREPARED FOR:

T-Mobile

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SPOKANE, WA 99201

PLANS PREPARED BY:

Technology Associates

SPOKANE MARKET OFFICE
9725 3RD AVENUE NE, STE. 410
SEATTLE, WA 98115

MLA PARTNER:

JURISDICTION APPROVAL SEAL:

ENGINEERING SEAL:

PROFESSIONAL ENGINEER
LICENSED
17165
STATE OF IDAHO
JOEL R. HARTMAN
04.20.22

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REVISIONS:

DESCRIPTION	DATE	BY	REV
ISSUED FOR 90% SPRINT RETAIN CD	01/05/2022	EL	A
100%/SPT. RETAIN CD/LL COMMENTS	04/13/2022	VF	0

SITE NAME:
VANDALS - SP03UB188

SITE NUMBER:
SP01591A

SITE ADDRESS:
964 NEZ PERCE DR
MOSCOW, ID 83844

SHEET DESCRIPTION:
SITE PLAN

SHEET NUMBER:
A-1

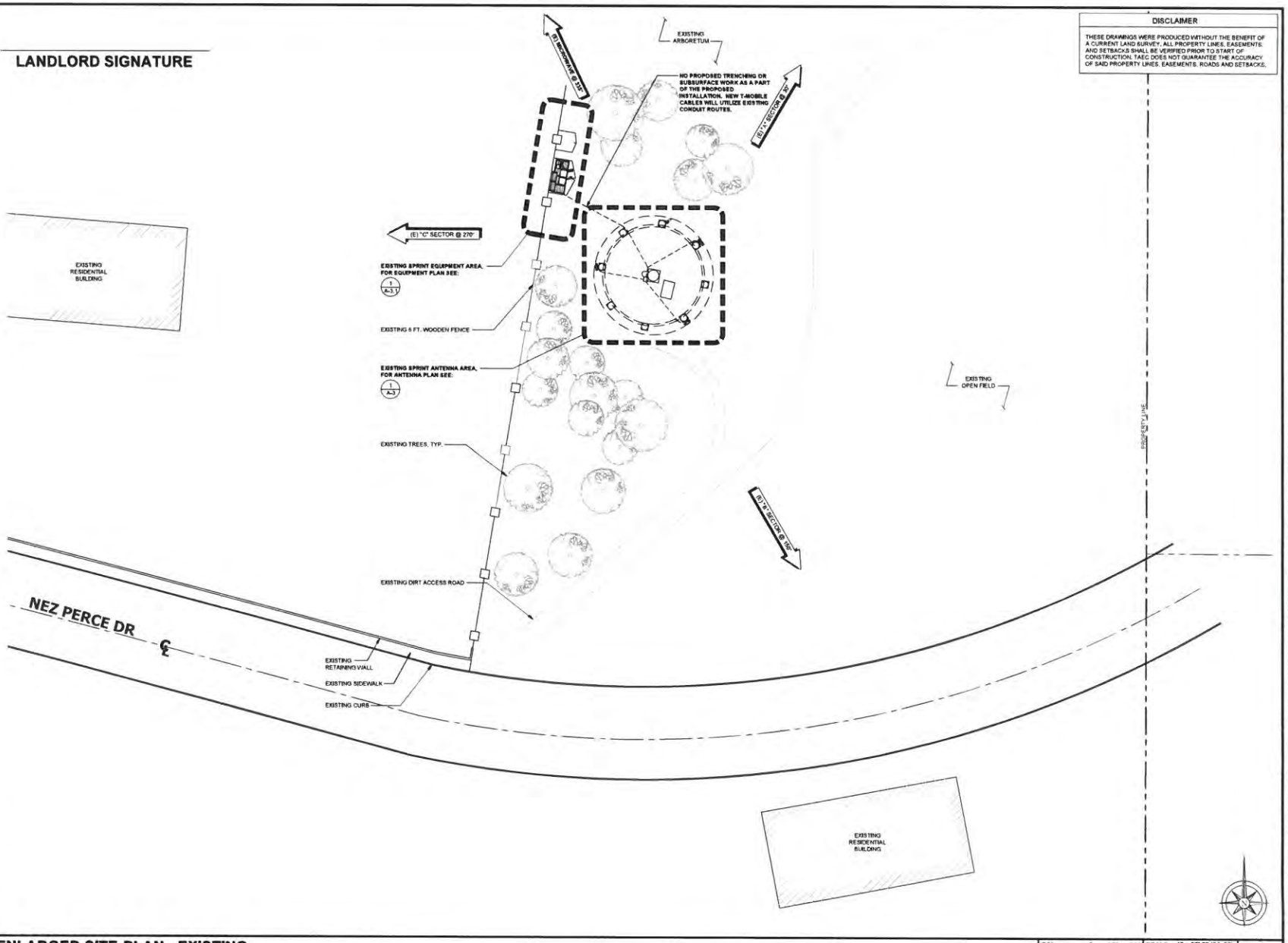
IF 24"x 36", SCALE RATIO IS NOT VALID FOR REDUCED OR ENLARGED SHEET SIZES

CONSENT - BAHR

TAB 4 Page 6

ATTACHMENT 1

LANDLORD SIGNATURE



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ENLARGED SITE PLAN - EXISTING

20' 0 10' 20' SCALE: 1" = 20'-0" (24x36) (OR) 1/2" = 20'-0" (11x17)

1

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T-Mobile

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SPOKANE, WA 99201

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Technology Associates

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SEATTLE, WA 98115

MLA PARTNER:

JURISDICTION APPROVAL SEAL:

ENGINEERING SEAL:

PROFESSIONAL ENGINEER LICENSED 17165 STATE OF IDAHO JOEL R. HARTMAN
04.20.22

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REVISIONS

DESCRIPTION	DATE	BY	REV
ISSUED FOR 90% SPRINT RETAIN CD	01/25/2022	EL	A
100% SPT RETAIN CDS, COMMENTS	04/12/2022	VF	0

SITE NAME:

VANDALS - SP03UB188

SITE NUMBER:

SP01591A

SITE ADDRESS:

964 NEZ PERCE DR
MOSCOW, ID 83844

SHEET DESCRIPTION:

ENLARGED SITE PLAN - EXISTING

SHEET NUMBER:

A-2

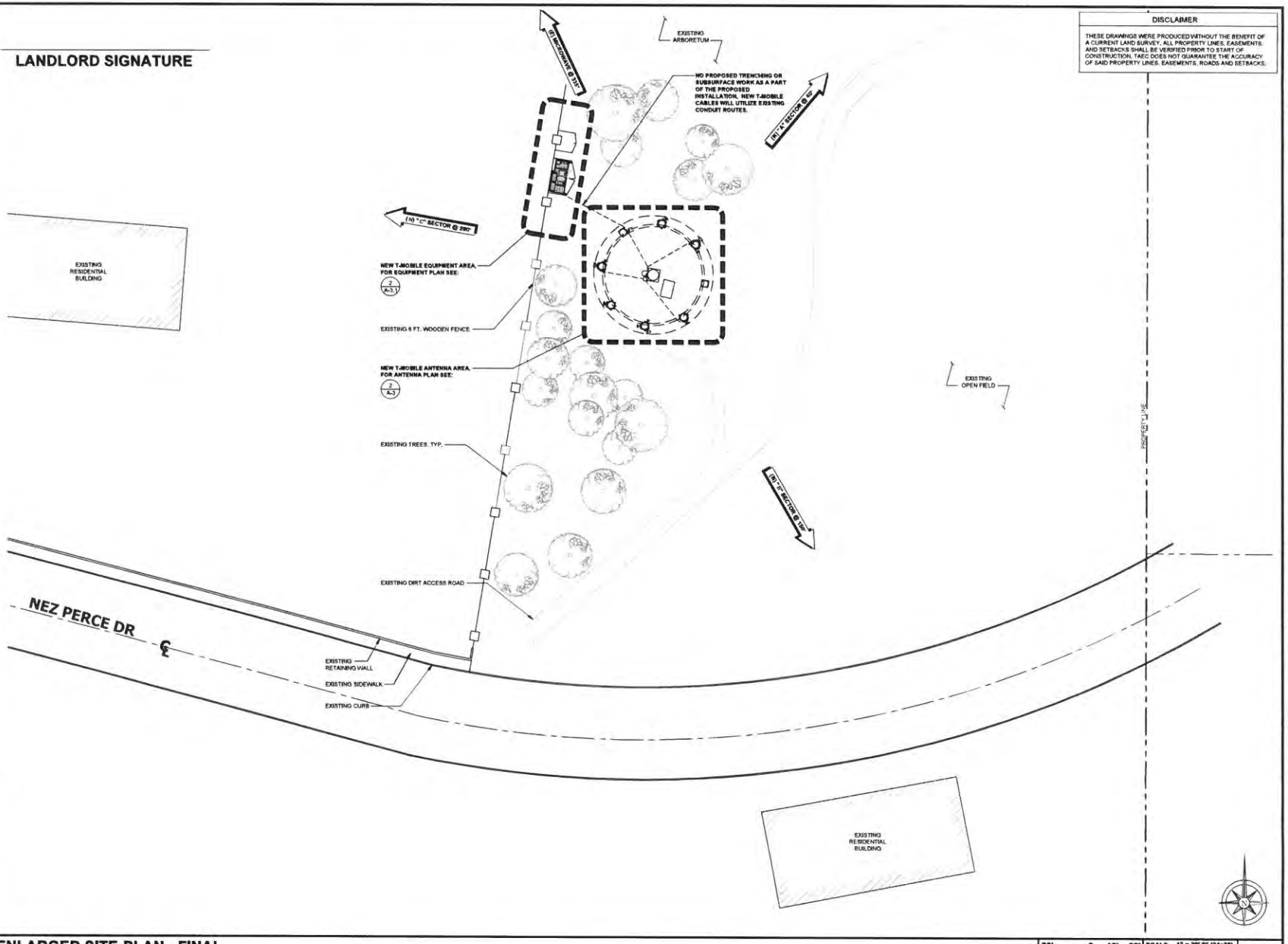
ANSI B 24" X 36" - SCALE RATIO IS NOT VALID FOR REDUCED OR ENLARGED SHEET SIZES

CONSENT - BAHR

TAB 4 Page 7

ATTACHMENT 1

LANDLORD SIGNATURE



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ENLARGED SITE PLAN - FINAL

20' 0 10' 20' SCALE: 1" = 20'-0" (24x36) (OR) 1/2" = 20'-0" (11x17) 1

PLANS PREPARED FOR:

T-Mobile

801 W. 1ST AVENUE
SPOKANE, WA 99201

PLANS PREPARED BY:

Technology Associates

SPOKANE MARKET OFFICE
9725 3RD AVENUE NE, STE. 410
SEATTLE, WA 98115

MLA PARTNER:

JURISDICTION APPROVAL SEAL:

ENGINEERING SEAL:

PROFESSIONAL ENGINEER LICENSED 17165 STATE OF IDAHO JOEL R. HARTMAN
04.20.22

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REVISIONS:

DESCRIPTION	DATE	BY	REV
ISSUED FOR 90% SPRINT RETAIN CD	01/25/2022	EE	A
100% SPRINT RETAIN CD'S/L COMMENTS	04/12/2022	VT	B

SITE NAME:
VANDALS - SP03UB188

SITE NUMBER:
SP01591A

SITE ADDRESS:
964 NEZ PERCE DR
MOSCOW, ID 83844

SHEET DESCRIPTION:
ENLARGED SITE PLAN - FINAL

SHEET NUMBER:
A-2.1

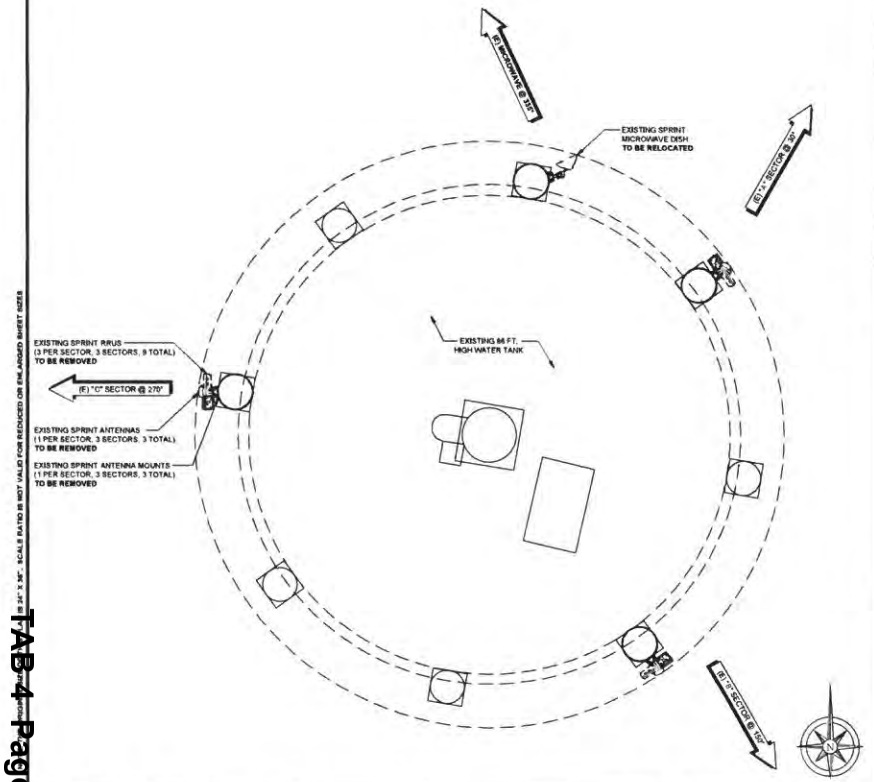
IF NOT 24" x 36", SCALE RATIO IS NOT VALID FOR REDUCED OR ENLARGED SHEET SIZES

CONSENT - BAHR

TAB 4 Page 8

ATTACHMENT 1

LANDLORD SIGNATURE



ANTENNA PLAN (EXISTING)

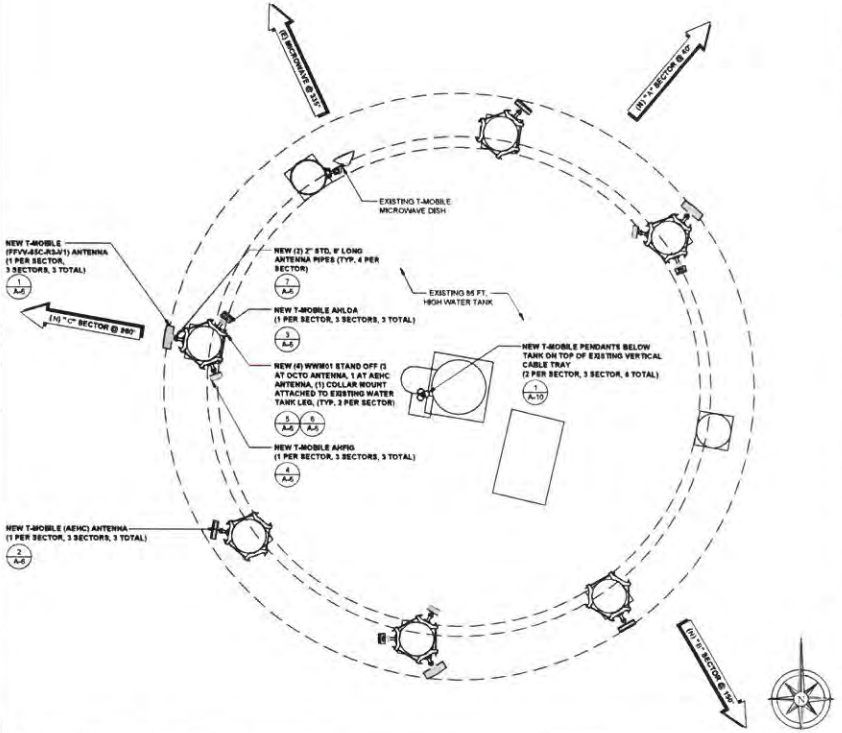
0 1.5' 3' 5' SCALE: 3/16" = 1'-0" (24x36) (OR) 3/32" = 1'-0" (11x17)

1

TOWER: FINAL EQUIPMENT INVENTORY

SCOPE OF WORK	QUANTITY	TECHNOLOGY	MANUFACTURER	MODEL	DIMENSIONS (LxWxD)	WEIGHT (LBS)
REMOVE EXISTING	(3)	ANTENNA	-	-	-	-
REMOVE EXISTING	(9)	RRU	-	-	-	-
ADD NEW	(3)	ANTENNA	COMMSCOPE	FFVV-65C-R3-V1	95" x 25.2" x 8.3"	127.6
ADD NEW	(3)	ANTENNA	NOKIA	AEHC	38.2" x 21.5" x 5.9"	108.0
ADD NEW	(3)	RRU	NOKIA	AHLOA	23.05" x 12.13" x 7.44"	83.78
ADD NEW	(3)	RRU	NOKIA	AHFIG	27.6" x 5.8" x 13.4"	79.4
ADD NEW	(6)	PENDANT	COMMSCOPE	PENDANT BREAKOUT	6.7" x 16.9" x 4.7"	0.979 LB/FT
ADD NEW	(6)	ANTENNA MOUNT	VALMONT SITEPRO 1	(LWHW) COLLAR MOUNT	95" x 25.2" x 8.3"	127.6
ADD NEW	(12)	ANTENNA MOUNT	VALMONT SITEPRO 1	(WWM01) STAND OFF	12" STAND OFF	-
ADD NEW	(12)	ANTENNA PIPE	VALMONT SITEPRO 1	P3H8	3-1/2" x 96"	48

NOTE:
1. ANTENNA CLEARANCE AND MOUNTING TO BE FIELD VERIFIED PRIOR TO CONSTRUCTION WITH FINAL ANTENNA SPECIFICATIONS, MOUNTING HARDWARE, AND RF DESIGN.
2. REFER TO FINAL CONFIGURATION ANTENNA SCHEDULE ON SHEET RF-1.
3. ALL NEW T-MOBILE ANTENNA EQUIPMENT, MOUNTS, AND CABLING TO BE PAINTED TO MATCH EXISTING WATER TANK.



ANTENNA PLAN (FINAL)

0 1.5' 3' 5' SCALE: 3/16" = 1'-0" (24x36) (OR) 3/32" = 1'-0" (11x17)

2

PLANS PREPARED FOR:

T-Mobile

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SPOKANE, WA 99201

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Technology Associates

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SEATTLE, WA 98115

MLA PARTNER:

JURISDICTION APPROVAL SEAL:

ENGINEERING SEAL:

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04.20.22

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REVISIONS:

DESCRIPTION	DATE	BY	REV
ISSUED FOR 90% REPORT RETAINED	01/05/2022	EJ	A
100% RPT RETAIN COLL COMMENTS	04/12/2022	VT	0

SITE NAME:

VANDALS - SP03UB188

SITE NUMBER:

SP01591A

SITE ADDRESS:

964 NEZ PERCE DR
MOSCOW, ID 83844

SHEET DESCRIPTION:

ANTENNA PLANS

SHEET NUMBER:

A-3

IF 24" X 36", SCALE RATIO IS NOT VALID FOR REDUCED OR ENLARGED SHEET SIZES

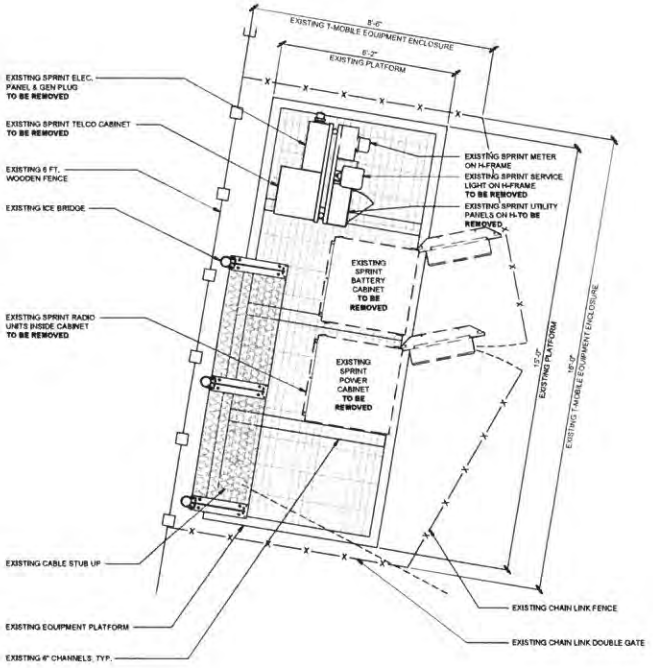
CONSENT - BAHR

TAB 4 Page 9

LANDLORD SIGNATURE

GROUND: FINAL EQUIPMENT INVENTORY

SCOPE OF WORK	QUANTITY	TECHNOLOGY	MANUFACTURER	EQUIPMENT MODEL	DIMENSIONS (LxWxD)	WEIGHT (LBS)	CABINET TYPE (LOCATION OF EQUIPMENT)	CABINET QUANTITY
REMOVE EXISTING	(1)	CABINET	-	POWER CABINET	-	-	-	-
REMOVE EXISTING	(1)	CABINET	-	BATTERY CABINET	-	-	-	-
REMOVE EXISTING	(1)	UTILITY PANEL	-	ELEC. PANEL & GEN PLUG	-	-	-	-

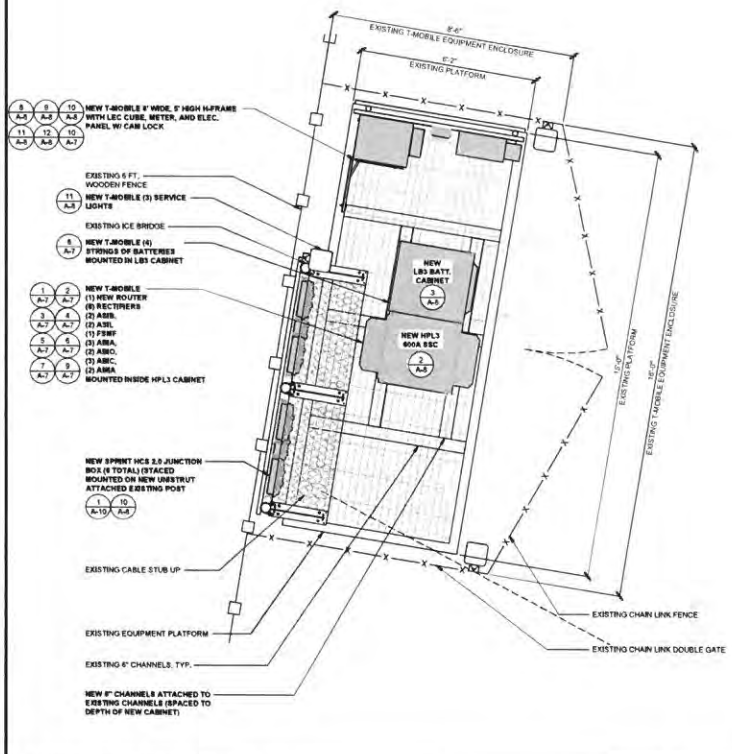


EQUIPMENT PLAN (EXISTING)

0 6" 1' 2' SCALE: 1/2" = 1'-0" (24x36) (OR) 1/4" = 1'-0" (11x17) 1

GROUND: FINAL EQUIPMENT INVENTORY

SCOPE OF WORK	QUANTITY	TECHNOLOGY	MANUFACTURER	EQUIPMENT MODEL	DIMENSIONS (LxWxD)	WEIGHT (LBS)	CABINET TYPE (LOCATION OF EQUIPMENT)	CABINET QUANTITY
ADD NEW	(1)	CABINET	PURCELL	HPL3 600A LARGE SSC	30.0" x 48.0" x 72.0"	430	ON PLATFORM	-
ADD NEW	(1)	CABINET	PURCELL	HPL3 LB3 BATTERY	60.4" x 30" x 33.8"	350	ON PLATFORM	-
ADD NEW	(1)	ROUTER	NOKIA	7250 IXR-e V2	1.75" x 17.25" x 10.9"	8.5	HPL3 LARGE SSC	(1)
ADD NEW	(2)	BASEBAND	NOKIA	ASIB	1.8" x 8.6" x 14.8"	5.51	HPL3 LARGE SSC	(1)
ADD NEW	(2)	BASEBAND	NOKIA	ASIL	-	-	HPL3 LARGE SSC	(1)
ADD NEW	(1)	BASEBAND	NOKIA	FSMF	5.3" x 11.76" x 16.6"	41.8	HPL3 LARGE SSC	(1)
ADD NEW	(3)	BASEBAND	NOKIA	AIRA	14.2" x 8.6" x 1.1"	4.41	HPL3 LARGE SSC	(1)
ADD NEW	(2)	BASEBAND	NOKIA	AIRO	0.98" x 8.62" x 14.33"	5.84	HPL3 LARGE SSC	(1)
ADD NEW	(3)	BASEBAND	NOKIA	AIRC	0.98" x 8.62" x 14.33"	5.84	HPL3 LARGE SSC	(1)
ADD NEW	(2)	BASEBAND	NOKIA	AIRA	5.1" x 15.7" x 17.6"	11.2	HPL3 LARGE SSC	(1)
ADD NEW	(6)	JUNCTION BOX	COMMSCOPE	FE-16149-OVP-B12	9.6" x 16.6" x 14.6"	18.21	ON UNISTRUT	-
ADD NEW	(1)	PPC/DISCONNECT	INTERSECT	AA-G-1220042-3R-CL-L/R	-	-	ON H-FRAME	-
ADD NEW	(1)	CABLOCK	PANTROL	PANLOC LITE	10.5" x 8.0" x 8.25"	-	ON H-FRAME	-



EQUIPMENT PLAN (FINAL)

0 6" 1' 2' SCALE: 1/2" = 1'-0" (24x36) (OR) 1/4" = 1'-0" (11x17) 2

PLANS PREPARED FOR:

T-Mobile

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PLANS PREPARED BY:

Technology Associates

SPOKANE MARKET OFFICE
9725 3RD AVENUE NE, STE. 410
SEATTLE, WA 98115

MLA PARTNER:

JURISDICTION APPROVAL SEAL:

ENGINEERING SEAL:

PROFESSIONAL ENGINEER LICENSED 17165 STATE OF IDAHO JOEL R. HARTMAN

04.20.22

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REVISIONS:

DESCRIPTION	DATE	BY	REV
ISSUED FOR 90% SPRINT RETAIN CD	01/25/2022	CL	A
UPDATES PER RETAIN CD'S, COMMENTS	04/12/2022	VT	B

SITE NAME:

VANDALS - SP03UB188

SITE NUMBER:

SP01591A

SITE ADDRESS:

964 NEZ PERCE DR
MOSCOW, ID 83844

SHEET DESCRIPTION:

EQUIPMENT PLANS

SHEET NUMBER:

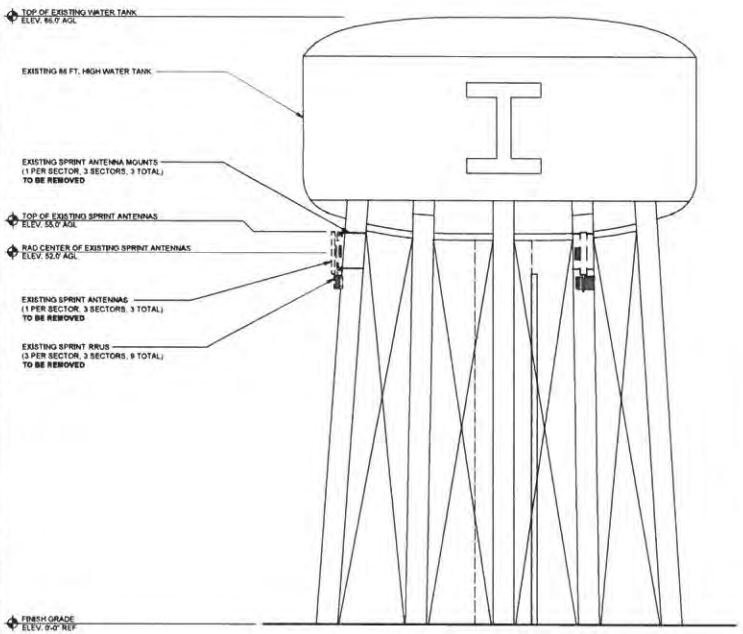
A-3.1

ATTACHMENT 1

THIS DRAWING IS 24" X 36". SCALE DATED IS NOT VALID FOR REDUCED OR ENLARGED SHEET SIZES

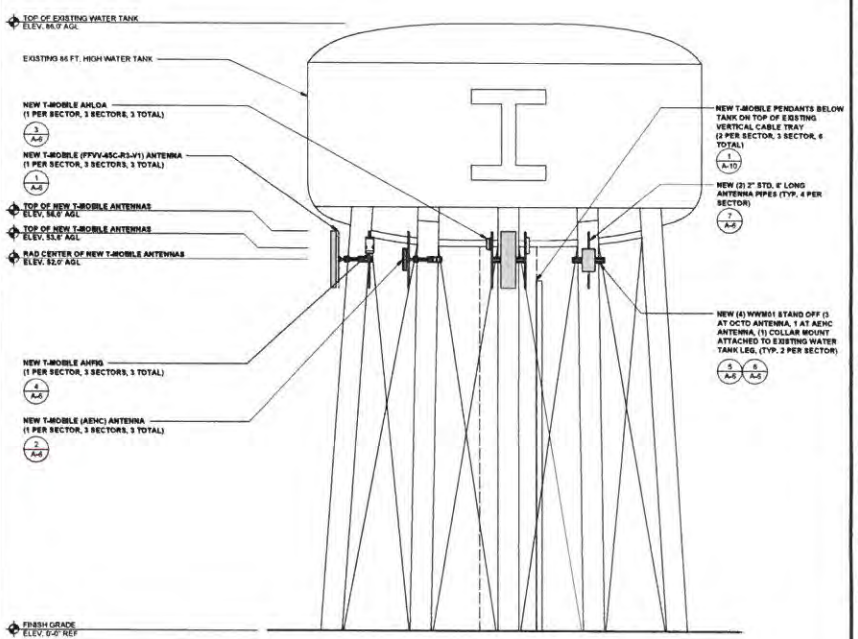
DISCLAIMER:

1. TOP OF EXISTING WATER TANK & RAD CENTER OF ANTENNAS IS BASED ON AS-BUILTS DATED 09/20/2017.
2. IF SAFETY LINE IS OBSTRUCTED, SITE MAY REQUIRE MAN LIFT OR CRANE.
3. ALL NEW T-MOBILE ANTENNA EQUIPMENT, MOUNTS, AND CABLING TO BE PAINTED TO MATCH EXISTING WATER TANK.



SOUTH ELEVATION (EXISTING) — SCALE: 1/8" = 1'-0" (24x36) (OR) 1/16" = 1'-0" (11x17) — 1

LANDLORD SIGNATURE



SOUTH ELEVATION (FINAL) — SCALE: 1/8" = 1'-0" (24x36) (OR) 1/16" = 1'-0" (11x17) — 2

PLANS PREPARED FOR:

T Mobile
601 W. 1ST AVENUE
SPOKANE, WA 99201

PLANS PREPARED BY:

Technology Associates
SPOKANE MARKET OFFICE
9725 3RD AVENUE NE, STE. 410
SEATTLE, WA 98115

MLA PARTNER:

JURISDICTION APPROVAL SEAL:

ENGINEERING SEAL:

PROFESSIONAL ENGINEER
LICENSED
17165
STATE OF IDAHO
JOEL R. HARTMAN
04.20.22

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REVISIONS:

DESCRIPTION	DATE	BY	REV
ISSUED FOR 90% SPRINT RETAIN CD	01/25/2022	EL	A
100% SPT RETAIN CD/LL COMMENTS	04/01/2022	VI	B

SITE NAME:
VANDALS - SP03UB188

SITE NUMBER:
SP01591A

SITE ADDRESS:
964 NEZ PERCE DR
MOSCOW, ID 83844

SHEET DESCRIPTION:
ELEVATIONS

SHEET NUMBER:
A-4

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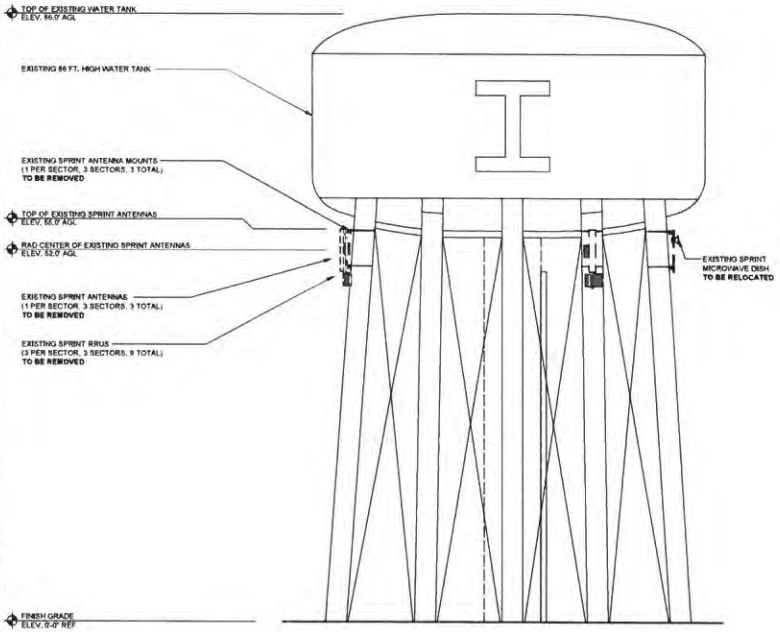
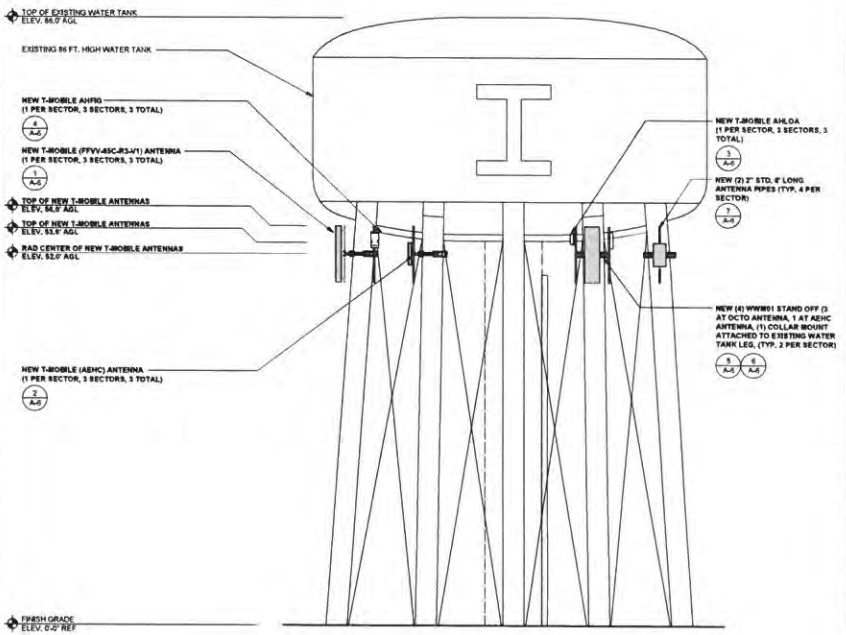


EAST ELEVATION (EXISTING) | SCALE: 1/8" = 1'-0" (24x36) (OR) 1/16" = 1'-0" (11x17) | 1

LANDLORD SIGNATURE



EAST ELEVATION (FINAL) | SCALE: 1/8" = 1'-0" (24x36) (OR) 1/16" = 1'-0" (11x17) | 2

PLANS PREPARED FOR:

T Mobile
601 W. 1ST AVENUE
SPOKANE, WA 99201

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9725 3RD AVENUE NE, STE. 410
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REVISIONS:

DESCRIPTION	DATE	BY	REV
ISSUED FOR 90% SPRINT RETAIN (3)	01/25/2022	FL	A
100%NPT RETAIN COLL COMMENTS	04/12/2022	VI	B

SITE NAME:
VANDALS - SP03UB188

SITE NUMBER:
SP01591A

SITE ADDRESS:
964 NEZ PERCE DR
MOSCOW, ID 83844

SHEET DESCRIPTION:
ELEVATIONS

SHEET NUMBER:
A-5

CONSENT - BAHR

TAB 4 Page 12

ATTACHMENT 1

NOT USED — SCALE N.T.S. — 10

PART NO.	LENGTH	SIZE (O.D.)	WEIGHT
P360	5'-0"	3-1/2" x 60"	35.20 lb
P372	6'-0"	3-1/2" x 72"	47 lb
P3150	12'-6"	3-1/2" x 150"	88 lb
P3160	13'-4"	3-1/2" x 160"	96 lb
P3174	14'-6"	3-1/2" x 174"	115 lb
P3216	18'-0"	3-1/2" x 216"	132 lb
P472	6'-0"	4-1/2" x 72"	64 lb
P4126	10'-6"	4-1/2" x 126"	106 lb
P4204	17'-0"	4-1/2" x 204"	188 lb

FEATURES: FACTORY CUT END, HOT-DIP GALVANIZED PIPE.

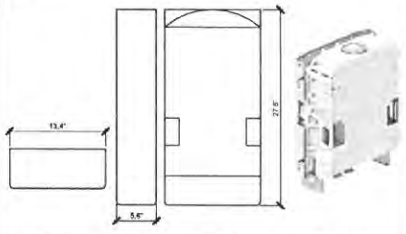
CONSTRUCTION: ASTM53 GRADE B, SCHEDULE 40

DESIGN CRITERIA: CONFORMS TO THE MINIMUM REQUIREMENTS AS STATED ASTM A53 GRADE B STANDARD. ASTM GRADE B STANDARD. ASTM GRADE B (YIELD FY = 35 ksi [240 MPa] / TENSILE Fu = 60 ksi [415 MPa]. ALL FINISHED GOODS ARE HOT DIP GALVANIZED IN ACCORDANCE WITH ASTM A123 REQUIREMENTS.

PIPE DETAIL — SCALE N.T.S. — 7

NOKIA: AIRSCALE 4T4R DUAL MID-BAND RADIO

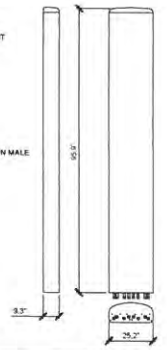
FEATURES	4T4R DUAL MID-BAND RADIO LTE + 5G
DIMENSIONS	27.6" x 13.4" x 5.6" (HxWxD)
WEIGHT	79.4 LBS



AHFIG — SCALE N.T.S. — 4

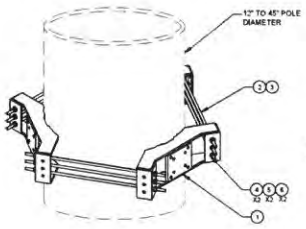
COMMSCOPE: FFVV-65C-R3-V1

RADOME MATERIAL	FIBERGLASS UV RESISTANT
RADOME COLOR	LIGHT GRAY
DIMENSIONS, HxWxD	95.9" x 25.2" x 9.3"
NET WEIGHT	124.6 lb (56.5 kg)
RF CONNECTOR QUANTITY (4) HIGH BAND, (4) LOW BAND	(8) 4.3 - 10 FEMALE
RET INTERFACE	8-PIN DIN FEMALE | 8-PIN DIN MALE



ANTENNA SPECIFICATIONS — SCALE N.T.S. — 1

NOT USED — SCALE N.T.S. — 11



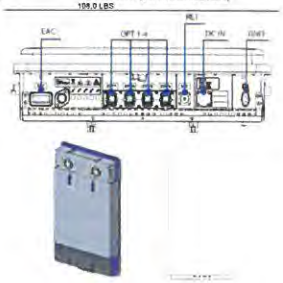
PARTS LIST

ITEM	QTY	PART NO.	PART DESCRIPTION	LENGTH	UNIT WT.	NET WT.
1	3	X-LWRM	RING MOUNT WELDMENT		68.16	204.48
2	9	GS8R-48	5/8" x 48" THREADED ROD (HDG.)	48 in	0.35	3.19
3	9	GS8R-24	5/8" x 24" THREADED ROD (HDG.)	24 in	0.35	3.18
4	18	AS8FW	5/8" HDG A325 FLATWASHER		0.05	0.61
5	18	GS8LW	5/8" HDG LOCKWASHER		0.03	0.47
6	18	AS8NUT	5/8" HDG A325 HEX NUT		0.13	2.34
					TOTAL WT. #	284.35

SITEPRO 1 (LWRM) COLLAR MOUNT — SCALE N.T.S. — 5

NOKIA: MASSIVE MIMO ADAPTIVE ANTENNA (AEHC)

OUTPUT POWER	5 W / TRX (320 W total, 2 W/MHz up to 160 MHz)
FREQUENCY RANGE	2496 MHz - 2690 MHz 3GPP B41
DIMENSIONS	38.2"x 5.9"x21.5" (WITH FRONT COVERS)
WEIGHT	109.0 LBS

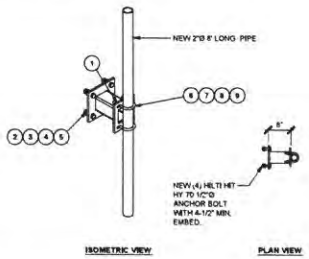


ANTENNA SPECIFICATIONS — SCALE N.T.S. — 2

NOT USED — SCALE N.T.S. — 12

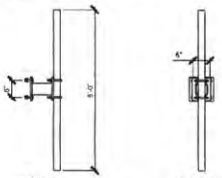
VALMONT SITEPRO1: WWM01

NOTE:
EXISTING ANTENNA MOUNT TO BE REPLACED WITH VALMONT WWM01



PARTS LIST

ITEM	QTY	PART NO.	PART DESCRIPTION	LENGTH	UNIT WT.	NET WT.
1	1	X-WWM01	8" STAND-OFF ARM / WALL MOUNT		18.12	18.12
2	4	GS8LW	5/8" HDG LOCKWASHER		0.03	0.10
3	4	AS8FW	5/8" HDG A325 FLATWASHER		0.03	0.14
4	4	AS8NUT	5/8" HDG A325 HEX NUT		0.13	0.52
5	4	AS82112	5/8" x 2-1/2" HDG A325 HEX BOLT		0.33	1.34
6	2	X-UB1212	1/2" X 2-1/2" X 4-1/2" X 2" GALV. U-BOLT		0.66	1.31
7	2	X-UB1300	1/2" X 3" X 5" X 2" GALV U-BOLT		0.75	1.39
8	2	X-UB1358	1/2" X 3-5/8" X 5-1/2" X 3" GALV U-BOLT		0.77	1.54
7	4	G12FW	1/2" HDG USS FLATWASHER		0.03	0.14
8	4	G12NUT	1/2" HDG HEAVY 2H HEX NUT		0.07	0.29
9	4	G12LW	1/2" HDG LOCKWASHER		0.01	0.06
					TOTAL WT. #	24.95



ANTENNA MOUNT — SCALE N.T.S. — 6

NOKIA: (AIRSCALE DUAL RRH 4T4R B12/71 240W AHLOA

RF MODULE TYPE	RRH, 1 UNIT PER SECTOR
DIMENSIONS, HxWxD: (WITHOUT BRACKETS)	22.05" x 12.13" x 7.44"
WEIGHT: (MOUNTED WEIGHT)	83.78 lbs

AHLOA — SCALE N.T.S. — 3

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REVISIONS:

DESCRIPTION	DATE	BY	REV
ISSUED FOR 90% REPORT RE-TARK CD	01/19/2022	EJ	A
100% RE-TARK CD'S COMMENTS	04/12/2022	MT	B

SITE NAME:

VANDALS - SP03UB188

SITE NUMBER:

SP01591A

SITE ADDRESS:

964 NEZ PERCE DR
MOSCOW, ID 83844

SHEET DESCRIPTION:

DETAILS

SHEET NUMBER:

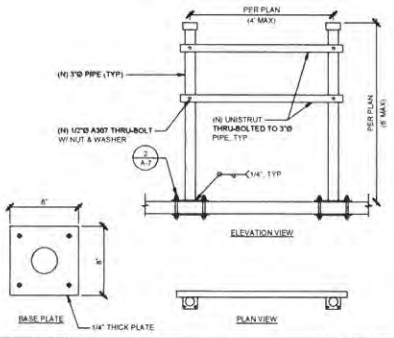
A-6

IF THIS SHEET IS NOT 24" x 36", SCALE RATIO IS NOT VALID FOR REDUCED OR ENLARGED SHEET SIZES

CONSENT - BAHR

TAB 4 Page 13

ATTACHMENT 1



H-FRAME

SCALE N.T.S. 10

NOKIA: 7250 IXR-e

PARAMETER	DESCRIPTION
DIMENSIONS (HxWxD):	1.75"x17.25"x19.0"
CHASIS WEIGHT (UNPOPULATED):	7250 IXR-E 24SFP+ 8SFP28 2QSFP28: 8.5 LBS 7250 IXR-E 14SFP+ 4T: 8.0 LBS
PSU SLOT:	2
MOUNTING:	MOUNT IN A RECOMMENDED 19-INCH EQUIPMENT RACK. THE CHASSIS HAS FACTORY-INSTALLED MOUNTING FLANGES FOR FLUSH-MOUNTING, FACING FORWARDS, IN A 19-INCH RACK

7250 IXR-e 24SFP+8SFP28 2QSFP28 FRONT VIEW:

7250 IXR-e 14SFP+4T FRONT VIEW

INTERCONNECT ROUTER

SCALE N.T.S. 7

NOKIA: AIRSCALE CAPACITY UNIT (ABIA)

DIMENSIONS:	14.2"X8.6"X1.7"
WEIGHT:	4.41 lbs
PRODUCT CODE:	473066A
FUNCTIONS:	INDOOR CAPACITY EXTENSION PLUG IN UNIT. HAS 6 OPTICAL RF INTERFACES UP TO 6 Gbps CBSA/ OR 9.8 Gbps CPRI IQ-COMPRESSION IS SUPPORTED WITH 3 CPRI LINKS

PERSPECTIVE VIEW

ABIA

SCALE N.T.S. 4

NOKIA: AIRSCALE CAPACITY BASEBAND MODULE (ASIB)

DIMENSIONS:	1.6"x8.6"x14.8"
WEIGHT:	6.61 lbs
PRODUCT CODE:	LTE3178
FUNCTIONS:	INDOOR COMMON PLUG IN UNIT INCLUDES TRANSPORT AND CENTRALIZED CONTROL FUNCTIONS FOR SUPPORTED RADIO ACCESS TECHNOLOGIES

PERSPECTIVE VIEW

ASIB

SCALE N.T.S. 1

NOT USED

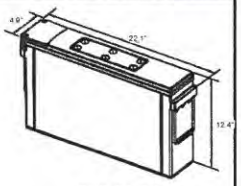
SCALE N.T.S. 11

POWERSAFE: SBS 190F

NOMINAL DIMENSIONS:

LENGTH:	22.1"
WIDTH:	4.9"
HEIGHT:	12.4"
WEIGHT:	132lbs

# OF CELLS	NOMINAL VOLTAGE (V)	8HR RATE .75V/pct @ 77°F	10HR RATE .80V/pc @ 20°F	SHORT CIRCUIT CURRENT (AMPS)	INTERNAL RESISTANCE MILLI-ohms	TERMINALS	ELECTROLYTE (1.300 S.G.) VOLUME (per block)	ELECTROLYTE (1.300 S.G.) WEIGHT (per block)	PURE ACID (H.SO.) VOLUME (per block)	PURE ACID (H.SO.) WEIGHT (per block)	LEAD WEIGHT (per block)
							gal / L	lbs / kg	gal / L	lbs / kg	lbs / kg
6	12	190	190	3800	3.30	M6 M	2.34 / 8.86	25.3 / 11.5	0.66 / 2.49	10.1 / 4.58	95.6 / 43.4



PERSPECTIVE VIEWS

BATTERY SPECIFICATIONS

SCALE N.T.S. 8

NOKIA: AIRSCALE CAPACITY BASEBAND MODULE (ABIC)

DIMENSIONS:	0.98"x8.62"x14.33"
WEIGHT:	5.84 lbs
PRODUCT CODE:	474723A
FUNCTIONS:	ENHANCED INDOOR CAPACITY EXTENSION PLUG IN UNIT

PERSPECTIVE VIEW

ABIC

SCALE N.T.S. 5

NOT USED

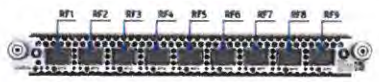
SCALE N.T.S. 2

NOT USED

SCALE N.T.S. 12

NOKIA: AIRSCALE CAPACITY BASEBAND MODULE (ABIO)

DIMENSIONS:	0.98"x8.62"x14.33"
WEIGHT:	5.84 lbs
PRODUCT CODE:	478266A
INGRESS PROTECTION CLASS:	IP20
PORTS:	9xSFP28 PORTS (RF1-RF9)



PERSPECTIVE VIEW

ABIO

SCALE N.T.S. 9

NOKIA: AIRSCALE SUBRACK INDOOR (AMIA)

DIMENSIONS:	5.1" x 16.7" x 17.6"
WEIGHT:	11.2 lbs (AMIA ENCLOSURE)
INGRESS PROTECTION	IP20
OPERATING TEMPERATURE	**-5°C UP TO +55°C OR 60°C (INDOOR)**
INSTALLATION TEMPERATURE	
MAIN PROPERTIES:	IT SUPPORTS UP TO 2 AIRSCALE COMMON PLUG-IN UNITS. IT SUPPORTS UP TO 6 AIRSCALE CAPACITY PLUG-IN UNITS. I CAN BE INSTALLED INSIDE A 19" WIDE RACK OR CABINET. IT INCLUDES A SUBRACK FRAME, A BACKPLANE FOR HIGH BANDWIDTH INTERCONNECT BETWEEN AIRSCALE COMMON AND AIRSCALE CAPACITY PLUG-IN UNITS, HAS FANS WITH CHANGEABLE AIRFLOW DIRECTION, AND HAS BLIND-UNITS TO PREVENT COOLING AIRFLOW LEAKAGE.

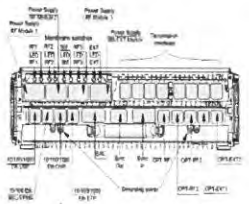
FRONT AND REAR VIEWS

AMIA

SCALE N.T.S. 6

FSMF

DIMENSIONS, HxWxD	5.2" x 11.78" x 16.6"
WEIGHT:	41.9lb

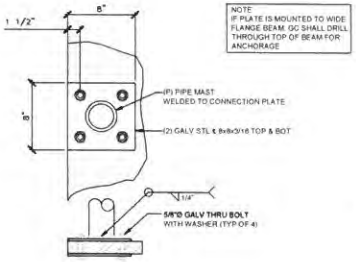


PERSPECTIVE VIEW

FSMF

SCALE N.T.S. 3

NOTE
IF PLATE IS MOUNTED TO WIDE FLANGE BEAM, GC SHALL DRILL THROUGH TOP OF BEAM FOR ANCHORAGE



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04.20.22

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REVISIONS:

DESCRIPTION	DATE	BY	REV
ISSUED FOR 90% SPOINT RETAIN CD	01/25/2022	EC	A
100% SPOINT RETAIN CELL COMMENTS	04/12/2022	VF	0

SITE NAME:

VANDALS - SP03UB188

SITE NUMBER:

SP01591A

SITE ADDRESS:

964 NEZ PERCE DR
MOSCOW, ID 83844

SHEET DESCRIPTION:

DETAILS

SHEET NUMBER:

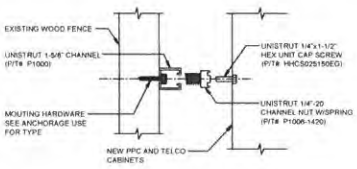
A-7

ANSI B - 11" x 17" - SCALE RATIO IS NOT VALID FOR REDUCED OR ENLARGED SHEET SIZES

CONSENT - BAHR

TAB 4 Page 14

ATTACHMENT 1

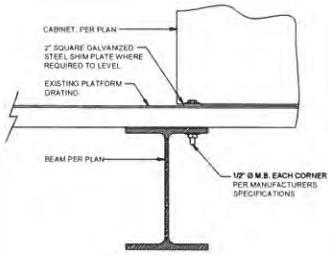


ANCHORAGE USE:
- ⓐ WOOD: 1/2"Ø LAG SCREWS WITH 2" MIN. EMBED.
- ⓑ CONCRETE: 1/2"Ø HILTI KB-TZ WITH 2" EMBED. (ICC-ESR#1917)
- ⓒ CMU: 1/2"Ø HILTI KB3 WITH 2-1/4" MIN. EMBED. (ICC-ESR#1385)
- ⓓ METAL: #10 SIMPSON SELF-DRILLING TAPPING SCREW (ICC-ESR#3006)

IF THRU-BOLTED: 1/2"Ø A307 THRU-BOLTS AND NUTS.

UNISTRUT MOUNTING

SCALE N.T.S. 10



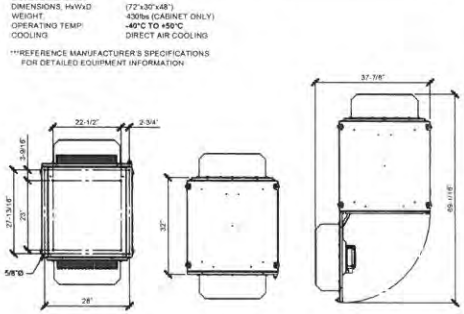
CABINET ANCHOR DETAIL

SCALE N.T.S. 7

PURCELL: HPL3 600A -48POS, 19-23 IN. RAILS, 6KW-DAC, LARGE SSC

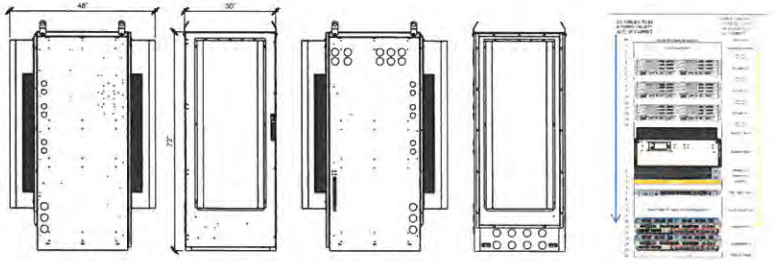
OUTDOOR CABINET DIMENSIONS, HxWxD:	(72"x30"x48")
WEIGHT:	430lbs (CABINET ONLY)
OPERATING TEMP:	-40°C TO +50°C
COOLING:	DIRECT AIR COOLING

***REFERENCE MANUFACTURER'S SPECIFICATIONS FOR DETAILED EQUIPMENT INFORMATION



PLAN VIEW: MOUNTING | PLAN VIEW: DOOR CLOSED | PLAN VIEW: DOOR OPEN | ISOMETRIC VIEW

ENCLOSURE DESIGNED TO COMPLY WITH GR487 ISSUE 5 WIND DRIVEN RAIN HYDROSEN OUT GASSING ACOUSTIC EMISSIONS MERV 18 SALT FOG CORROSION RESISTANCE ZONE 4 SEISMIC VARIOUS OTHER SAFETY: THERMAL, WATER INTRUSION IMPACT, AND PULL TESTS



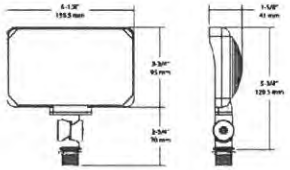
LEFT VIEW | FRONT VIEW | RIGHT VIEW | REAR VIEW | INTERNAL ROUTING & FRONT VIEW

CABINET SPECIFICATIONS

SCALE N.T.S. 2

RAB | OUTDOOR SERVICE LIGHT: X34-35L/120

DIMENSIONS:	6-1/8" x 5-3/4" x 1-5/8" (FLOODLIGHT)
DRIVER INFO	
TYPE:	CONSTANT CURRENT
120V:	0.3A
INPUT WATTS:	34.10W
LED INFO	
WATTS:	35.00W
COLOR TEMP:	5000K (COOL)
COLOR ACCURACY:	85 CRI
L70 LIFESPAN:	50,000
LUMENS:	3,501
EFFICACY:	102.7 LPW



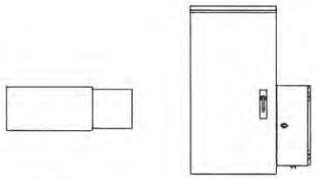
ELEVATIONS

SERVICE LIGHT

SCALE N.T.S. 11

INTERSECT: AA-G-1220042-3R-CL-L

MANUFACTURER:	INTERSECT
MODEL:	AA-G-1220042-3R-CL-L/R
FEATURES:	120/240; 200 A, 1Ø; 3-SOURCE MAINS, ASCO SERIES 300-G PLUS MTS; STRIKESORB, 42 POSITION SQUARE D PANELBOARD, ACCESSORIES 4AR, 11BE, 18RX; NEMA TYPE 3R ENCLOSURE; ICGC LEFT/RIGHT



PLAN VIEW | FRONT ELEVATION

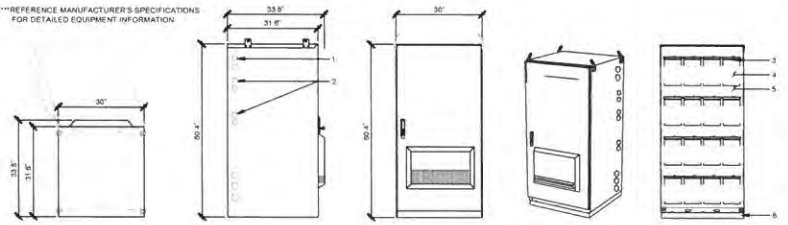
ELECTRICAL PANEL

SCALE N.T.S. 8

PURCELL HPL3 LARGE BATTERY CABINET

OUTDOOR CABINET DIMENSIONS, HxWxD:	(60.4"x30"x33.8")	1.	KNOCKOUT FOR ETHERNET FOR ALARMS	4.	TO 200AH BATTERY BRACKETS
WEIGHT:	350lbs (CABINET ONLY)	2.	KNOCKOUTS FOR BATTERY WIRES	5.	BATTERY VIBRATION MOUNTS
OPERATING TEMP:	-40°C TO +50°C	3.	4X BATTERY SHELVES, UP	6.	SKU# 34038 PURCELL 2" PLINTH (OPTIONAL)
COOLING:	DIRECT AIR COOLING (2) FANS				

***REFERENCE MANUFACTURER'S SPECIFICATIONS FOR DETAILED EQUIPMENT INFORMATION



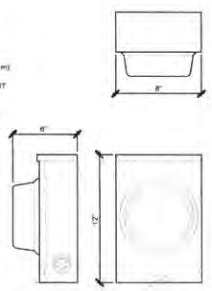
PLAN VIEW | SIDE VIEW | FRONT VIEW | ISOMETRIC VIEW | OPEN FRONT VIEW

CABINET SPECIFICATIONS

SCALE N.T.S. 3

MSFDS - MSF-LLCM-E16S

MANUFACTURE:	MSFDS
MODLE:	MSF-LLCM-E16S
MATERIAL:	ALUMINUM
ENCLOSURE DIMENSIONS: HxWxD:	12" x 8" x 6" (304.8 x 203.2 x 152.4 mm)
METER DIMENSIONS:	8 15/16" DIA. - 5" HEIGHT
GENERATOR INTERFACE:	CAM LOCK/APPLETON
MOUNTING OPTIONS:	WALL, POLE, OR CABINET MOUNT



METER SPECIFICATIONS

SCALE N.T.S. 12

PANTROL: PANLOC LITE

DIMENSIONS:	19.5"H X 8"W X 9.25"D
FEATURES:	ELIMINATES MULTIPLE GENERATOR PLUGS AND ADAPTERS INDUSTRY STANDARD COLOR CODED SINGLE POLE CONNECTORS TOUCH SAFE DESIGN INDUSTRY STANDARD MOUNTING DECREASED DOWN TIME 200A, 3-PHASE CAPABILITIES KAIC RATING UP TO 10,000 AMPS ALUMINUM CONSTRUCTION REMOVABLE ACCESS COVER EASE OF USE UL LISTED

ELEVATIONS

CAM LOCK

SCALE N.T.S. 9

PLANS PREPARED FOR:	T-Mobile, 601 W. 1ST AVENUE, SPOKANE, WA 99201
PLANS PREPARED BY:	Technology Associates, SPOKANE MARKET OFFICE, 9725 3RD AVENUE NE, STE. 410, SEATTLE, WA 98115
MLA PARTNER:	
JURISDICTION APPROVAL SEAL:	
ENGINEERING SEAL:	PROFESSIONAL ENGINEER LICENSED 17165 STATE OF IDAHO JOEL R. HARTMAN 04.20.22

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REVISIONS:

DESCRIPTION	DATE	BY	REV
ISSUED FOR 90% SPRINT RETAIN CD	01/26/2022	EL	A
100%SPT RETAIN CD'S COMMENTS	04/12/2022	VF	B

SITE NAME:	VANDALS - SP03UB188
SITE NUMBER:	SP01591A
SITE ADDRESS:	964 NEZ PERCE DR, MOSCOW, ID 83844
SHEET DESCRIPTION:	DETAILS
SHEET NUMBER:	A-8

ALL PLANS ARE TO BE PRINTED ON 24" x 36". SCALE RATIO IS NOT VALID FOR REDUCED OR ENLARGED SHEET SIZES

CONSENT - BAHR

TAB 4 - Page 15

Installation Instructions

COMMSCOPE on the go

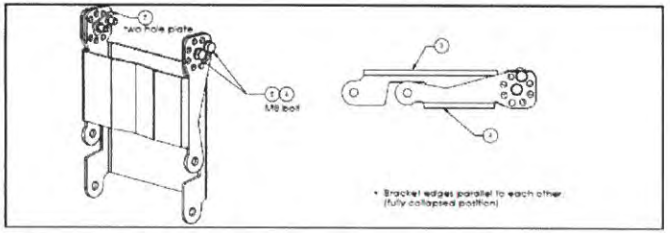
Mounting Kits For Wide Panel Antennas

BSAMNT Series: Mounting systems for cylindrical pipe installations (60-115mm pipe diameter) for heavy duty applications

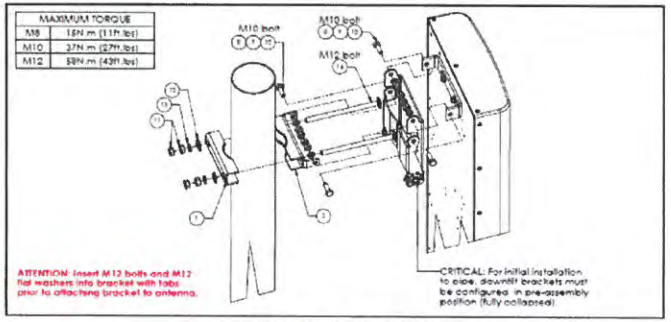
Andrew Institute offers installation training.

ITEM NO.	DESCRIPTION	QTY	U/M
1	PIPECLAMP BRACKET, NO FLANGE	2	EA
2	PIPECLAMP BRACKET, SHORT FLANGES	2	EA
3	NOTCHED BRACKET	1	EA
4	BRACKET	1	EA
5	SCR,HH,HEX,M8X25,SST,PASS	4	EA
6	WSHR,LK,SPLT,M8,STL,GALV	4	EA
7	TWO HOLE PLATE, 8mm X 1.25 PITCH	2	EA
8	NUT,HEX,M10,STL,GALV	12	EA
9	WSHR,LK,SPLT,M10,STL,GALV	6	EA
10	SCR,HCS,HEX,M10X40,STL,GALV	4	EA
11	NUT,HEX,M12,STL,GALV	8	EA
12	WSHR,FLT,M12,13X28X2.5,STL,GALV	4	EA
13	WSHR,LK,SPLT,M12,STL,GALV	4	EA
14	BOLT,CARRIAGE,M12 X 200,STL,GALV	4	EA

Part Lists

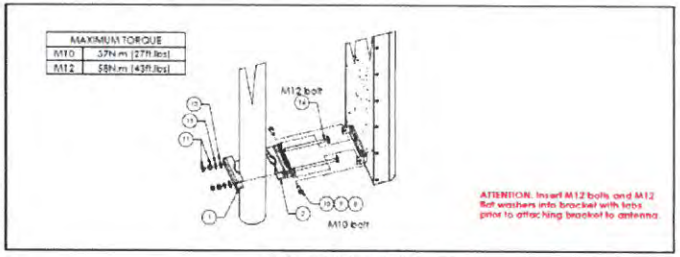


Pre-assembly of Downtilt Brackets

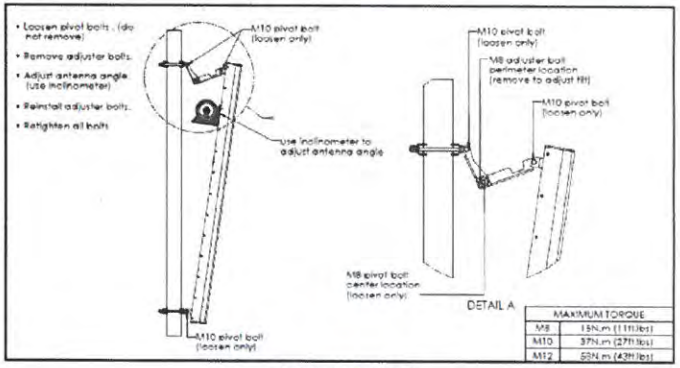


Top / Middle Mount Installations

(Continued from page 1)



Bottom Mount Installation



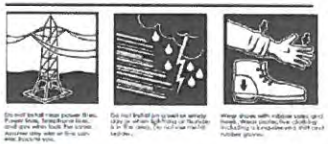
Adjusting Antenna Tilt

SAFETY NOTICE

The installation, maintenance, or removal of an antenna requires qualified, experienced personnel. CommScope installation instructions are written for such installation personnel. Antenna systems should be inspected once a year by qualified personnel to verify proper installation, maintenance, and condition of equipment.

CommScope disclaims any liability or responsibility for the results of improper or unsafe installation practices.

It is recommended that transmit power be turned off when the field installation is performed. Follow all applicable safety precautions as shown on this page.



CommScope
Customer Support Center
North America: +1-800-255-1479, Option 1
International: +1-779-435-4000, Option 1
Email: BSASupport@CommScope.com

www.commscope.com/andrew
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ORIGINAL DRAWING SIZE: 36" x 24" - SCALE RATIO IS NOT VALID FOR REDUCED OR ENLARGED SHEET SIZES

PLANS PREPARED FOR:

T-Mobile

601 W. 1ST AVENUE
SPOKANE, WA 99201

PLANS PREPARED BY:

Technology Associates

SPOKANE MARKET OFFICE
9725 3RD AVENUE NE, STE. 410
SEATTLE, WA 98115

MLA PARTNER:

JURISDICTION APPROVAL SEAL:

ENGINEERING SEAL:

PROFESSIONAL ENGINEER LICENSED 17165 STATE OF IDAHO JOEL R. HARTMAN
04.20.22

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REVISIONS:

DESCRIPTION	DATE	BY	REV
ISSUED FOR 60% SPRINT RETAIN CD	01/25/2022	EL	A
100% SPT RETAIN CD/EL COMMENTS	04/12/2022	VF	B

SITE NAME:

VANDALS - SP03UB188

SITE NUMBER:

SP01591A

SITE ADDRESS:

964 NEZ PERCE DR
MOSCOW, ID 83844

SHEET DESCRIPTION:

ANTENNA MOUNTING SPECIFICATIONS

SHEET NUMBER:

A-9

ATTACHMENT 1

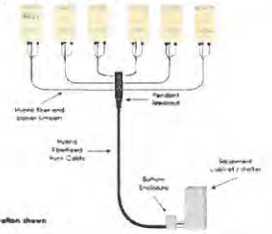
CONSENT - BAHR

TAB 4 Page 16

ATTACHMENT 1

Technical Publication COMMSCOPE

Section 1: HELIAX® FiberFeed® Pendant Connect



4 RRU configuration shown

Accessories

Ordering no.	Remarks
FE-16148-OVF-B12	Fiber and power cable connection enclosure. Weatherproof to IP67

Hangar

Ordering no.	Remarks
[illegible]	Single Hangar for FD5056 series fiber cable, kit of 10
[illegible]	Double Hangar for FD5056 series fiber cable, kit of 10
[illegible]	Snap-Link® Hangar, for 14mm2 series cable grommet required, kit of 10
[illegible]	Hangar Grommet for 5/8in (1.6 cm) hole
[illegible]	Snap-Link® Hangar for fiber and power cable grommet required, kit of 10
[illegible]	Hangar Grommet for 5/8in (1.6 cm) hole

Other

Ordering no.	Remarks
[illegible]	Mounting grip for FD5056 fiber
[illegible]	Universal grounding kit
[illegible]	DLC RJ-45 interface cable
[illegible]	Angle Adapter

Technical Publication COMMSCOPE

Section 2: General Specifications

Cable Type	FD5056-24B5A-XXX
Brand	HELIAX® FiberFeed®
Center Conductor Gauge	4 AWG
Conductors, quantity	24
Total Fiber Quantity	48
Shielding Type	Corrugated, aluminum
Fiber Type	Bend insensitive, single mode fiber ITU-T G.657 A2
Construction Type	Direct Breakout

Dimensions

Cable, Weight	1480.2 kg/km (.995.2 lb/kft)
Diameter Over Jacket	30.58 mm (1.20 in)
Breakout Length, Fiber, end 1	HDLC Connectors
Breakout Length, Power, end 1	HDLC Connectors
Breakout Length, Fiber, end 2	836 mm (32.9 in)
Breakout Length, Power, end 2	776 mm (30.6 in)

Physical Specifications

Minimum Bend Radius, loaded	609.4 mm (24 in)
Minimum Bend Radius, unloaded	356.5 mm (13 in)
Tensile Load, long term, maximum	1068 N (240 lbf)
Tensile Load, short term, maximum	2669 N (600 lbf)

Cable Type	FD5056-4W5B-XXX
Brand	HELIAX® FiberFeed®
Center Conductor Gauge	4 AWG
Conductors, quantity	12
Total Fiber Quantity	48
Shielding Type	Corrugated, aluminum
Fiber Type	Bend insensitive, single mode fiber ITU-T G.657 A2
Construction Type	Direct Breakout

Dimensions

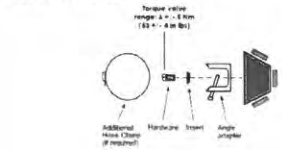
Cable, Weight	2644.0 kg/km (1777.0 lb/kft)
Diameter Over Jacket	39.39 mm (1.55 in)
Breakout Length, Fiber, end 1	HDLC Connectors
Breakout Length, Power, end 1	HDLC Connectors
Breakout Length, Fiber, end 2	836 mm (32.9)
Breakout Length, Power, end 1	776 mm (30.6)

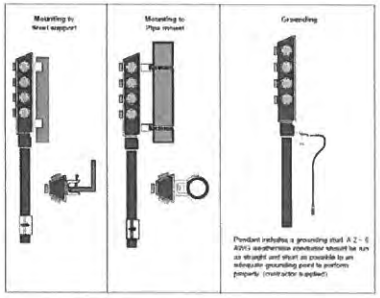
Physical Specifications

Minimum Bend Radius, loaded	787.4 mm (31.0 in)
Minimum Bend Radius, Unloaded	476.4 mm (18.8 in)
Tensile Load, long term, maximum	801 N (180 lbf)
Tensile Load, short term, maximum	2669 N (600 lbf)

Technical Publication COMMSCOPE

Section 4: Mounting / Grounding





Technical Publication COMMSCOPE

Section 5: General Specifications Pendant to RRU Tails

- In general this cable will handle similarly to coaxial cable
- The terminated fiber ends however are fragile and must be protected during installation. Leave the packaging around the fiber ends in place until ready to make final connection of the jumper at the RRU or BBU.
- DO NOT BEND THE FIBER ENDS TIGHTER THAN 30 mm (1.2 in) BEND RADIUS ELSE THERE IS A RISK OF BREAKING THE GLASS FIBERS.
- Attach the main cable securely to the structure or equipment using mount to prevent strain on connectors from movement in small or unsolicited conditions.
- Ensure the DLC fiber connector is seated firmly in RRU.
- HDLC connection have indicate markings for proper alignment.
- HDLC outdoor connector is a 1/4 turn, tighten until the shell hits a positive stop.
- Ensure the weatherproof boots for both fiber and power connections are seated firmly at the RRU.
- Installation temperature ranges is -40 °C to 70 °C (-40 °F to 158 °F).
- All fails are individually serialized, for immediate access to test results visit www.commscope.com/weblink/

General Specifications

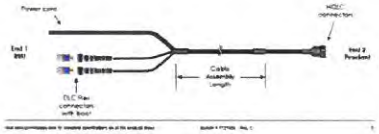
Cable Type	HFF4-15-XXXFF1-xx	HFF4-15-XXXFF4-Sxx (for FeX3)
Brand	HELIAX® FiberFeed®	HELIAX® FiberFeed®
Total Fiber Quantity	4	4
Fiber Type	Bend insensitive single mode fiber ITU-T G.657 A2	Bend insensitive single mode fiber ITU-T G.657 A2
Jacket Color	Black	Black

Dimensions

Cable, Weight	465.1 kg/km (.304.4 lb/kft)	465.1 kg/km (.304.4 lb/kft)
Breakout Length Fiber, end 1	838 mm (.33 in)	1600 mm (.63 in)
Breakout Length Power, end 1	914 mm (.36 in)	457 mm (.18 in)
Breakout Length Fiber, end 2	600 mm (.24 in)	600 mm (.24 in)
Diameter Over Jacket	16.51 mm (.0.62 in)	16.51 mm (.0.70 in)

Physical Specifications

Minimum Bend Radius, loaded	245.6 mm (.9.6 in)	346.0 mm (.14 in)
Minimum Bend Radius, unloaded	201.2 mm (.8.0 in)	201.0 mm (.8.0 in)
Tensile Load, long term, maximum	801 N (.180 lbf)	801 N (.180 lbf)
Tensile Load, short term, maximum	2669 N (.600 lbf)	2669 N (.600 lbf)



Technical Publication COMMSCOPE

Section 7: General Specifications Bottom Enclosure to BBU Direct breakout Trunk

- In general cables will handle similarly to a coaxial cable.
- The terminated fiber ends however are fragile and must be protected during installation. Leave the packaging around the fiber ends in place until ready to make final connect of the jumper at the RRU or BBU.
- DO NOT BEND THE FIBER ENDS TIGHTER THAN 30 mm (1.2 in) BEND RADIUS ELSE THERE IS A RISK OF BREAKING THE GLASS FIBERS.
- Attach the cable securely to the structure or equipment rack using tie straps or velcro to prevent strain on the cables.
- Ensure the DLC fiber connector is seated firmly in Enclosure and BBU.
- Installation temperature range is -30 °C to 70 °C (-22 °F to 158 °F).
- All fails are individually serialized, for immediate access to test results visit www.commscope.com/weblink/

General Specifications

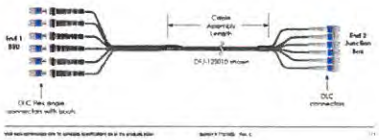
Cable Type	FD5056-4W5B-XXX	FD5056-4W5B-XXX	FD5056-4W5B-XXX	FD5056-4W5B-XXX
Brand	HELIAX® FiberFeed®	HELIAX® FiberFeed®	HELIAX® FiberFeed®	HELIAX® FiberFeed®
Total Fiber Quantity	4	12	24	48
Fiber Type	Bend insensitive single mode fiber ITU-T G.657 A2	Bend insensitive single mode fiber ITU-T G.657 A2	Bend insensitive single mode fiber ITU-T G.657 A2	Bend insensitive single mode fiber ITU-T G.657 A2
Jacket Color	Black	Black	Black	Black

Dimensions

Cable, Weight	49 kg/km (.45 lb/kft)	49 kg/km (.46 lb/kft)	49 kg/km (.46 lb/kft)	49 kg/km (.46 lb/kft)
Breakout Length Fiber, end 1	762 mm (.30 in)	914 mm (.36 in)	762 mm (.30 in)	762 mm (.30 in)
Breakout Length Fiber, end 2	1067 mm (.42 in)	1067 mm (.42 in)	1067 mm (.42 in)	330 mm (.13 in)
Diameter Over Jacket	9 mm (.0.5" in	9 mm (.0.5" in	9 mm (.0.5" in	9 mm (.0.5" in

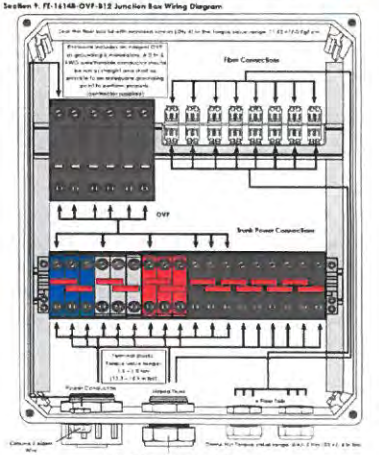
Physical Specifications

Minimum Bend Radius, loaded	13 mm (.4.7 in	13 mm (.4.7 in	13 mm (.4.7 in	13 mm (.4.7 in
Minimum Bend Radius, unloaded	9.2 mm (.3.1 in	9.5 mm (.3.1 in	9.0 mm (.3.1 in	9.4 mm (.3.1 in
Tensile Load, long term, maximum	489 N (.90 lbf	400 N (.90 lbf	489 N (.90 lbf	400 N (.90 lbf
Tensile Load, short term, maximum	1334 N (.300 lbf	1334 N (.300 lbf	1334 N (.300 lbf	1334 N (.300 lbf



Technical Publication COMMSCOPE

Section 9: FE-16148-OVF-B12 Junction Box Wiring Diagram



Power cords are labeled per sector.

The power labels can be lost if the length is significantly reduced during installation. Always re-label conductors before cutting off excess.

ANTENNA MOUNTING SPECIFICATIONS

SCALE N.T.S. 1

PLANS PREPARED FOR:

T-Mobile

601 W. 1ST AVENUE
SPOKANE, WA 99201

PLANS PREPARED BY:

Technology Associates

SPOKANE MARKET OFFICE
9725 3RD AVENUE NE, STE. 410
SEATTLE, WA 98115

MLA PARTNER:

JURISDICTION APPROVAL SEAL:

ENGINEERING SEAL:

PROFESSIONAL ENGINEER LICENSED 17165 STATE OF IDAHO JOEL R. HARTMAN
04.20.22

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REVISIONS:

DESCRIPTION	DATE	BY	REV
ISSUED FOR 90% SPRINT RETAIN CD	01/25/2022	TS	A
100%SPT RETAIN CD/LE COMMENTS	04/12/2022	VT	B

SITE NAME:

VANDALS - SP03UB188

SITE NUMBER:

SP01591A

SITE ADDRESS:

964 NEZ PERCE DR
MOSCOW, ID 83844

SHEET DESCRIPTION:

HELIAX FIBER FEED PENDANT CONNECT

SHEET NUMBER:

A-10

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CONSENT - BAHR

TAB 4 Page 17

ATTACHMENT 1

ELECTRICAL GROUNDING SPECIFICATIONS

1. GROUNDING SHALL COMPLY WITH ARTICLE 250 OF THE NATIONAL ELECTRICAL CODE CURRENTLY IN EFFECT FOR THE AUTHORITY HAVING JURISDICTION.
2. ALL GROUNDING DEVICES SHALL BE U.L. LISTED FOR THEIR INTENDED USE.
3. GROUND WIRES SHALL BE TINNED #2 AWG BARE SOLID COPPER UNLESS OTHERWISE NOTED.
4. CONNECTIONS OF ALL GROUND WIRES TO THE GROUND RING SHALL BE EXOTHERMIC (CAD-WELDED), UNLESS OTHERWISE NOTED, AND SHALL BE INSTALLED IN ACCORDANCE WITH MANUFACTURER'S RECOMMENDATIONS AND T-MOBILE WIRELESS BROADBAND STANDARDS.
5. GROUNDING CONDUCTORS SHALL BE ROUTED ALONG THE SHORTEST AND STRAIGHTEST PATH POSSIBLE. WHEN REQUIRED, GROUND LEADS SHALL BE BENT TO A MINIMUM OF 8" RADIUS.
6. WHERE GROUND WIRES ARE ROUTED FROM ANY CONNECTION ABOVE GRADE TO THE GROUND RING, INSTALL WIRE IN 3/4" HEAVY WALL LIQUID TIGHT FLEXIBLE CONDUIT FROM CONNECTION POINT TO 5" BELOW GRADE AND SEAL THE TOP WITH SILICONE SEALANT.
7. ALL GROUND BARS SHALL BE TINNED, 1/4" COPPER, SECTOR BARS 2", COLLECTOR AND MGB BARS 4", OF SUFFICIENT LENGTH TO ACCOMMODATE ALL REQUIRED CONNECTIONS WITHOUT DOUBLING LUGS, AND EACH INSTALLED WITH ISOLATORS. WHEN CONNECTING GROUND BARS (WITHIN 10 FEET OF GRADE) DIRECTLY TO THE GROUND RING, 2 EA. #2 SOLID DOWNLEADS SHALL BE CAD-WELDED TO THE GROUND BAR, 1 AT EACH OPPOSITE BOTTOM CORNER, AND EACH SHALL RUN IN 3/4" HEAVY WALL LIQUID TIGHT FLEXIBLE CONDUIT FROM GROUND BAR DOWN TO THE GROUND RING. WHEN CONNECTING SECTOR GROUND BARS DAISY-CHAIN THE GROUND BARS AND RUN 1 EA. #2 AWG STRANDED COPPER WIRE WITH THWN INSULATION FROM THE MIDDLE GROUND BAR TO THE GROUND RING AND CAD-WELD TO THE RING.
8. WHEN ATTACHING STRANDED GROUND LEADS TO THE GROUND BARS, 2 HOLE COMPRESSION LUGS SHALL BE USED. PROTECT WITH WEATHERPROOF HEAT SHRINK, AND WITH A THIN COAT OF "NOPR SHIELD" OR EQUIVALENT PROPERLY APPLIED AND ATTACHED ONLY WITH STAINLESS STEEL HARDWARE.
9. WHEN GROUNDING EQUIPMENT ENCLOSURES, PANELS, FRAMES, AND OTHER METAL APPARATUS, A #6 AWG STRANDED COPPER WIRE WITH THWN INSULATION SHALL BE ATTACHED UTILIZING A 2 HOLE COMPRESSION TYPE LUG, PROTECTED WITH WEATHERPROOF HEAT A CLEAN AND CORROSION FREE METALLIC SURFACE UTILIZING STAINLESS STEEL SELF-TAPPING SCREWS AS NOTED IN NOTE 10 BELOW.
10. PREPARE ALL BONDING SURFACES FOR GROUND CONNECTIONS BY REMOVING ANY AND ALL PAINT AND CORROSION TO SHINY METAL, FOLLOWING CAD-WELDED CONNECTIONS TO NON-COPPER SURFACES, APPLY ONE COAT OF ANY ANTI-OXIDIZING PAINT, "COLD GALV" OR EQUIVALENT.
11. GROUND RODS SHALL BE COPPER-CLAD STEEL 5/8"x10', SPACED NO LESS THAN 10' ON CENTER.
12. ALL GROUND SYSTEM CONDUCTORS AND CONDUITS SHALL BE SECURED UTILIZING ONLY NONMETALLIC, NON-CONDUCTIVE, UV RATED, CLAMPS, BRACKET, AND OR SUPPORTS.
13. WHEN REQUIRED, THE CONTRACTOR SHALL ENGAGE THE SERVICES OF AN INDEPENDENT TESTING FIRM TO VERIFY, UTILIZING A MEGGER TEST, THAT THE RESISTANCE TO EARTH OF THE NEW GROUND SYSTEM IS EQUAL TO OR LESS THAN 5 (OHMS). A COPY OF THE COMPLETE TESTING REPORT SHALL BE PROVIDED TO THE T-MOBILE REPRESENTATIVE.
14. ALL MATERIALS AND HARDWARE SHALL BE INSTALLED IN A WORKMAN-LIKE MANNER IN ACCORDANCE WITH MANUFACTURER'S RECOMMENDATIONS, AND DEFINED IN NFPA-70 AND APPROVED BY A.H.J.

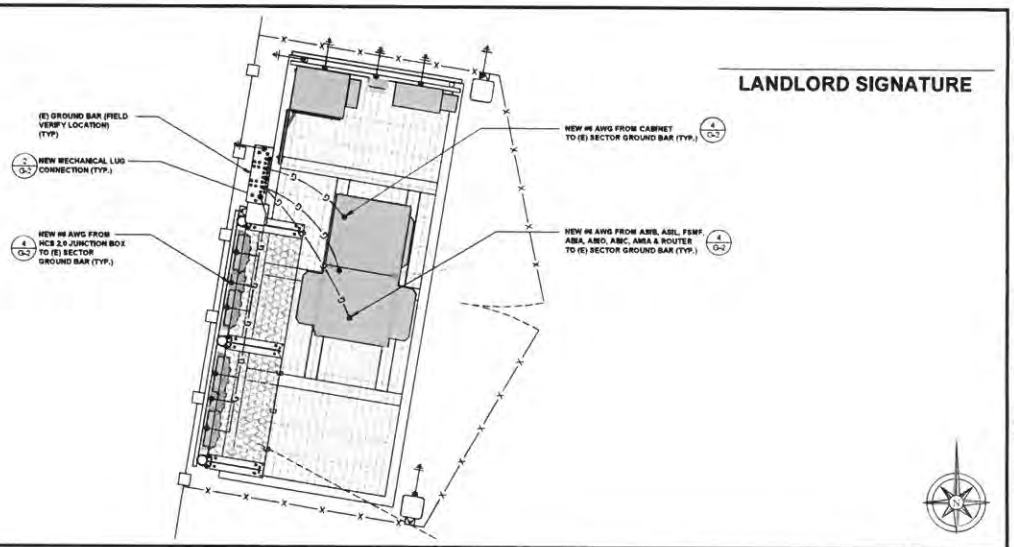
LEGEND	
■	EXOTHERMIC CONNECTION
●	MECHANICAL CONNECTION
	EQUIPMENT GROUND BAR
	ANTENNA GROUND BAR (AS REQUIRED)
	#2 AWG GROUND LEAD (AS REQUIRED)

NOTE

1. CONTRACTOR TO REPLACE ALL MISSING GROUND BARS AND GROUNDING CONNECTIONS AS REQUIRED.

NOTES & LEGEND

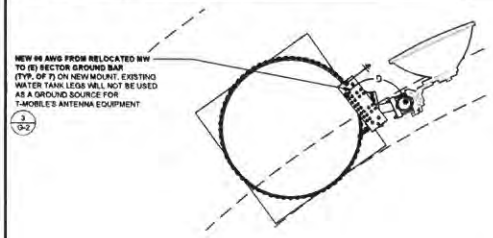
SCALE N.T.S. 1

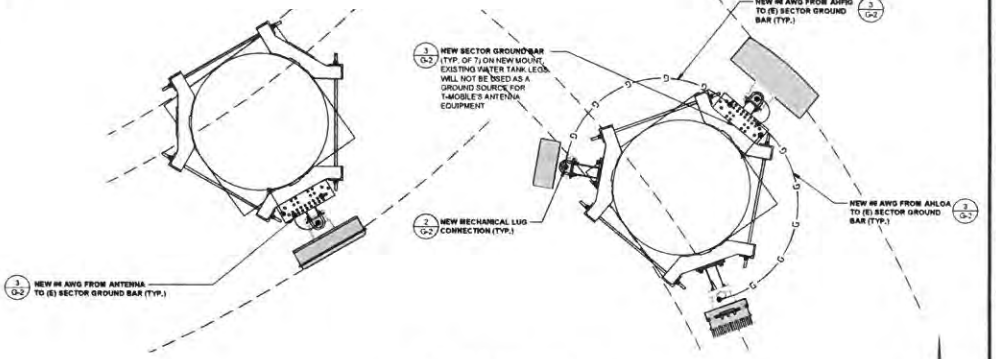


LANDLORD SIGNATURE

EQUIPMENT GROUNDING

SCALE N.T.S. 2





TYP. OF ALL SECTORS

ANTENNA GROUNDING

SCALE N.T.S. 3

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T-Mobile

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SPOKANE, WA 99201

PLANS PREPARED BY:

Technology Associates

SPOKANE MARKET OFFICE
9725 3RD AVENUE NE, STE. 410
SEATTLE, WA 98115

MLA PARTNER:

JURISDICTION APPROVAL SEAL:

ENGINEERING SEAL:

PROFESSIONAL ENGINEER LICENSED 17165 STATE OF IDAHO JOEL R. HARTMAN

04.20.22

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100% SUBMIT RETAIN CD/LC COMMENTS	04/12/2022	VP	0

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SITE NUMBER:

SP01591A

SITE ADDRESS:

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MOSCOW, ID 83844

SHEET DESCRIPTION:

GROUNDING PLANS

SHEET NUMBER:

G-1

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CONSENT - BAHR

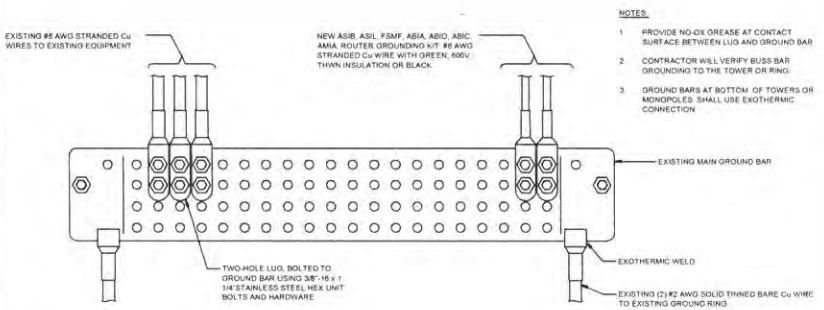
TAB 4 Page 18

ATTACHMENT 1

LANDLORD SIGNATURE

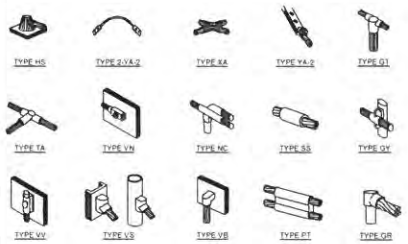
SCALE N.T.S. 10

MAIN GROUND BAR



SCALE N.T.S. 4

EXOTHERMIC WELDING



NOTE

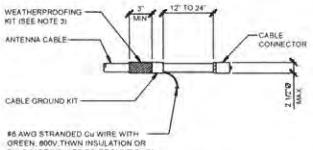
ERICO EXOTHERMIC "MOLD TYPES" SHOWN HERE ARE EXAMPLES. CONSULT WITH PROJECT MANAGER FOR SPECIFIC MOLDS TO BE USED FOR THIS PROJECT.

SCALE N.T.S. 1

SCALE N.T.S. 11

SCALE N.T.S. 8

CABLE GROUNDING



ANTENNA AND/OR GPS CABLE CONNECTION

NOTES:

1 DO NOT INSTALL CABLE GROUND KIT AT A BEND AND ALWAYS DIRECT GROUND WIRE DOWN TO GROUND BAR.

2 GROUNDING KIT TYPE SHALL BE APPROVED BY TMO PRIOR TO INSTALLATION.

3 WEATHERPROOFING SHALL INCORPORATE PPC WEATHERPROOFING TAPE KIT, COLD SHRINK SHALL NOT BE USED.

SCALE N.T.S. 5

MECHANICAL LUG

WIRE SIZE	BURNDY LUG	BOLT SIZE
#6 AWG GREEN INSULATED	YA6C-2TC38	3/8" - 16 NC S 2 BOLT
#2 AWG SOLID TINNED	YA3C-2TC38	3/8" - 16 NC S 2 BOLT
#2 AWG STRANDED	YA2C-2TC38	3/8" - 16 NC S 2 BOLT
#2/0 AWG STRANDED	YA26-2TC38	3/8" - 16 NC S 2 BOLT
#4/0 AWG STRANDED	YA26-2N	1/2" - 13 NC S 2 BOLT

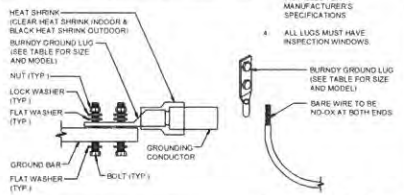
NOTES:

1 ALL HARDWARE BOLTS, NUTS, LOCK WASHERS SHALL BE STAINLESS STEEL. ALL HARDWARE ARE TO BE AS FOLLOWS: BOLT, FLAT WASHER, GROUND BAR, GROUND LUG, FLAT WASHER, LOCK WASHER AND NUT

2 COPPER SHIELD, ANTIOX, OR NO-OX OR EQUIVALENT SHALL BE PLACE WHERE ALL DISSIMILAR METALS CONNECT

3 ALL LUGS ARE TO BE INSTALLED PER MANUFACTURER'S SPECIFICATIONS

4 ALL LUGS MUST HAVE INSPECTION WINDOWS.



SCALE N.T.S. 2

NOT USED

SCALE N.T.S. 12

SCALE N.T.S. 9

SCALE N.T.S. 6

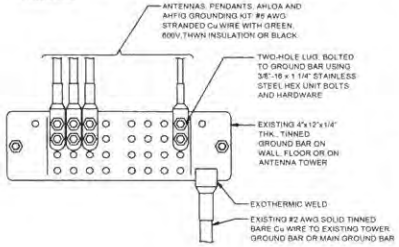
SECTOR GROUND BAR

NOTES:

1 PROVIDE NO-OX GREASE AT CONTACT SURFACE BETWEEN LUG AND GROUND BAR

2 CONTRACTOR WILL VERIFY BUSS BAR GROUNDING TO THE TOWER OR RING

3 GROUND BARS AT BOTTOM OF TOWERS OR MONOPOLES SHALL USE EXOTHERMIC CONNECTION.



SCALE N.T.S. 3

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SPOKANE, WA 99201

PLANS PREPARED BY:

Technology Associates

SPOKANE MARKET OFFICE:
9725 3RD AVENUE NE, STE. 410
SEATTLE, WA 98115

MLA PARTNER:

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ENGINEERING SEAL:

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[illegible]	04/12/2022	[illegible]	B

SITE NAME:

VANDALS - SP03UB188

SITE NUMBER:

SP01591A

SITE ADDRESS:

964 NEZ PERCE DR
MOSCOW, ID 83844

SHEET DESCRIPTION:

GROUNDING DETAILS

SHEET NUMBER:

G-2

"1:36" SCALE RATIO IS NOT VALID FOR REDUCED OR ENLARGED SHEET SIZES

CONSENT - BAHR

TAB 4 Page 19

ATTACHMENT 1

LANDLORD SIGNATURE

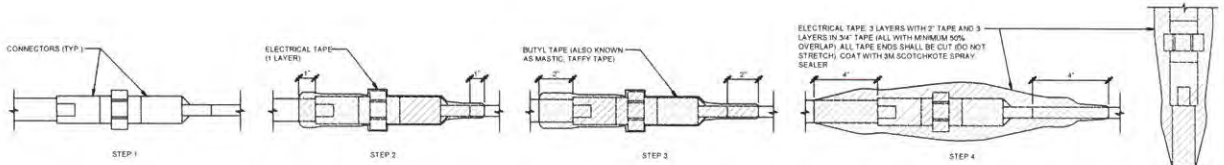
ANTENNA SCHEDULE-FINAL CONFIGURATION

SECTOR (COLOR)	POSITION	EXISTING/ NEW	MANUFACTURER	ANTENNA MODEL	PORT	ANTENNA AZIMUTH	RAD CENTER	DIMENSIONS (LxWxD)	WEIGHT (LBS)	TRANSMISSION CABLE			
										QTY	LENGTH	SIZE	TYPE
ALPHA (RED)	A1	NEW	COMMSCOPE	FFVV-65C-R3-V1	OCTA	40°	52.0'	95.9" x 25.2" x 9.3"	127.6	(2)	15'	1.5"Ø	HCS 2.0 JUMPER
	A2	NEW	NOKIA	AEHC	MIMO	40°	52.0'	38.2" x 21.5" x 5.9"	108.0	(1)	60'	1.5"Ø	HCS 2.0 JUMPER
										(1)	200'	1.5"Ø	HCS 2.0 TRUNK
BETA (GREEN)	B1	NEW	COMMSCOPE	FFVV-65C-R3-V1	OCTA	160°	52.0'	95.9" x 25.2" x 9.3"	127.6	(2)	15'	1.5"Ø	HCS 2.0 JUMPER
	B2	NEW	NOKIA	AEHC	MIMO	160°	52.0'	38.2" x 21.5" x 5.9"	108.0	(1)	15'	1.5"Ø	HCS 2.0 JUMPER
										(2)	150'	1.5"Ø	HCS 2.0 TRUNK
GAMMA (BLUE)	C1	NEW	COMMSCOPE	FFVV-65C-R3-V1	OCTA	280°	52.0'	95.9" x 25.2" x 9.3"	127.6	(2)	15'	1.5"Ø	HCS 2.0 JUMPER
	C2	NEW	NOKIA	AEHC	MIMO	280°	52.0'	38.2" x 21.5" x 5.9"	108.0	(1)	15'	1.5"Ø	HCS 2.0 JUMPER
										(2)	175'	1.5"Ø	HCS 2.0 TRUNK

NOTE:
1 ANTENNA CLEARANCE AND MOUNTING TO BE FIELD VERIFIED PRIOR TO CONSTRUCTION WITH FINAL ANTENNA SPECIFICATIONS, MOUNTING HARDWARE, AND RF DESIGN.
2 **CD IS BASED ON RFDS VERSION: 1 DATED: 01/18/2022.**

ANTENNA AND COAX GENERAL NOTES:

1. ALL ANTENNA AND COAXIAL ANTENNA CABLE TO BE FURNISHED BY T-MOBILE AND INSTALLED BY CONTRACTOR.
2. COAX COLOR CODING: ANTENNAS TO BE NUMBERED IN A CLOCKWISE MANNER FROM TRUE NORTH AND COLOR CODED AS FOLLOWS:
3. THE ABOVE COAX COLOR CODING APPLIES TO SECTORIZED SITES. FOR OMNI SITES, USE THE ATO, BTO, & GTO COLOR CODES ONLY.
4. COAX SHALL BE TAGGED WITH COLOR CODING AT (2) PLACES USING 1" WIDE WEATHER PROOF COLORED VINYL TAPE AT THE FOLLOWING LOCATIONS:
   - #1 - AT ANTENNA CONNECTION
   - #2 - AT ENTRY TO EQUIPMENT CABINET
5. RUN COAXIAL CABLE WITH MINIMUM 12" SLACK & 12" FROM EDGE OF EQUIPMENT CABINETS, ACROSS WAVE GUIDE BRIDGE (IF APPLICABLE), UP TO TOWER LEG (IF APPLICABLE), & DISTRIBUTE TO EACH ANTENNA DEVICE. FURNISH AND INSTALL A MINIMUM OF (3) GROUND KITS PER COAXIAL CABLE ACCORDING TO ELECTRICAL DRAWINGS. VERIFY NUMBER OF ANTENNAS, CABLE, & CABLE DIAMETER WITH PROJECT MANAGER.
6. ALL COAXIAL CABLE CONNECTIONS TO BE WEATHER PROOFED.
7. CONTRACTOR TO DIP CABLES AND JUMPERS WHERE NECESSARY.
8. TAGGING:
   - ALL COAXIAL CABLES TO BE MARKED WITH COLOR CODED TAPE TO INDICATE THE ANTENNA SECTOR.
   - COLORED ELECTRICAL TAPE SHALL MARK EACH END OF CABLE AND EACH END OF JUMPERS AS CLOSE TO EACH END AS POSSIBLE. (NOT TO INTERFERE WITH WEATHERPROOFING.)
9. COAXIAL CABLE SPECIFICATIONS REQUIRE CABLE SUPPORT EVERY 3'-0" ON CENTER. CONTRACTOR SHALL SUPPLY SUPPORTS AS REQUIRED TO MEET THIS REQUIREMENT.
10. VERTICAL CONNECTIONS SHALL BE TAPED FROM THE BOTTOM UP SO OVERLAP MOVES WATER AWAY FROM CONNECTION (STEP 9).
11. PROVIDE HEAT SHRINK IN PLACE OF TAPE FOR QUAD POLES AND TMA'S. HEAT SHRINK SHALL BE "CANUSA" WITH ADHESIVE.



COAXIAL CABLE WEATHERPROOFING

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SEATTLE, WA 98115

MLA PARTNER:

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100% SIT / RETAIN CD'S, COMMENTS	04/13/2022	VF	0

SITE NAME:
VANDALS - SP03UB188

SITE NUMBER:
SP01591A

SITE ADDRESS:
964 NEZ PERCE DR
MOSCOW, ID 83844

SHEET DESCRIPTION:
RF DETAILS

SHEET NUMBER:
RF-1

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NOTE:
1. CD IS BASED ON RFDS VERSION: 1 DATED: 01/18/2021.

1/18/22, 12:12 PM SP01591A_Sprint Retain_1_draft_2022-01-18

Section 3 - Proposed Template Images

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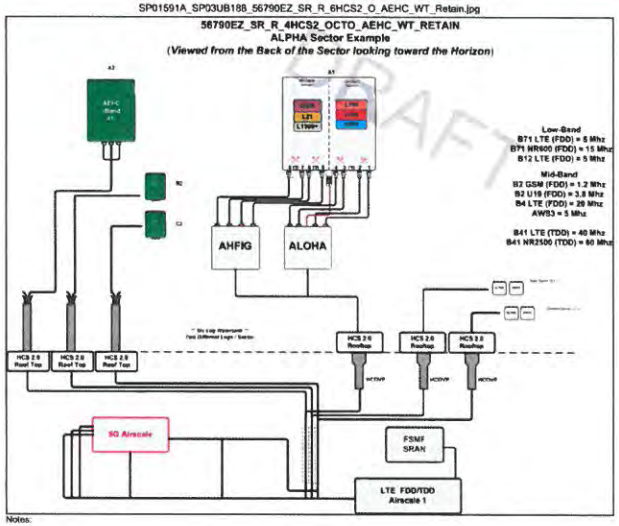

Notes:

https://rfds-prod-web-core-secure.geo.cf.t-mobile.com/DataSheet/Printout/c3499b5d-bdfb-45e7-9f79-68ca35af44c7?layoutId=674a6f10-708a-441e-ba... 2/9

LANDLORD SIGNATURE

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T Mobile
601 W. 1ST AVENUE
SPOKANE, WA 99201

PLANS PREPARED BY:
Technology Associates
SPOKANE MARKET OFFICE
9725 3RD AVENUE NE, STE. 410
SEATTLE, WA 98115

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VANDALS - SP03UB188

SITE NUMBER:
SP01591A

SITE ADDRESS:
964 NEZ PERCE DR
MOSCOW, ID 83844

SHEET DESCRIPTION:
RF DIAGRAM

SHEET NUMBER:
RF-2

RF DIAGRAM SCALE N.T.S. 1

UNIVERSITY OF IDAHO

SUBJECT

Public-Private Partnership (P3) Capital Improvement Approval – South Campus Chiller Replacement and Improvements

REFERENCE

November 2020	Public-Private Partnership Transaction for Utility Systems & Infrastructure
October 2021	South Campus Chiller Replacement and Improvements Project

APPLICABLE STATUTE, RULE, OR POLICY

Idaho State Board of Education Governing Policies & Procedures, Section V.K. Construction Projects

BACKGROUND/DISCUSSION

With the approval of the Board, the University of Idaho (UI) has executed a Long-Term Lease and Concession Agreement (Concession Agreement) under which the University received an up-front payment in the amount of $225,000,000 in exchange for the UI leasing its Utility System assets and operation to Sacyr Plenary Utility Partners Idaho LLC (SPUPI), the Concessionaire. As discussed with the Board at the time the Concession Agreement was under consideration for approval, the Concessionaire will develop and propose a rolling annual Five-Year Plan for UI review and approval. Among other things, the Five-Year Plan must include proposed Capital Improvements for the UI's Utility System. Proposed Capital Improvements must address the ongoing needs of the system for major repairs and system upgrades and possible expansions, for the fifty-year term of the Concession Agreement.

UI seeks approval for the proposed replacement and improvement of two south campus chillers and associated electrical and metering systems for $3,868,994. Both existing 500-ton SmardT chillers are failed and will be replaced with two new York Chillers to restore the south campus chilled water plant to its full original rated chilled water capacity. The Board approved an initial version of this project in October 2021. However, that project did not address all of the capacity needs and has been rescoped to meet overall needs and yield economies of scale during construction by addressing failures and capacity needs at the same time.

IMPACT

The goal of this project is to ensure that the campus chilled water supply meets the full original design capability at all times. High daily temperatures and the diminished capacity of the current south campus chilled water plant have necessitated the implementation of a load-shedding procedures to limit chilled water consumption during summer months, decreasing cooling capabilities across

UI's Moscow campus. Load shedding events necessitate shutting down building comfort cooling in order to prioritize other critical cooling needs, such as data centers and freezers. The restored capacity will allow UI to continue to cool campus facilities during summer months while protecting critical loads. In addition, the installation of more efficient chillers will reduce chiller electricity consumption by over 20%.

SPUPI will provide the up-front funding to execute the project, with the UI repaying the up-front cost over time according to the formula contained in the Concession Agreement. Further, if approved by the Board, SPUPI would be responsible for all aspects of the project, from planning, to execution, to completion. The Capital Expenditure Fee for this Capital Improvement will amortize the Capital Improvement and return over a 20-year period at 6.627% return on capital. Funds to repay the cost of the Capital Improvement come from operating funds previously used to operate and improve the utility system.

ATTACHMENTS

Attachment 1 – SCCP Chiller Replacement and Improvements Project Sheet and Load shedding Protocols

BOARD STAFF COMMENTS AND RECOMMENDATIONS

This action aligns with the University of Idaho's utility lease agreement and Board Policy V.K. regarding Board approval for projects over $1 million.

Staff recommends approval.

BOARD ACTION

I move to approve the request by the University of Idaho for the proposed replacement and improvement of two south campus chillers and associated electrical and metering systems for $3,868,994.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

University of Idaho

Chilled Water Load Shedding

Standard Operating Procedures

2020

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Contents

Introduction 2
Background 2
Chilled Water Production 2
Campus Cooling Loads 3
Load Shedding Phases 3
Phase 1 3
Phase 2 3
Phase 3 3
Critical Cooling Loads 4
Procedures 4
Step 1: Identify When Load Shedding is Needed 4
Step 2: Begin Load Shedding 4
Step 3: Communicate with Campus 6
Step 4: Monitor Chilled Water Production and Critical Loads 6
Step 5: Preventing Future Load Shedding 7
Appendix A: Key UES and HVAC Personnel 8
Utilities and Engineering Services 8
HVAC and Refrigeration 8
Appendix B 9
Stage 1 Load Shedding List 9
Stage 2 Load Shedding List 12
Stage 3 Load Shedding List 13
Critical Loads 14

DRAFT

Introduction

In 2020 the University of Idaho began load shedding chilled water consumption on campus when building cooling demands exceeded the ability for the District Energy Plant to produce chilled water. Chilled water is used for a range of needs from comfort cooling in offices to heat rejection in research applications and IT servers. Some of these cooling loads are less critical than others for continued business operations and thus each load on campus has been assigned a load shedding priority level. Without this practice severe damage may occur to equipment across campus while low priority loads would lose cooling anyways.

Successful load shedding requires significant coordination between Utilities and Engineering Services (UES), who operate the District Energy Network, and the Building Trades HVAC department, who operate HVAC systems across all campus buildings. This document provides a detailed outline on chilled water capacity and existing building loads, when chilled water load shedding is required, what areas will be impacted, and the steps necessary for implementation. Furthermore, information needs to be conveyed to building occupants in a timely matter to minimize disruptions and monitor critical areas.

Background

Chilled Water Production

Chilled water is produced at two main locations on campus. The North Campus Chiller Plant (NCCP) has one operational absorber with one additional absorber scheduled for operation in 2021. The South Campus Chiller Plant (SCCP) has three electric centrifugal chillers and a two million gallon thermal energy storage tank (TES). Equipment specifications are outlined in Table 1. The total rated capacity of the system, excluding the TES tank, is 2,820 tons, but due to degrading performance of the chillers and cooling towers over time the typical capacity averages 2,030 tons.

Table 1. Central Chilled Water Equipment Specifications.

Chiller Manufacturer	Type	Rated Capacity (tons)	Average Performance (tons)
NCCP			
Carrier	Single effect absorption	620	300
Trane (not operational)	Single effect absorption	n/a	unknown
SCCP			
SmardT	Centrifugal	500	330
SmardT	Centrifugal	500	200
York	Centrifugal	1200	1200
Total Capacity		**2,820 tons**	**2,030**

The TES tank can hold 20,000 ton-hours of cooling when fully charged and can discharge at a rate of 2,167 tons/hr. The system is operated such that chillers run at night to charge the TES tank while the TES tank is discharged in the day to handle fluctuated cooling loads. By operating this way, the university avoids peak demand charges from the utility and chillers can operate at their steady optimum point instead of chasing loads throughout the day. The absorption chiller however is base loaded 24/7 during the cooling season. Chilled water is supplied at 44°F and typically returns from campus at 55°F.

When very hot days are forecasted it is paramount that the TES is fully charged the night before. If temperatures are too hot at night and building HVAC systems are still cooling campus, then the tank will not have enough cooling energy stored to meet campus demands. If the TES tank is depleted then there will not be enough production capacity to meet campus loads, which triggers the need for load shedding.

Campus Cooling Loads

Thirty-seven buildings on campus are connected to the central chilled water network. Encompassing over 120 years of construction, each building has a very different building envelope and thermal characteristics. Many of the older buildings must be cooled at night beyond what a modern building would require, otherwise they may never reach setpoint temperature when occupied. That is most likely to occur during heat waves.

Cooling is mostly needed for thermal comfort to building occupants, with peak cooling season between July and September. However, there is still a yearlong need to satisfy process cooling loads on campus. These include research applications on campus where energy intensive equipment needs to be cooled as well as IT servers across campus. If such equipment does not receive enough chilled water extensive damage will occur. To prevent damage the equipment is shut down before certain temperatures are reached, interrupting both research and business operations.

Load Shedding Phases

Multiple phases have been established for load shedding, depending on how severe the need to reduce the load is. These phases were established based on the HVAC control system used and usage in the relevant area. Load shedding begins at Phase 1. If the campus cooling load is still greater than production capacity, then load shedding moves to Phase 2. This is repeated for Phase 3. The previous phase continues as load shedding increases (i.e. Phase 3 includes both Phase 1 and 2). The list of buildings impacted are outlined in the following sections. Specific points are identified in Appendix B for operators.

Phase 1

Phase 1 load shedding begins when UES determines that the TES tank will be depleted before 4 p.m. on a given day due to campus chilled water consumption outpacing production. Selected areas have Siemens controls and HVAC systems with return air, which helps slow the impact to occupants. These are comfort cooling loads in non-critical areas such as campus housing, offices, and classrooms.

Phase 2

If demand continues to exceed capacity, Phase 2 load shedding begins. These buildings have ATS controls and may or may not have return air systems.

Phase 3

If chilled water production cannot meet demand despite Phase 1 and 2 load shedding, Phase 3 begins. While never implemented on campus as of 2002, this would likely occur if there was a significant reduction in capacity, such as from major equipment failures during extended hot temperatures. All comfort cooling on campus is stopped at this stage, including classrooms, research labs, offices, and housing.

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Critical Cooling Loads

Identified critical loads will not be shed, even after Phase 3. These include ITS servers, supercomputers, refrigeration equipment for food storage, fisheries, and other process cooling loads. While typically monitored by HVAC and the respective users, extra attention should be given to these areas when load shedding begins.

Procedures

Step 1: Identify When Load Shedding is Needed

It's helpful for operators to be able to recognize conditions that may lead to load shedding. Weather conditions are the most likely cause, however certain equipment operating conditions should be monitored by UES. A single event may not require load shedding, but when multiple events occur together, especially on hot days, the likelihood for load shedding increases. Examples of events that can trigger load shedding are listed below:

1) Forecasted weather conditions for the day show a dry bulb temperature above 90 °F and a relative humidity above 40%.
2) Temperatures over 90 °F the previous day, followed by unusually warm temperatures at night, leading to the TES tank thermocline level to drop below 30 ft by 9 a.m.
3) The TES tank is already discharging (depleting) at 9 a.m.
4) The TES tank is predicted to be fully depleted before 4 p.m. on a given day. This is measured from the TES discharge rate and current thermocline level.
5) If the condenser approach temperature on a given chiller is above 14 °F.
    a. The approach temperature is the difference between liquid refrigerant temperature as measured on the liquid line, and leaving condenser water temperature
    b. The liquid refrigerant temperature is not trended, but should be monitored daily at the SCCP to assess long term performance
6) Planned or unplanned outages on major chilled water equipment such as chillers, pumps, or cooling towers.

The District Energy Plant will typically be the first ones to recognize when load shedding is needed. The most effective way to avoid load shedding is to assure the TES is fully charged every night, especially when temperatures are high. If high temperatures are expected the next day, chillers should be brought online until the TES tank begins recharging overnight.

Step 2: Begin Load Shedding

If UES determines that load shedding is needed, they will first communicate with HVAC to establish what time to begin. If UES determines that there is enough capacity to reach 4 p.m. before the TES tank is depleted, then load shedding should begin as late as possible. This reduces the impact to campus occupants as many employees leave at 5 p.m. and most classes are over.

DRAFT

Once UES and HVAC agree to load shed and a set time is established, HVAC personnel will begin load shedding the points established in the corresponding phase, listed in Appendix B. Specific steps are outlined below:

1) Phase 1
    a. Open the "CHW Shed 1st Stage" report in Siemens (see Figure 1 below)
    b. Close CHW valves to all control points listed
    c. Located on the main screen of the Siemens system, put the following points in Operator "ON" mode. This will configure all air handlers to 100% recycled building air via code:
        i. 009.032.UI80ED.CAMPUS RECIRC
        ii. BACnet CAMPUS EMER AIR RECIRC
2) Phase 2
    a. Access and close all CHW valves to control points through the ATS control system. The operator will need to navigate to each point separately
3) Phase 3
    a. Open the "CHW Shed 3rd Stage" report in Siemens
    b. Close CHW valves to all control points listed

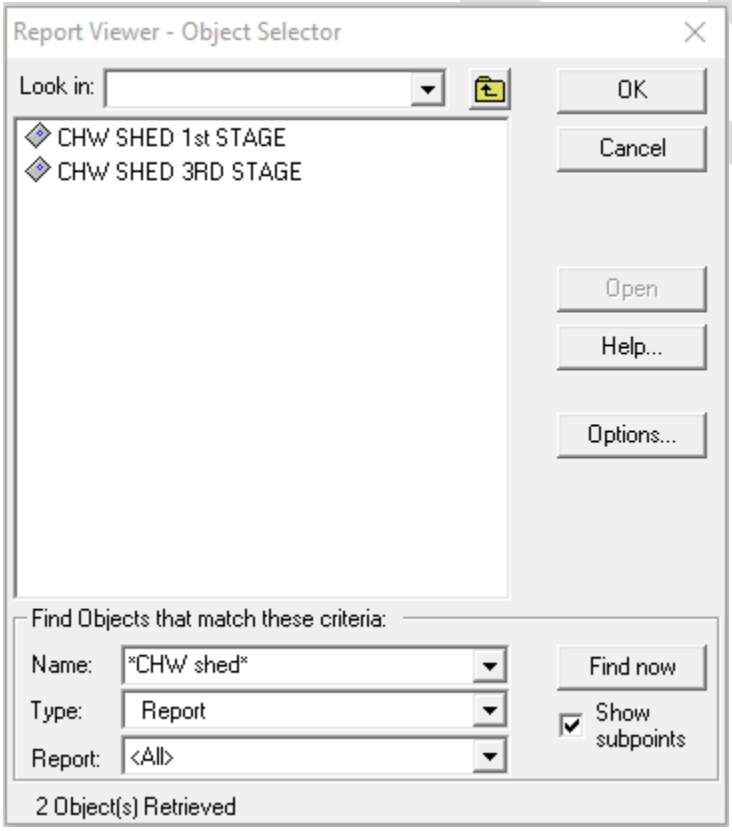

Figure 1. Chilled water load shedding phases in Siemens Insight Report Viewer.

Step 3: Communicate with Campus

UES will communicate with the broader campus that load shedding has begun. An email list of key campus occupants is maintained by the UES Director for any utilities related notifications. The ongoing email chain titled “Utility Infrastructure Maintenance and Shutdowns” will be used to quickly get the message out. The following order will be used to determine the responsible party for delivering the email. If the first person is unavailable, responsibility will shift to the next in line.

1) Director of UES – Gene Gussenhoven
2) Mechanical Systems Engineer – Marc Compton
3) Energy Plant Manager – Scott Smith
4) HVAC Supervisor – Keven Hattenburg
5) Facilities Management Customer Service Representative – Chuck Hatfield

Any phone calls or emails from campus occupants should be directed to the main Facilities Management Office, where the Customer Service Representative at the front desk can answer high level questions or direct them to the corresponding office as needed.

Step 4: Monitor Chilled Water Production and Critical Loads

UES will monitor TES tank thermocline levels during each phase to assess if the tank is still depleting after thirty minutes. If so, then the next phase of load shedding will begin. Energy Plant personnel will begin inspections at this step to assure equipment is operating as designed. Figure 2 shows the Campus Chilled Water summary screen in the ATS control system. This can be used to monitor OAT, chiller tonnage, and TES tank thermocline levels in real time.

Figure 2. Campus chilled water summary in ATS.

HVAC will monitor shed points and critical areas on campus. Temperatures in shed areas should begin increasing without access to chilled water. If not, personnel should investigate the corresponding equipment/controls to assure chilled water has been shut off. Critical areas may begin to heat up as the building spaces around them loses cooling. Temperatures in these areas will be closely monitored and corrective actions taken as needed, with priority given to these loads over others on campus.

Step 5: Preventing Future Load Shedding

Data should be trended and stored before and after load shedding to help prevent future events. Key data points include:

1) Outside air temperature
2) Outside air relative humidity
3) Outside air wet bulb temperature
4) TES tank thermocline level
5) TES tank supply/return temperatures
6) Individual chiller tonnage
7) Individual chiller condenser inlet/outlet temperatures
8) Building chilled water ton-hour consumption

This can be used to better understand what events are likely to trigger load shedding and if/when additional capacity is needed. Depending on how the TES tank performs, modifications can be made such as adding additional load shedding phases or shifting loads between phases. This might be needed if the TES tank discharges at one phase, but recharges extremely quickly at the next phase. Another example would be if a high temperature day is followed by a hot night that would likely deplete the tank in the morning, steps may be taken to load shed that night to “ride out” the upcoming day with the TES tank.

Regardless of daily operations, the single most effective method of preventing load shedding is to charge the TES tank to its full capacity every night. Steam Plant personnel should be monitoring the TES tank at regular intervals at night, especially during the cooling season.

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Appendix A: Key UES and HVAC Personnel

Utilities and Engineering Services

- Eugene Gussenhoven
  - Director of Utilities and Engineering Services
  - Email: eugeneg@uidaho.edu
  - Phone: 208-885-0141
- Scott Smith
  - Energy Plant Manager
  - Email: scsmith@uidaho.edu
  - Phone: 208-885-6271
- Marc Compton
  - Mechanical Engineer
  - Email: compton@uidaho.edu
  - Phone: 208-885-7350
- Ben Tucker
  - Chilled Water Systems Supervisor
  - Email: tucker@uidaho.edu
  - Phone: 208-885-6271

HVAC and Refrigeration

- Elaina Perry
  - Director of Building Trades
  - Email: elainam@uidaho.edu
  - Phone: 208-885-6683
- Keven Hattenburg
  - HVAC/Refrigeration Supervisor
  - Email: khattenburg@uidaho.edu
  - Phone: 208-885-6378
- HVAC and Refrigeration Office
  - Email: hvac@uidaho.edu
  - Phone: 208-885-6378

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Appendix B

Stage 1 Load Shedding List

Siemens Control Point	Building Name	Building Number	Equipment	Impacted Areas
001.068.AD18C5.FC RM18 CHW VLV	Admin. Bldg.	001	Fan Coil RM18	Room 18
001.068.AD52A5.FC2 RM10W VLV	Admin. Bldg.	001	Fan Coil RM10	Room 10
001.001.AD104 CWV	Admin. Bldg.	001	Fan Coil RM104	Room 104
001.068.AD52B5.FC1 RM10E VLV	Admin. Bldg.	001	Fan Coil RM10E	Room 10E
001.023.A01.AD01B6.CHWV VOUT	Admin. Bldg.	001	AHU-1	South Wing
001.001.CHW.AD53A5.CHWV VOUT	Admin. Bldg.	001	Pres. Office	President's Office
001.001.AD104E CWV	Admin. Bldg.	001	FC104E	Room 104E
005.001.FS01D1.AH1 CW VLV NC	Food Research	005	AHU-1	Room 105
014.032.A01.ML01E2.AH1 CHW VLV	Menard Law	014	AHU-1	Entire Building
018.001.CHW.RI50A7.VLVMINPOS	Ridenbaugh Hall	018	FC110, FC223, FC327	Rooms 110, 223, 327
019.026.LS10B6.AH5 CHW VLV	Life Science South	019	AHU-5	Rooms 250A, 251, 252, 253, 254, 255
025.042.AS01D2.CHWV OUT	Ag. Science	025	AHU-1	1st Floor 70's wing
LH01H5	LHSOM	026	AHU-1	Haddock Auditorium
LH02H5	LHSOM	026	AHU-2	Haddock Auditorium
LH03H5	LHSOM	026	AHU-3	Rehearsal Room 216
LH04H5	LHSOM	026	AHU-4	Restrooms
028.01.AH1.CCV	Janssen	028	AHU-1	Rooms 320, 324, 326, 326A, 326B, 340, 340A, 337, 339, 341, 343
028.02.AH2.CCV	Janssen	028	AHU-2	Rooms 220, 224, 226, 230, 232, 236, 240A, 240B, 240C, 221, 229A, 229, 233, 235A, 237, 241, 237A
028.03.AH4.CCV	Janssen	028	AHU-4	Floor Level 1
028.08.AH6.CCV	Janssen	028	AHU-6	Room 6
028.10.HRV.CCV	Janssen	028	HRV-1	Restrooms
030.001.HE50C1.CCHW.RET VALVE	Niccolls	030	ALL	Entire Building
032.003.A01.LA01CW.CHWV VOUT	Library	032	AHU-1, 2, 3, 4, 5, 6, 7	Levels 1, 2, 3, 4
032.018.A02.LA02CV.CHWV VOUT	Library	032	AHU-1, 2, 3, 4, 5, 6, 7	Levels 1, 2, 3, 4
032.018.A03.LA03CV.CHWV VOUT	Library	032	AHU-1, 2, 3, 4, 5, 6, 7	Levels 1, 2, 3, 4
032.AH4.CCV.VOUT	Library	032	AHU-1, 2, 3, 4, 5, 6, 7	Levels 1, 2, 3, 4
032.AH5.CCV.VOUT	Library	032	AHU-1, 2, 3, 4, 5, 6, 7	Levels 1, 2, 3, 4

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032.017.A06.LA06CV.CHWV VOUT	Library	032	AHU-1, 2, 3, 4, 5, 6, 7	Levels 1, 2, 3, 4
032.017.A07.LA07CV.CHWV VOUT	Library	032	AHU-1, 2, 3, 4, 5, 6, 7	Levels 1, 2, 3, 4
047.001.A01.RE07D3.CHWV VOUT	Renfrew	047	AHU-4	Level 1 North Side
047.AHU5.CCV	Renfrew	047	AHU-5	Room 111
047.AHU6.CCV	Renfrew	047	AHU-6	Room 112
054.AH1.CCV.VOUT	Buchanan	054	AHU-1, 2	Entire Building - except 329A
054.011.A02.BE03G2.AH2 CHW VLV	Buchanan	054	AHU-1, 2	Entire Building - except 329A
055.033.A01.FR01E3.CD CHWV OUT	Forestry	055	AHU-1, AHU-3	Entire Building
055.002.FR03C3.AH3 CHW VLV	Forestry	055	AHU-1, AHU-3	Entire Building
097.035.A01.CB01D3.CHWV VOUT	ISUB	097	AHU-1, 2, 3	Entire Building - except process cooling
097.034.A02.CB03E3.CHWV VOUT	ISUB	097	AHU-1, 2, 3	Entire Building - except process cooling
097.035.A03.CB05C3.CHWV VOUT	ISUB	097	AHU-1, 2, 3	Entire Building - except process cooling
111.016.AC1.EP05F3.CHWV VOUT	Engineering Physics	111	AC1	Rooms 112ABC, 115F, 115G, 117, 117A, 118, 119, 120, 122
143.019.A01.RC01B6.CHWV VOUT	Student Rec. Center	143	AHU-1	First Floor Locker Room Area
143.019.A02.RC03B6.CHWV VOUT	Student Rec. Center	143	AHU-2	2nd Floor Offices
143.021.A03.RC05B6.CHWV VOUT	Student Rec. Center	143	AHU-3	MAC Court
143.022.A04.RC07B6.CHWV VOUT	Student Rec. Center	143	AHU-4	Climbing Wall
550.054.A01.WC01E2.CHWV VOUT	Wallace	550	AHU-1, 2, 3, 4, 5, 6, 7, 10, 12, 13, AC-1	Entire Building – excluding wings
550.054.A02.WC03E2.CHWV VOUT	Wallace	550	AHU-1, 2, 3, 4, 5, 6, 7, 10, 12, 13, AC-1	Entire Building – excluding wings
550.055.A03.WC05E2.CHWV VOUT	Wallace	550	AHU-1, 2, 3, 4, 5, 6, 7, 10, 12, 13, AC-1	Entire Building – excluding wings
550.053.A04.WC07E4.CHWV VOUT	Wallace	550	AHU-1, 2, 3, 4, 5, 6, 7, 10, 12, 13, AC-1	Entire Building – excluding wings
550.053.A05.WC09E2.CHWV VOUT	Wallace	550	AHU-1, 2, 3, 4, 5, 6, 7, 10, 12, 13, AC-1	Entire Building – excluding wings

DRAFT

550.055.A06.WC11E2.CHWV VOUT	Wallace	550	AHU-1, 2, 3, 4, 5, 6, 7, 10, 12, 13, AC-1	Entire Building – excluding wings
550.054.A07.WC13E2.CHWV VOUT	Wallace	550	AHU-1, 2, 3, 4, 5, 6, 7, 10, 12, 13, AC-1	Entire Building – excluding wings
550.056.A10.WC17E2.CHWV VOUT	Wallace	550	AHU-1, 2, 3, 4, 5, 6, 7, 10, 12, 13, AC-1	Entire Building – excluding wings
550.057.A12.WC21E2.CHWV VOUT	Wallace	550	AHU-1, 2, 3, 4, 5, 6, 7, 10, 12, 13, AC-1	Entire Building – excluding wings
550.055.A13.WC19E2.CHWV VOUT	Wallace	550	AHU-1, 2, 3, 4, 5, 6, 7, 10, 12, 13, AC-1	Entire Building – excluding wings
550.055.AC1.WC15E2.CHWV VOUT	Wallace	550	AHU-1, 2, 3, 4, 5, 6, 7, 10, 12, 13, AC-1	Entire Building – excluding wings
678.001.A01.TL01B6.CHWV VOUT	TLC	678	AHU-1, 2, 3	Entire Building – except FC8 in Rm 051
678.002.A02.TL03B6.CHWV VOUT	TLC	678	AHU-1, 2, 3	Entire Building – except FC8 in Rm 051
678.002.A03.TL05B6.CHWV VOUT	TLC	678	AHU-1, 2, 3	Entire Building – except FC8 in Rm 051
678.001.FC7.TL09B8.CHWV VOUT	TLC	678	FC-7	Room 050
678.002.FC1.TL07B8.CHWV VOUT	TLC	678	FC-1	Entry
770.004.AHU2A.CCV	IRIC	770	AHU-2A, 2B	South Side of Building
770.004.AHU2B.CCV	IRIC	770	AHU-2A, 2B	South Side of Building
770.001.RME11.FCU1-5.CCV	IRIC	770	FCU1.5	ME11
770.001.FCU1-6:VLV 1 COMD	IRIC	770	FCU1.6	West Stair
770.003.FCU3-2:VLV 1 COMD	IRIC	770	FCU3.2	West Stair
770.003.FCU3-3:VLV 1 COMD	IRIC	770	FCU3.3	East Stair
700.004.FCU4-1:AOV2	IRIC	770	FCU4.1	Penthouse
770.004.FCU4-2:AOV2	IRIC	770	FCU4.2	Penthouse
770.004.FCU4-3:AOV2	IRIC	770	FCU4.3	Penthouse
770.004.FCU4-4:AOV2	IRIC	770	FCU4.4	Penthouse

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Stage 2 Load Shedding List

ATS Control Point	Building Name	Building Number	Equipment	Impacted Areas
AO-1	Phinney	004	AHU-1	Polya Lab
AO-1	Phinney	004	FC-1	Polya Computer Lab
AO-1	Pitman Center	020	AHU-1	Basement North
AO-1	Pitman Center	020	AHU-2	Basement North and 1st Floor North
AO-1	Pitman Center	020	AHU-15	Basement South
AO-1	Pitman Center	020	Old AHU-1	1st Floor South
AO-1	Pitman Center	020	AHU-14	Borah Theater
AO-1	Pitman Center	020	AHU-10	International Ballroom
AO-1	Pitman Center	020	AHU-11	International Ballroom
AO-1	Pitman Center	020	AHU-3	1st Floor South
AO-1	Pitman Center	020	AHU-4	Basement Video Production
AO-1	Pitman Center	020	AHU-9	2nd Floor Hallway
AO-1	College of Business & Econ.	424	AHU-1	Level 1, 2, 3
AO-1	College of Business & Econ.	424	AHU-2	Basement Level
Chilled Water Mains in Bldg 8	Living Learning Center	542	Fan Coils	Buildings 1, 2, 3, 4, 5, 6, 7, 8
AO-1	College of Education	835	AHU-1	Entire Building

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Stage 3 Load Shedding List

Siemens Control Point	Building Name	Building Number	Equipment	Impacted Areas
009.052.A02.GB03B5.CHWV OUT	Gibb Hall	009	AHU-2	Level 1, 2
009.052.A03.GB05B5.CHWV OUT	Gibb Hall	009	AHU-3	Level 1, 2
019.001.A06.LS06B5.CHWV VOUT	Life Science South	019	AHU-6	Level 1 East End
019.001.A06.LS06B5.CHWV VOUT	Life Science South	019	AHU-6	Level 1 East End
019.001.A07.LS07B5.NC CHW 0-10	Life Science South	019	AHU-7	Level 2 East End
019.002.A08.LS08B5.CHWV VOUT	Life Science South	019	AHU-8	Level 3 East End
019.026.A11.LS21D3.CHWV VOUT	Life Science South	019	AHU-11	Level 1, 2 West End
019.003.A12.LS12B5.CHWV VOUT	Life Science South	019	AHU-12	Level 3 West End
019.003.FC1/2.LS52A6.CHWV VOUT	Life Science South	019	FC1, FC2	456A, 458A, 458C, 458D
025.001.A08.AS08B5.CHWV VOUT	Ag. Science	025	AHU-8	North End 1st Floor 50's wing
025.001.A09.AS09B9.CHWV VOUT	Ag. Science	025	AHU-9	South End 1st Floor 50's wing
047.002.A02.RE03D3.CHWV VOUT	Renfrew	047	AHU-2	1st Level SW End
047.002.A03.RE05D3.CHWV VOUT	Renfrew	047	AHU-3	1st Level NW End
047.008.A04.RE07D3.CHWV VOUT	Renfrew	047	AHU-4	1st Level East End
047.003.A07.RE13D3.CHWV VOUT	Renfrew	047	AHU-7	2nd Level SW End
047.003.A08.RE15D3.CHWV VOUT	Renfrew	047	AHU-8	2nd Level NW End
047.004.A09.RE17D3.CHWV VOUT	Renfrew	047	AHU-9	2nd Level NE End
047.004.A10.RE19D3.CHWV VOUT	Renfrew	047	AHU-10	2nd Level SE End
047.005.A11.RE21D3.CHWV VOUT	Renfrew	047	AHU-11	3rd Level SW End
047.005.A12.RE23D3.CHWV VOUT	Renfrew	047	AHU-12	3rd Level NW End
047.006.A13.RE25D3.CHWV VOUT	Renfrew	047	AHU-13	3rd Level NE End
047.006.A14.RE27D3.CHWV VOUT	Renfrew	047	AHU-14	3rd Level SE End
110.05.AH2.CCV	McClure	110	AHU-2	Level 1, 2, 3, 4
110.02.AH3.CCV	McClure	110	AHU-3	Level 1, 2, 3, 4
110.03.AH4.CCV	McClure	110	AHU-4	Level 1, 2, 3, 4
111.017.A02.EP03F3.CHWV VOUT	Engineering Physics	111	AHU-2	Level 1, 3 N Wing
111.017.EP01F3.AH1 CHWV V0UT	Engineering Physics	111	AHU-1	Level 2, 3 SE Wing
422.043.A01.AB01B6.CHWV VOUT	Ag. Biotech.	422	AHU-1	Level 1, 2, 3 W End
422.044.A02.AB03B6.CHWV VOUT	Ag. Biotech.	422	AHU-2	Level 1, 2, 3 E End
422.045.A03.AB05B6.CHWV VOUT	Ag. Biotech.	422	AHU-3	Level 3 Old BL3 Lab
423.039.A01.GJ01B6.CHWV VOUT	Gauss Johnson	423	AHU-1	Level 1, 2, 3 W End
423.040.A02.GJ03B6.CHWV VOUT	Gauss Johnson	423	AHU-2	Level B All, Level 1, 2 E End
770.004.AHU1.CCV	IRIC	770	AHU-1	Level 1,2, 3 N End Labs

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Critical Loads

Siemens Control Point	Building Name	Building Number	Equipment	Impacted Areas
001.068.HX1.AD50B1.CHWV	Admin	001	HX	NOC Room 129, 130
001.023.FC1.AD07E2.CHWV VOUT	Admin	001	FC-1	Room 210
001.023.FC2.AD08E2.CHWV VOUT	Admin	001	FC-2	Room 210
009.053.A04.GB07D3.CHWV VOUT	Gibb Hall	009	AHU-4	North LARF
009.052.A01.GB01B5.CHWV OUT	Gibb Hall	009	AHU-1	South LARF
009.040.COND.GB53B1.BYP VLV	Morrill/Gibb	009	HX	4th Floor Heat Pumps
009.040.CHW.GB54A5.RET VLV	Morrill/Gibb	009	HX	4th Floor Heat Pumps
019.026.HX1.LS51A7.CHW	Life Science South	019	HX	Process Cooling
025.001.HX1.AS52A7.CHWV CMD	Ag. Science	025	HX	Process Cooling
025.041.A03.AS05B6.CHWV VOUT	Ag. Science	025	AHU-3	Room 354
025.041.A03.AS05B6.CHWV	Ag. Science	025	AHU-4	Room 355
028.08.AH5.HCV.VOUT	Janssen	028	AHU-5	Ground Level South
028.05.FC2.2.RM211A.CCV	Janssen	028	FC2.2	Room 211A
028.05.FC2.3.RM211C.CCV	Janssen	028	FC2.3	Room 211C
028.05.FC2.4.RM211B.CCV	Janssen	028	FC2.4	Room 211B
028.06.FC3.1.RM331.CCV	Janssen	028	FCU3-1	Room 331
028.07.FC3.RM323.CCV	Janssen	028	323 FC-3	Room 323
028.07.FC2.RM323A.CCV	Janssen	028	323A FC-2	Room 323A
028.07.FC1.RM321.CCV	Janssen	028	321 FC-1	Room 321
032.004.FC1.LA09E2.CHWV	Library	032	420 IT Room	Room 420
032.AC1.CHWV	Library	032	AC-1	Server Room Basement
001.047.RE51V1.PCHW	Renfrew	047	HX	Process Cooling
054.001.F1.BEC01A.ACR329	Buchanan	054	Fan Coil 329	Room 329, 330
055.022A.FR51A4.CHW VLV	Forestry	055	HX	Fisheries
055.022A.FR53A5.FCHW	Forestry	055	HX	Fisheries
097.036.HX1.CB50C6.CHW	ISUB	097	HX - Coolers	Process Cooling
110.01.AC1.CCV	McClure	110	Liebert Unit	Beowulf 124
110.01.AC2.CCV	McClure	110	Liebert Unit	Beowulf 124
110.01.AC3.CCV	McClure	110	Liebert Unit	Beowulf 124
110.01.AC4.CCV	McClure	110	Liebert Unit	Beowulf 124
110.01.RM124.CHWV	McClure	110	Liebert Unit	Beowulf 124
110.013.F2.ERC90A.RM223A	McClure	110	Fan Coil 223A	223A
110.05.AH1.CCV	McClure	110	AHU-1	Beowulf 124
111.016.BLD.EP50A7.CHW	Engineering Physics	111	HX	Laser Room 302, 303
111.016.BLD.EP50B6.CHW	Engineering Physics	111	HX	Laser Room 302, 303
422.044.HX1.AB51A5.CHWV	Ag. Biotech.	422	HX	Process - Cooler Boxes
423.025.HX1.GJ50A2.PCHW	Gauss Johnson	423	HX	Process Cooling
550.056.CHW.WC50F4	Wallace	550	HX - Coolers	Process Cooling
678.001.FC7.TL09B8	TLC	678	Server Room	TLC RM 50, 51
678.001.FC8.TL08B8	TLC	678	Server Room	TLC RM 50, 51
770.004.CHW.CCV	IRIC	770	HX	Process Cooling

DRAFT

UNIVERSITY OF IDAHO

SUBJECT

Public-Private Partnership (P3) Capital Improvement Approval – Kibbie Dome Building Electrical Service Replacement

REFERENCE

November 2020 Public-Private Partnership Transaction for Utility Systems and Infrastructure

APPLICABLE STATUTE, RULE, OR POLICY

Idaho State Board of Education Governing Policies & Procedures, Section V.K. Construction Projects

BACKGROUND/DISCUSSION

With the approval of the Board, the University of Idaho (UI) has executed a Long Term Lease and Concession Agreement (Concession Agreement) under which the University received an up-front payment in the amount of $225,000,000 in exchange for the UI leasing its Utility System assets and operation to Sacyr Plenary Utility Partners Idaho LLC (SPUPI), the Concessionaire. As discussed with the Board at the time the Concession Agreement was under consideration for approval, the Concessionaire will develop and propose a rolling annual Five-Year Plan for UI review and approval. Among other things, the Five-Year Plan must include proposed Capital Improvements for the UI's Utility System. Proposed Capital Improvements must address the ongoing needs of the system for major repairs and system upgrades and possible expansions, for the 50-year term of the Concession Agreement.

UI seeks approval for the replacement and relocation of the north and south power transformers, decommissioning and removal of the north lighting transformer, and relocation of the south concourse transformer which was previously installed on an emergency basis, replacement of the associated electric switchgear, and addition of metering systems for $3,222,093. This work will include construction of a new transformer room on the north side of the Kibbie Dome and relocation of all three transformers to the newly constructed enclosure. Within the project, aging and unreliable switchgear will be replaced, and new metering will be added in order to meet campus sustainability goals and better manage electricity use.

IMPACT

The goal of this project is to increase the reliability of the Kibbie Dome electrical system to ensure that the facility will be available to the University community, avoiding catastrophic failure of aging 47-year-old transformers as has happened historically at Homecoming. The switchgear is not considered reliable and is a risk to operate. Upgrades will ensure that this switchgear meets modern standards and codes. The current location of the transformers on the north side of the building

obstructs ingress and egress for visitors to Kibbe Dome events and detracts from enjoyment of the facility. Relocation of the northside transformers will create a safer, more enjoyable experience for visitors while preventing unauthorized persons from accessing the transformers.

SPUPI will provide the up-front funding to execute the project, with the UI repaying the up-front cost over time according to the formula contained in the Concession Agreement. Further, if approved by the Board, SPUPI would be responsible for all aspects of the project, from planning, to execution, to completion. The Capital Expenditure Fee for this Capital Improvement will amortize the Capital Improvement and make a 6.627% return on capital over a 20-year period. Funds to repay the cost of the Capital Improvement come from operating funds previously used to operate and improve the utility system.

ATTACHMENTS

Attachment 1 – Kibbie Dome Building Electrical Service Replacement

BOARD STAFF COMMENTS AND RECOMMENDATIONS

This action aligns with the University of Idaho's utility lease agreement and Board Policy V.K. regarding Board approval for projects over $1 million.

Staff recommends approval.

BOARD ACTION

I move to approve the request by the University of Idaho for the replacement and relocation of the north and south power transformers, decommissioning and removal of the north lighting transformer, and relocation of the south concourse transformer which was previously installed on an emergency basis, replacement of the associated electric switchgear, and addition of metering systems for $3,222,093.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

CAPITAL IMPROVEMENT PROJECT SHEET – 23/3-027

PROJECT CODE: 23/3-027

PROJECT NAME: Kibbie Dome Building Electrical Service Replacement

UTILITY SYSTEM: Electric

DATE SUBMITTED: December 31st, 2021

SAFETY AND RESILIENCY ASSESSMENT:

The impact associated with safety is high (severe physical and life safety issue). The impact associated with resiliency is high (extended outage and building shutdown)

The likelihood of these events is high.

Likelihood	High	3	2	1
	Med	4	3	2
	Low	5	4	3
PHASE ASSIGNED		Low	Med	High
		Impact		

Background: These transformers are 47 years old and have no record of being tested. Recent failure and replacement of one of the transformers in October 2021 indicates imminent and unpredictable failure of others. Multiple safety and reliability concerns were identified during the emergency replacement. These conditions present a clear dangerous condition for personnel and building occupants while leaving property at significant risk of damage. There is significant risk to campus events scheduled including football games and graduation ceremonies. The main switch gear is beyond life and will require replacement at the same time.

Objectives: The main objectives of this Capital Improvement are:

- Upgrade electrical system of the Kibbie Dome to reduce risks to scheduled events.
- Mitigate a significant safety and resiliency issue.
- Modernize electrical distribution and metering.
- Achieve a safe arc flash condition.
- Implement required O&M for a safe and reliable operation.

Scope of Work: The scope of work of this Capital Improvement is:

- Construct new electrical rooms on the exterior of the Kibbie Dome's north and south concourses (x2).
- Doorway infills to match existing (x3).
- New 480V switchgear to consolidate systems at south concourse, demolition of north concourse switchgear.
- New 208V switchgear in north and south concourses.
- Refeed stadium lighting distribution panels from new 480V switchgear (x2).
- Replace and relocate 400A disconnect switch for road show power.
- Discontinue operations of the 1200 kVA pad mount transformer serving north Kibbie Dome Concourse and field lighting (13.2kV to 480V).
- Replace and relocate 225 kVA pad mount transformer serving north Kibbie Dome Concourse (13.2kV to 208V).
- Replace and relocate 1500 kVA pad mount transformer serving south Kibbie Dome Concourse and field lighting (13.2kV to 480V).
- Relocate 500 kVA pad mount transformer serving south concourse (13.2kV to 208V).
- Replace primary feeders to sectionalizer. Trenching, backfilling, patching included.

- Replace secondary feeders to Main Building Service for all three service points. Trenching, backfilling, patching inc.
- Install protective bollards in front of transformers.
- Install SEL-735 electric meters and ethernet cabling (x3).
- Install sumps pumps in electric vaults serving transformers (x2) and make repairs as needed.

Safety and Logistics: To the extent required by applicable law, the University will provide (i) an asbestos survey covering any area to be disturbed by a demolition or renovation work; or (ii) proof that the original work was completed using asbestos-free materials. In accordance with the Concession Agreement, the University will be responsible for abatement and disposal of any Hazardous Substances, including polychlorinated biphenyls, asbestos, and lead-based paint, which originated prior to Closing.

A detailed safety plan will be prepared around public sidewalk and street traffic (safety will need to be aware of and planned or public walk area). The equipment removal will occur through grated access at sidewalk level. Arc Flash PPE required.

The Concessionaire will coordinate with Kibbie Dome's event schedule for shutdowns.

Approach: As established in section 4.3(c), the Concessionaire requests that the University respond to this proposed Capital Improvement only pursuant to section 4.3(c)(ii), requiring that the Concessionaire perform additional work, to provide more information regarding the scope, design, and cost of the proposed Capital Improvement. The anticipated cost of such additional work is $126,684 and will also include (i) electric load evaluations to right size new transformers, (ii) the inspection of the electric vaults serving each transformer, (iii) architectural preliminary design for the new electrical rooms and door infills, and (iv) electrical redesign of 480V service.

Additional Information:

Figure 1. Example of oil leaking from transformer.

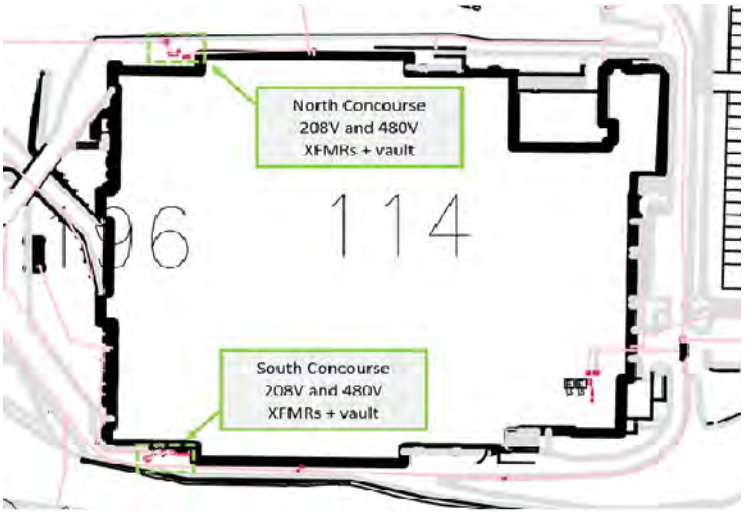


Figure 2. Electrical map of Kibbie Dome for reference.

CAPITAL IMPROVEMENT PROJECT SHEET – 23/3-027

Pursuant to the Long-term Lease and Concession Agreement, Section 4.3.(c) (2), the following information is presented for this Capital Improvement:

(A) Total Cost: $3,222,093.

(B) Forecasted annual operations and maintenance costs: +$400. The upgraded electric meters and new vault sumps will require additional O&M.

(C) Proposed modification to the Recovery Period: None.

(D) Explanation of all relevant assumptions, variables, and data sources: See previous narratives. In addition, it is assumed that (i) lead times for equipment is approx. 52 weeks, (ii) new transformers expected to be smaller and more efficient, dependent on the electrical load studies, (iii) work not included: no VFI switches nor appurtenances, no SEL 751s, no switch operators, no microgrid infrastructure, no temporary generator, (iv) underground construction conditions will be reasonably free of obstruction, conflict, or hazardous materials that could impede completion, (v) efforts will be made to mitigate impact on surrounding vegetation but impacts may occur and their remediation is not included in this scope, (vi) workable solutions for all required coordination with University activity will be achievable, and (vii) north and south concourses will not have power during construction. Coordination with University for other work that may impact this project will occur.

(E) Proposed schedule: EPC (Dev.) extends through April 2024. EPC (Const.) extends from May 2024 through August 2024. EPC (Commiss.) occurs in August 2024.

	08/22	09/22	10/22	11/22	12/22	01/23	02/23	03/23	04/23	05/23	06/23	07/23
Additional Work												
EPC (Dev.)												
EPC (Const.)												
EPC (Commiss.)												

(F) Impact on Sustainability: Improved through the increased electrical efficiency of the equipment and the mitigation of potential damages.

(G) Anticipated tax credits or other benefits: No tax credits or other benefits have been identified.

(H) Fee or charge payable to the Operator: $3,185,676.

(I) Proposed changes to the limits on the professional liability insurance coverage: All engineering and consulting firms engaged for Capital Improvements proposed for Approval will have a limit of $1,000,000 limit or greater on the professional liability insurance coverage. The premium associated to such policy is usually prorated by the firm over their annual contracts.

(J) Potential change in Supply Costs or consumption of Supplies: -$530, electricity. It is assumed a 1% improvement in electrical efficiency based on historic Kibbie Dome metering.

SUBJECT

College/University FY2022 audit findings reported by the Idaho State Board of Education's external auditor

APPLICABLE STATUTE, RULE OR POLICY

Idaho State Board of Education Governing Policies & Procedures, Section V.H.4.f.

BACKGROUND/DISCUSSION

The Idaho State Board of Education (Board) is in contract with CliftonLarsonAllen LLP, an independent certified public accounting firm, to conduct the annual financial audits of Boise State University, Idaho State University, the University of Idaho, and Lewis-Clark State College.

The financial audits for FY2022 were conducted in accordance with Generally Accepted Government Auditing Standards and include an auditor's opinion on the basic financial statements prepared by each of the four institutions.

IMPACT

There were no material weaknesses or significant deficiencies for any of the four institutions, and all received an unmodified opinion on the financial statements. The results of the single audit for BSU, ISU and LCSC are postponed due to a delay by the federal government in issuing the guidelines for auditing funds related to COVID-19. Pending that audit, there could be further items related to internal controls for federal expenditures addressed. University of Idaho did have their single audit report issued, and there were no findings.

ATTACHMENTS

Attachment 1 - CliftonLarsonAllen Audit Results Report

STAFF COMMENTS AND RECOMMENDATIONS

On December 6, 2022, CliftonLarsonAllen (CLA) staff reviewed their audit findings with members of the Audit Committee and Board staff. This was followed by presentations by senior managers from the college and universities on their financial statements.

The University of Idaho Foundation (a component unit reported in the University of Idaho's financial statements) continues to stay with Governmental Accounting Standards Board (GASB) presentation for their financial statements when CLA believes the Foundation should follow Financial Accounting Standards Board (FASB) presentation for FY 2023. CLA will continue to monitor this item for materiality.

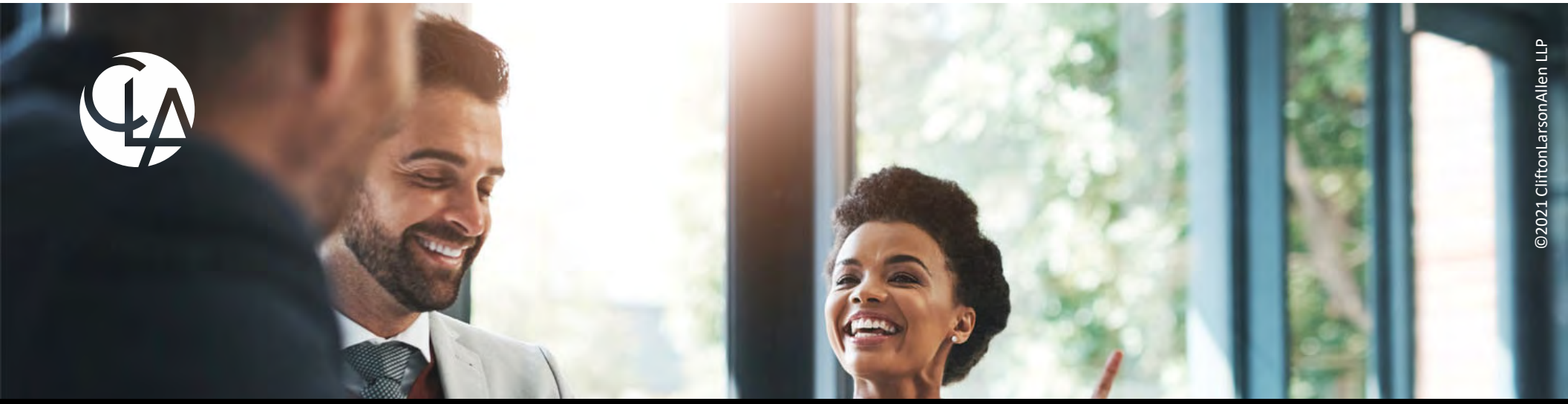
CLA indicated that each College and University was cooperative and helpful.

Staff recommends acceptance of the financial audit reports submitted by CliftonLarsonAllen.

BOARD ACTION

I move to accept from the Audit Committee the FY2022 financial audit reports for Boise State University, Idaho State University, University of Idaho, and Lewis-Clark State College, as submitted by CliftonLarsonAllen LLP in Attachment 1.

Moved by_____ Seconded by_____ Carried Yes_____ No_____



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Idaho Office of State Board of Education

Fiscal Year 2022

Financial Statement Audit Exit Conference

WEALTH ADVISORY | OUTSOURCING | AUDIT, TAX, AND CONSULTING

Investment advisory services are offered through CliftonLarsonAllen Wealth Advisors, LLC, an SEC-registered investment advisor

Agenda

- Introductions
- Responsibilities under GAAS
- Scope and Status of Related Deliverables
- Unique Audit Items for FY22
- Required communications
- Questions

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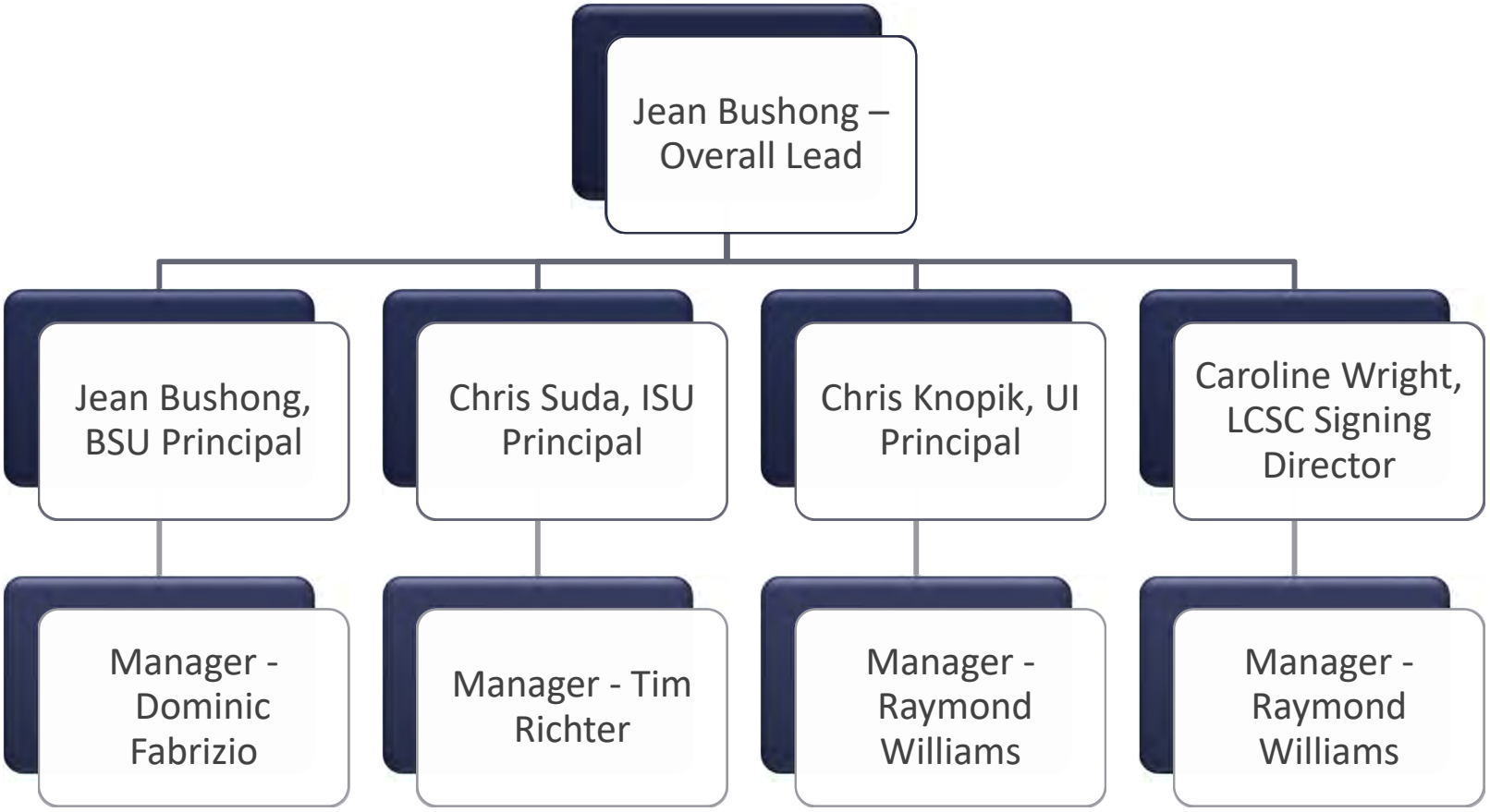
CLA Team



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Responsibilities under US Generally Accepted Auditing Standards (GAAS)

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Responsible for:

- Expressing an opinion on whether financial statements are in conformity with U.S. GAAP in all material respects.
- Expressing an opinion only over information identified in our report. Other information included will be reviewed, but not subject to testing.
- Performing audit in accordance with required auditing standards, including Government Auditing Standards

Responsibilities under GAAS (continued)

An audit in accordance with GAAS:

- Communication of significant matters related to audit, information required by regulations, or other information agreed upon with University.
- Does not relieve management of responsibilities.
- Includes consideration of internal control as basis for audit procedures; but not to opine on effectiveness of internal controls.

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Scope of Engagements

Financial Statement Audit

All 4 institutions

LCSC Foundation

Single Audit

All 4 institutions

NCAA Agreed Upon Procedures

Boise State

Idaho State

University of Idaho

Boise State Public Radio

Financial Statement Audit

CPB Filing

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Status of Financial Statement Audits

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Boise State University	Idaho State University	University of Idaho	Lewis-Clark State College
Final review; no anticipated changes	Issued	Issued	Final review; no anticipated changes

Unique Audit Items

- GASB Statement 87, Leases
- New suite of auditing standards
- Revenue Recognition: Higher Education Emergency Relief Funds
- Transition and turnover

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Financial Statement Audit

Independent Auditors' Reports

- Opinions – Unmodified
- Management's Responsibility
- Auditors' Responsibility
- References to Government Auditing Standards Report

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Internal Control Communications

Boise State University

- No material weaknesses or significant deficiencies noted
- Management Letter
- Verbal Communications

- HCM implementation – tested controls put in place by management to address implementation issues
- Adoption of IT change management policy
- Bank Reconciliation Timeliness
- Various other IT Observations

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Internal Control Communications

Idaho State University

No material weaknesses or significant deficiencies noted

No repeat internal control findings

Information Systems observations/recommendations

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Internal Control Communications

University of Idaho

No material weaknesses or significant deficiencies noted

MLC: GASB vs FASB presentation of Foundation

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Internal Control Communications

Lewis-Clark State College

No material weaknesses or significant deficiencies noted	Management letter to Foundation	Verbal observation – timely approval of Procurement Cards	Verbal observations - various IT suggestions

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Required Communications

Qualitative Aspects of Accounting Practices

- Accounting Policies, Accounting Estimates, and Financial Statement Disclosures

Difficulties Encountered in Performing the Audit

- None

Uncorrected Misstatements

- See slide

Corrected Misstatements

- See slide

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Required Communications (continued)

Disagreements with Management

- None

Management Representations

Management Consultations with other Independent Accountants

- None

Significant Issues Discussed with Management Prior to Engagement

- None

Other Matters

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Uncorrected Misstatements

University of Idaho	• Foundation's GASB Presentation ($2.6 million)
LCSC	• Impact of GASB 84 (Increase to Net Position for $127,948)

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Questions?

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Other Communications

Management and staff were very cooperative and helpful

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WEALTH ADVISORY | OUTSOURCING | AUDIT, TAX, AND CONSULTING

Investment advisory services are offered through CliftonLarsonAllen Wealth Advisors, LLC, an SEC-registered investment advisor

SUBJECT

General Education Matriculation (GEM) Committee Appointments

REFERENCE

June 2016	The Board appointed Jana McCurdy (CWI), Dr. Margaret Johnson (ISU), and Kenton Bird (UI) to the GEM Committee.
December 2016	The Board appointed Dr. Joanne Tokle (ISU) and John Bieter (BSU) to the GEM Committee.
August 2017	The Board appointed Lori Barber, representing CEI, to the GEM Committee.
October 2017	The Board appointed Cher Hendricks, representing UI, to the GEM Committee.
April 2019	The Board appointed Dean Panttaja representing UI, and Whitney Smith-Schuler representing CSI to the GEM Committee.
June 2019	The Board appointed Greg Wilson representing CWI, replacing Jana McCurdy to the GEM Committee.
October 2019	The Board appointed Tiffany Seeley-Case representing CSI, replacing Whitney Smith-Schuler to the GEM Committee.
June 2020	The Board appointed Martin Gibbs representing LCSC, replacing Mary Flores to the GEM Committee.
June 2021	The Board appointed Cindy Hill representing ISU and Angela Sackett-Smith representing CEI to the GEM Committee.
August 2021	The Board appointed Candyce Reynolds representing BSU and Lloyd Duman representing NIC to the GEM Committee.
October 2021	The Board appointed Karina Smith representing dual credit, Kristin Whitman open education, and Debbie Ronneburg representing the Technical College Leadership Council.
April 2022	The Board appointed Sherry Simkins representing NIC and Ryan Randall representing open education.
August 2022	The Board appointed Karen Appleby representing ISU to the GEM Committee.

APPLICABLE STATUTE, RULE, OR POLICY

Governing Policies and Procedures section III.N. General Education

BACKGROUND/DISCUSSION

Consistent with Board Policy III.N, the state General Education Matriculation Committee is responsible for reviewing the competencies and rubrics of the general education framework for each institution to ensure its alignment with the Association of American Colleges and Universities (AAC&U) Essential Learning

Outcomes. Board Policy III.N also provides that faculty discipline groups have ongoing responsibilities for ensuring consistency and relevance of General Education competencies related to their discipline. The GEM Committee consists of a representative from each Idaho public postsecondary institution appointed by the Board; a representative from the Division of Career Technical Education; a representative from the Idaho Registrars Council as an ex-officio member; a representative from the digital learning community; a representative from the dual credit community, a representative from the open education community; and the Executive Director or designee of the Office of the State Board of Education, who serves as chair to the committee.

The open education community has nominated Dr. Ann Abbott (UI) for appointment to the GEM Committee to replace Ryan Randall, who requested to step off the committee in October. The digital learning community has nominated Ryan Faulkner (CEI) to replace Chris Harper, who requested to step off the committee in November.

IMPACT

The proposed appointments replace the open education community representative and the digital learning representative on the GEM Committee.

ATTACHMENTS

Attachment 1 – Current GEM Committee Membership

BOARD STAFF COMMENTS AND RECOMMENDATIONS

Dr. Ann Abbott has taught Mathematics and Statistics at UI for many years with a 10-year break while she continued to teach applied statistics for professionals in her capacity as Forest Biometrician in Forest Service Research. She became Director of Introductory Mathematics at UI in 2021 having served as Interim Director for 18 months. Dr. Abbott first came to UI in 1993 as a graduate student in the Fish and Wildlife program. During this time, she added a graduate degree in Statistics and later a PhD in Forest Biometrics. The enduring passion for helping students find value in general education resulted in the return to UI.

Dr. Ryan Faulkner was recruited and subsequently hired in January 2018 as Director of Online Learning to develop an online program for the newly formed College of Eastern Idaho (CEI), formerly Eastern Idaho Technical College. As the program grew, his team expanded and he was promoted to Dean in 2021. Prior to his time at CEI, Dr. Faulkner worked 17 years for the Idaho State University Educational Technology Services department as a videoconference manager, technology equipment specialist, and instructional technologist. Dr. Faulkner also teaches organizational leadership for the CEI business program.

Board staff recommends approval.

BOARD ACTION

I move to appoint Dr. Ann Abbott, representing the open education community, and Ryan Faulkner, representing the digital learning community, to the General Education Matriculation Committee, effective immediately.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

State Board of Education
General Education Matriculation Committee

Dean Panttaja is the Director of General Education & Assessment. Dean Panttaja was appointed in **April, 2019.**

Greg Wilson is the General Education Coordinator at College of Western Idaho. Greg Wilson was appointed in **June, 2019.**

Tiffany Seeley-Case is the Dean of General and Transfer Education at College of Southern Idaho. Tiffany Seeley-Case was appointed in **October, 2019**

Martin Gibbs is the Dean of Liberal Arts & Sciences at Lewis-Clark State College. Martin Gibbs was appointed in **June, 2020.**

Angela Sackett-Smith is the Dean for General Education at College of Eastern Idaho. Angela Sackett-Smith was appointed in **June, 2021.**

Candyce Reynolds is the Director of the Foundational Studies Program at Boise State University was appointed in **August, 2021**.

Karina Smith is the Assistant Director for Concurrent Enrollment at Boise State University and serves as the dual credit representative on the GEM Committee. She was appointed in **October, 2021**.

Debbie Ronneburg is the interim Dean, College of Technology at Idaho State University and serves as the Technical College Leadership Council Representative on the GEM Committee. She was appointed in **October, 2021**.

Sherry Simkins is the Dean of Instruction, General Studies at North Idaho College. She was appointed **April, 2022**.

Karen Appleby is the Vice Provost for Faculty Success and Instruction at Idaho State University. She was appointed August, 2022.

Mandy Nelson is the Registrar at Boise State University, a representative from the Idaho Registrars Council, as an ex officio member.

Ann Abbott is the Program Director of Mathematics and Statistical Science at University of Idaho, and will serve as the open education representative on the GEM Committee. **Appointment pending Board approval December, 2022.**

Ryan Faulkner is the Dean of Online Learning at College of Eastern Idaho, and will serve as the digital learning representative on the GEM Committee. **Appointment pending Board approval December, 2022.**

Heidi Estrem is the Associate Academic Officer at the Office of the State Board of Education, who serves as Chair of the Committee as the designee of the Executive Director.

SUBJECT

Graduate Medical Education – Committee Appointments

REFERENCE

December 5, 2017	Board approved a Graduate Medical Education 10-year plan.
June 2018	Board approved first reading of Board Policy III.C. Graduate Medical Education Committee.
August 2018	Board approved second reading of Board Policy III.C. Graduate Medical Education Committee.
June 2020	Board approved reappointments to the Graduate Medical Education Committee.
August 2020	Board approved the appointments of Dr. Jaren Blake and Dr. A.J. Weinhold to the Graduate Medical Education Committee.
October 2020	Board approved the appointments of Dr. Thomas Mohr and Dr. John Grider to the Graduate Medical Education Committee.
October 2022	Board approved the appointments of Dr. Perry Brown Jr., Dr. Abby Davids, Dr. Robyn Dreibelbis, and Dr. Matthew Larsen and the reappointments of Dr. Mary Barinaga, Dr. Justin Glass, Dr. John Grider, Dr. Melissa Hagman, Susie Keller, Dr. Samantha Portenier, Dr. Kimberly Stutzman, and Dr. William Woodhouse to the Graduate Medical Education Committee.

APPLICABLE STATUTE, RULE, OR POLICY

Idaho State Board of Education Governing Policies & Procedures, Section III.C.

BACKGROUND/DISCUSSION

The Graduate Medical Education (GME) committee plays a vital role in making recommendations on the implementation and refinement of the 10-year GME plan approved by the Board at the December 5, 2017 special Board meeting.

Consistent with Board Policy III.C, the purpose of the GME Committee is to provide recommendations to the Board on ways to enhance graduate education in the state of Idaho. The committee also supports the development, implementation, and monitoring of the Board's graduate medical education short and long-term plans. The committee reports to the Board through the Instruction, Research, and Student Affairs Committee.

A maximum of thirty (30) members can serve on the committee. All committee members are appointed by the Board. Committee members represent postsecondary institutions providing graduate medical education for Idaho, residency sites, the Idaho Medical Association, and the Office of the State Board

of Education. Representatives from medical organizations include a physician and an administrator. Appointments and/or reappointments serve five-year terms.

The Board is being asked to reappoint Dr. Clay Prince, Chief Medical Officer for Madisonhealth, to the Graduate Medical Education Committee.

IMPACT

Dr. Prince offered a letter of renewal.

ATTACHMENTS

Attachment 1 – GME Committee Members 2022
Attachment 2 – Dr. Clay Prince Letter of Reappointment

STAFF COMMENTS AND RECOMMENDATIONS

Staff recommends approval.

BOARD ACTION

I move to reappoint Dr. Clay Prince to serve on the Graduate Medical Education Committee effective immediately and expiring June 30, 2027.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

GRADUATE MEDICAL EDUCATION COMMITTEE MEMBERS

Institution	Representative	Email	Term Expiration June 30 of
Office of State Board of Education	Gideon Tolman	gideon.tolman@osbe.idaho.gov	Ex Officio
GME Coordinator	Ted Epperly, MD	tedepperly@fullcircleidaho.org	Ex Officio
Idaho Hospital Association	Brian Whitlock	bwhitlock@teamiha.org	2025
Idaho Medical Association	Susie Pouliot Keller, CEO	susie@idmed.org	2027
Idaho College of Osteopathic Medicine	Robyn Dreibelbis, DO	rdreibelbis@idahocom.org	2027
University of Utah School of Medicine	Ben Chan, MD Occasionally Kylie Christensen (Assoc Director/ MPH for RUUTE and Regional Affairs) for Chan	Benjamin.Chan@hsc.utah.edu kylie.christensen@hsc.utah.edu	2025
University of Washington School of Medicine	Mary Barinaga, MD – Vice Chair	barinm@uw.edu	2027
Full Circle Family Med Boise	Justin Glass, MD Abby Davids, MD	JustinGlass@fullcircleidaho.org abbydavids@fullcircleidaho.org	2027 2027
Full Circle Family Med Caldwell	Samantha Portenier, MD	Samantha.portenier@saintalphonsus.org	2027
Full Circle Family Med Nampa	Kim Stutzman, MD	KimStutzman@fullcircleidaho.org	2027
Full Circle Family Med Twin Falls	Joshua Kern, MD	kernjw@slhs.org	2025
Full Circle Pediatrics	Perry Brown, MD	PerryBrown@fullcircleidaho.org	2027
Idaho State University Family Medicine Residency	Bill Woodhouse, MD	billwoodhouse@isu.edu	2027
ISU Family Medicine Rexburg	A.J. Weinhold, MD	weinana@isu.edu	2025

		ajweinhold@isu.edu	
Coeur d' Alene Family Medicine Residency	Dick McLandress, MD	RMclandress@kh.org rmclandr@uw.edu	2025
EIRMC Family Medicine	Joshua Stringam, DO Luisa Hiendlmayr, MD (APD) has been attending in lieu of Stringham	Joshua.Stringam@hcahealthcare.com luzpineda25@gmail.com	2025
EIRMC Internal Medicine	John Grider, MD	John.Grider@hcahealthcare.com	2027
EIRMC Psychiatry	Matt Larsen, DO	Drmattlarsen@gmail.com	2027
UW Boise Internal Medicine	Moe Hagman, MD - Chair	mhagman@uw.edu	2027
UW Boise Psychiatry	Kirsten Aaland, MD	Kirsten.Aaland@va.gov	2025
University of Utah/Idaho Psychiatry Residency	Beth Botts, MD	Elizabeth.Botts@hsc.utah.edu	2025
Saint Alphonsus Healthcare	Lisa Nelson, MD	Lisa.M.Nelson@saintalphonsus.org	2025
St. Luke's Healthcare	Bart Hill, MD	hillb@slhs.org	2025
Portneuf Medical Center	Dan Snell, MD	Daniel.snell@portmed.org;	2022
Madison Memorial Hospital	Clay Prince, MD	clayprince@mmhnet.org	2022
Kootenai Health	Jon Ness	jness@kh.org	2025
Boise VAMC	Andy Wilper, MD	wilpera@gmail.com	2025
Eastern Idaho Regional Medical Center	Patricia Howell-DelTufo, MD	patricia.howell@hcahealthcare.com	Pending SBOE Review
West Valley Medical Center	Betsy Young Hunsicker	Betsy.hunsicker@healthonecares.com	2025

October 25, 2022

Clay Prince, MD
450 East Main Street
Rexburg, ID 83440
clay.prince@madisonhealth.net

Idaho State Board of Education
650 W. State Street
Boise, ID 83702

To whom it may concern,

My name is Clay Prince, and I am the Chief Medical Officer for Madisonhealth (formerly listed with the committee as Madison Memorial Hospital) in Rexburg, Idaho. I request to renew my appointment as the representative for this health network on the statewide Graduate Medical Education Committee.

Sincerely,
Clay Prince, MD

SUBJECT

Common Course Index Update

REFERENCE

June 1996	The Board adopted a common course listing for the General Education core.
September 2017	The Board adopted the Governor's Higher Education Task Force recommendations to include employing a Common Course numbering system.
February 2018	The Board was provided with an update on the establishment of common course indexing.
December 2018	The Board approved Idaho's Common Course Index list effective for the 2019-2020 academic year.

APPLICABLE STATUTE, RULE, OR POLICY

Idaho State Board of Education Governing Policies & Procedures, Section III.N. General Education

ALIGNMENT WITH STRATEGIC PLAN

Idaho K-20 Public Education Strategic Plan goal 4, Effective and Efficient Educational System, Objective B, Alignment and Coordination

BACKGROUND/DISCUSSION

Board Policy III.N, General Education establishes the General Education Matriculation (GEM) framework, which also provides for the development and maintenance of a common course index. The common course index consists of a core set of freshman and sophomore level curricula (100 and 200 level courses) within the GEM framework. Common course indexing includes four common components: common course prefix, common course number, common course title, and common GEM discipline area designation. Policy allows for Board approval of annual changes to the common course index. The Mathematical Ways of Knowing discipline group identified a need to amend math course titles and add another math course to the list.

IMPACT

Updates to the common course index are necessary as communication around these courses evolves over time. The revised math course titles better align with national trends in entry-level math coursework, which will increase transparency for students, particularly for transfer students.

ATTACHMENTS

Attachment 1 – Updated Common Course Index

STAFF COMMENTS AND RECOMMENDATIONS

Math faculty have discussed these proposed changes extensively. At the October 2022 General Education Summit, they approved of the changes to the math

courses as the new titles that better communicate the subject material to students. These changes were reviewed and approved by the statewide General Education Matriculation Committee on October 7, 2022.

Proposed amendments were shared with the Council on Academic Affairs and Programs on December 1, 2022, and with the Instruction, Research and Student Affairs Committee on December 8, 2022.

Board staff recommends approval.

BOARD ACTION

I move to approve proposed updates to the Common Course Index as submitted in Attachment 1.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

Idaho State Board of Education

650 W. State Street ● Room 307 ● Boise, ID ● 83702
P.O. Box 83720 ● Boise, ID ● 83720-0037

Idaho State Board of Education Common Course Listing

~~Academic Year 2019-20~~December 2022

Written Communications

ENGL x101: Writing and Rhetoric I
ENGL x102: Writing and Rhetoric II

Oral Communications

COMM x101: Fundamentals of Oral Communication

Mathematical Ways of Knowing

MATH x123: Math in Modern Society
MATH x130: Finite Mathematics
MATH x143: ~~College Algebra~~ Precalculus I: Algebra
MATH x144: Precalculus II: Trigonometry
MATH x147: ~~College Algebra and Trigonometry~~Precalculus
MATH x160: Survey of Calculus
MATH x170: Calculus I
MATH x153: Statistical Reasoning

Scientific Ways of Knowing

BIOL x100: Concepts of Biology
BIOL x227: Human Anatomy and Physiology I
CHEM x100: Concepts of Chemistry
CHEM x101: Introduction to Chemistry
CHEM x102: Essentials of Organic and Biochemistry
CHEM x111: General Chemistry I
PHYS x111: General Physics I

PHYS x112: General Physics II
GEOL x101: Physical Geology
GEOL x102: Historical Geology

Social and Behavioral Ways of Knowing

ANTH x101: Physical Anthropology
ANTH x102: Cultural Anthropology
ECON x201: Principles of Macroeconomics
ECON x202: Principles of Microeconomics
HIST x101: World History I
HIST x102: World History II
HIST x111: United States History I
HIST x112: United States History II
POLS x101: American National Government
PSYC x101: Introduction to Psychology
SOC x101: Introduction to Sociology
SOC x102: Social Problems

Humanistic and Artistic Ways of Knowing

MUSI x100: Introduction to Music
PHIL x101: Introduction to Philosophy
PHIL x103: Introduction to Ethics
ENGL x175: Literature and Ideas
ART x100: Introduction to Art
FREN x101: Elementary French I
FREN x102: Elementary French II
GERM x101: Elementary German I
GERM x102: Elementary German II
SPAN x101: Elementary Spanish I
SPAN x102: Elementary Spanish II

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IDAHO DIVISION OF VOCATIONAL REHABILITATION

SUBJECT

Idaho State Rehabilitation Council (Council) Appointments

REFERENCE

April 2018	Board appointed two current members to the Council and one new member.
June 2018	Board appointed two members to the Council.
August 2018	Board appointed one new member and re-appointed a former member to the Council.
June 2019	Board appointed three new members to the Council.
August 2019	Board appointed one new member to the Council.
October 2019	Board appointed one new member to the Council.
April 2020	Board appointed one new member and re-appointed two members to the Council.
June 2020	Board appointed four new members and re-appointed one member to the Council.
October 2020	Board appointed two new members to the Council.
June 2021	Board appointed one new member and re-appointed four members to the Council
August 2021	Board appointed two new members to the Council.
October 2021	Board appointed one new member to the Council.
June 2022	Board appointed one new member to the Council.

APPLICABLE STATUTE, RULE, OR POLICY

Idaho State Board of Education Governing Policies and Procedures, Section IV.G.
Sections 33-2202 and 33-2303, Idaho Code
34 C.F.R. § 361

BACKGROUND/DISCUSSION

Code of Federal Regulations (34 C.F.R. § 361.17) sets out the requirements for the State Rehabilitation Council, including the appointment and composition of State Rehabilitation Councils. The regulations require members of state councils to be appointed by the Governor or, in the case of a state that under State law vests authority for the administration to an entity other than the Governor, the chief officer of that entity. Idaho Code § 33-2303 designates the State Board for Career Technical Education as that entity. Idaho Code § 33-2202 designates the State Board of Education as the State Board for Career Technical Education "for the purpose of carrying into effect any acts by Congress "affecting vocational rehabilitation."

Further federal regulations establish that the Council must be composed of at least fifteen (15) members, including:

i. At least one representative of the Statewide Independent Living Council, who must be the chairperson or other designee of the Statewide Independent Living Council;
ii. At least one representative of a parent training and information center established pursuant to section 682(a) of the Individuals with Disabilities Education Act;
iii. At least one representative of the Client Assistance Program established under 34 CFR part 370, who must be the director, or another individual recommended by the Client Assistance Program;
iv. At least one qualified vocational rehabilitation counselor with knowledge of, and experience with vocational rehabilitation programs who serves as an ex officio, nonvoting member of the Council if employed by the designated State agency;
v. At least one representative of community rehabilitation program service providers;
vi. Four representatives of business, industry, and labor;
vii. Representatives of disability groups that include a cross section of (A) Individuals with physical, cognitive, sensory, and mental disabilities; and (B) Representatives of individuals with disabilities who have difficulty representing themselves or are unable due to their disabilities to represent themselves;
viii. Current or former applicants for, or recipients of, vocational rehabilitation services;
ix. In a State in which one or more projects are carried out under section 121 of the Act (American Indian Vocational Rehabilitation Services), at least one representative of the directors of the projects;
x. At least one representative of the State educational agency responsible for the public education of students with disabilities who are eligible to receive services under this part and part B of the Individuals with Disabilities Education Act;
xi. At least one representative of the State workforce investment board; and
xii. The director of the designated State unit as an ex officio, nonvoting member of the Council.

Additionally, Federal Regulations specify that a majority of the council members must be individuals with disabilities who meet the requirements of 34 CFR § 361.5(b)(28) and are not employed by the designated State unit. Members are appointed for a term of no more than three (3) years, and each member of the Council may serve for not more than two consecutive full terms. A member appointed to fill a vacancy occurring prior to the end of the term must be appointed for the remainder of the predecessor's term. A vacancy in membership of the Council must be filled in the same manner as the original appointment, except the appointing authority may delegate the authority to fill that vacancy to the remaining members of the Council after making the original appointment.

The Council currently has three (3) appointments for Board consideration. The

Council is nominating Mark Reinhardt as a representative of the Former Applicant or Recipient of VR services; Diana Colgrove as a representative of Business, Industry and Labor; and Nancy Grant as replacement of the designated Client Assistance Program (CAP) Representative as per the CFR.

IMPACT

The three (3) appointments will bring the Council membership to 18.

ATTACHMENTS

Attachment 1 – Current Council Membership
Attachment 2 – Mark Reinhardt Application
Attachment 3 – Diana Colgrove Application and Resume
Attachment 4 – Nancy Grant Application and Resume

STAFF COMMENTS AND RECOMMENDATIONS

The requested appointment meets the provisions of Board policy IV.G. State Rehabilitation Council, and the applicable Federal regulations.

Staff recommends approval

BOARD ACTION

I move appoint Mark Reinhardt as a representative of the Former Applicant or Recipient of VR services for a three-year term, effective immediately through December 21, 2025.

Moved by _____ Seconded by _____ Carried Yes_____ No_____

AND

I move to appoint Diana Colgrove as a representative of Business, Industry and Labor for a three-year term, effective immediately through December 21, 2025.

Moved by _____ Seconded by _____ Carried Yes_____ No_____

AND

I move to appoint Nancy Grant as a representative the Client Assistant Program for a three-year term, effective immediately through December 21, 2025.

Moved by _____ Seconded by _____ Carried Yes_____ No_____

Members Shall Represent	Representation Required	Name	Region	Term	Term Ends	Voting Member	#
Former Applicant or Recipient of VR services	Minimum 1	Vacant					
		Stephanie Taylor-Silva	Idaho Falls	1st	08/25/2024	Yes	1
Parent Training & Information Center	Minimum 1	Sarah Tueller	Treasure Valley	2nd	6/30/2024	Yes	2
Client Assistant Program	Minimum 1	Christine Meeuwsen	Treasure Valley	1st	Effective 7/12/2020 No term limit	Yes	3
Vocational Rehabilitation Counselor	Minimum 1	David White	Treasure Valley	1st	06/30/2024	**No**	4
Community Rehabilitation Program	Minimum 1	Pam Harris	Couer d'Alene	1st	06/30/2024	Yes	5
Business, Industry and Labor	Minimum 4	Vacant					
		Darin Lindig	Treasure Valley	2nd	05/31/2024	Yes	6
		Ron Oberleitner	Treasure Valley	2nd	08/31/2023	Yes	7
		Vacant					
Disability Groups	No minimum or maximum	Janice Carson	Moscow	2nd	05/31/2023	**No**	8
		Tim Blonsky	Treasure Valley	1st	08/25/2024	Yes	9
		Dave Maxwell	Treasure Valley	1st	06/30/2022	Yes	10
		Nathan Ogden	Treasure Valley	1st	08/31/2023	Yes	11
State Independent Living Council	Minimum 1	Jami Davis	Treasure Valley	1st	10/20/2024	Yes	12
Department of Education	Minimum 1	Randi Cole	Treasure Valley	1st (2nd term of Kendrick)	08/31/2023	**No**	13
Director of Vocational Rehabilitation	Minimum 1	Jane Donnellan	Treasure Valley	No end date		**No**	14
Idaho's Native American Tribes	Minimum 1	Ramona Medicine Horse	Blackfoot	No end date		Yes	15
Workforce Development Council	Minimum 1	James Pegram	Treasure Valley	1st	06/30/2024	Yes	16

REC'D - FISCAL
JUN 17 2022

Idaho Division of Vocational Rehabilitation

STATE REHABILITATION COUNCIL NOMINATION FORM

Nominee's Name: Mark Reinhardt

Mailing Address: 8650 W Rifleman St #B202

Home/Cell Phone: 208-713-3086 Work Phone: _____

E-Mail: acousticfreeze@gmail.com

Please explain why you would like to serve on the State Rehabilitation Council

I believe my presence on the council would be beneficial in that I would push for Job Coaches to be properly trained. I feel it is necessary to add training requirements for vendors who provide Job Coaching services to properly Vocationally Rehabilitate individuals with Disabilities. Without some form of training I feel vendors are not qualified to help those with Disabilities maintain employment, and I will push for some kind of training requirement.

What Boards, Commissions, Councils, or Task Forces, etc., have you previously, or currently served on?

Name: _____ Term Date: _____

Name: _____ Term Date: _____

Name: _____ Term Date: _____

Name: _____ Term Date: _____

How many hours per month would you be able to commit to State Rehabilitation Council activities?

☐ **1 to 3 hours** ☐ **4 to 6 hours** ☑ **7 to 9 hours** ☐ **10 or more hours**

CFR 361.17(c)(1) Requires a majority of the Council members be individuals with disabilities. While your disclosure is voluntary, it would be a benefit to the Council in determining membership compliance.

Disability

☑ Yes ☐ No

RETURN TO:
IDAHO STATE REHABILITATION COUNCIL
ATTN: Council Secretary
650 West State Street, Room 150
P.O. Box 83720
Boise, Idaho 83720-0096

REC'D - FISCAL
JUN 17 2022

Idaho Division of Vocational Rehabilitation

STATE REHABILITATION COUNCIL APPLICATION FORM

Name: Diana Kadekian Colgrove

Mailing Address: 11985 N Rimrock Rd

Home/Cell Phone: 406-250-1118 Work Phone:

E-Mail: diana.colgrove@gmail.com

Please explain why you would like to serve on the State Rehabilitation Council

See attached.

What Boards, Commissions, Councils, or Task Forces, etc., have you previously, or currently served on?

Name:	Family Support Services Advisory Council	Term Date:	2003 to 2010
Name:	- Montana state Interagency Coordinating Council	Term Date:	Chairperson 2005-2010
Name:	Special Education Advisory Panel	Term Date:	2005-2007
Name:	- Montana State IDEA Part C Representative	Term Date:	Chairperson 2006-2007

It is the expectation for members is to be able to commit to 1 day per quarter and 1 hour per month to dedicate to State Rehab Council activities. Do you have commitments or conflicts that might prevent you from attending quarterly Council meetings?

☑ **No** ☐ **Yes If "Yes" please explain:**

CFR 361.17(c)(1) Requires a majority of the Council members be individuals with disabilities. While your disclosure is voluntary, it would be a benefit to the Council in determining membership compliance.

Disability

☐ **Yes** ☑ **No**

Please attach a resume so that the Council may learn about employment history, educational background, group affiliations, community involvement and interests.

RETURN TO:

IDAHO STATE REHABILITATION COUNCIL
ATTN: Council Secretary
650 West State Street, Room 150
P.O. Box 83720
Boise, Idaho 83720-0096

DIANA KADEKIAN COLGROVE

diana.colgrove@gmail.com

Education

CAL POLY, San Luis Obispo, CA 1990
Bachelor of Science Degree in Applied Mathematics

Work / Volunteer Experience

FIVE SEAS, LLC DBA SPORT CLIPS – Idaho, Montana and Washington 2012 - Present
Owner
- In charge of recruiting, marketing, orders, accounting, payroll, HR and daily operations.

WHITEFISH CARE & REHABILITATION CENTER –Whitefish, Montana 2010 - 2012
Social Services Directory
- Only social service worker for a long-term nursing home and rehabilitation facility with 100 beds. In charge of new resident check-in and evaluations as well as quarterly reviews, discharge facilitation and as needed support for all residents.

MONTANA MENTORING INITIATIVE – Eureka, Montana 2008 - 2010
Project Advisor – Volunteer Position
- Recruit, train, supervise and match high school students for mentoring younger students

JMGF (Jobs for Montana Graduates Foundation) Site Supervisor – Volunteer Position
- Liaison with JMGF / AmeriCorps representative from Helena to assist high school students to apply for scholarships. Supervisor and approve monthly time sheets and assist with qualified activities.

LINCOLN COUNTY SCHOOLS – Eureka, Montana 2008 - 2010
Substitute Teacher (long and short term)
- Substitute for K-12 grades, including special education and alternative school.

FAMILY SUPPORT SERVICES ADVISORY COUNCIL – Helena, Montana 2003 - 2010
Chairperson – Volunteer Position 2005-2009
Region V Parent Representative (5 regions in the state plus 1 at large) 2003 - 2010
- Appointed to position by two Governors of Montana (Judy Martz and Brian Schweitzer). The Family Support Services Advisory Council (FSSAC) is the Montana State Interagency Coordinating Council (ICC) as mandated by Federal Regulation (Individuals with Disabilities Education Act – Idea part C). Representatives of the Council are appointed by the Montana State Governor and reappointed annually. The Mission of the FSSAC is to provide consumer and professional guidance to local and state agencies whose purpose it is to plan and provide services which support families to raise their children with disabilities at home within Montana's communities. Term ended when my daughter aged out.

SPECIAL EDUCATION ADVISORY PANEL – Helena, Montana 2005 - 2007
Chairperson – Volunteer Position 2006-2007
Liaison to Part C services and Parent of a child with a Disability 2005-2007

As a parent of a 22-year-old daughter with Down Syndrome, it is important for me to help individuals who are seeking employment to be able to find a place where they can be productive and proud members of their community.

In my role as a small business owner, I make my business available for summer job training programs for students with special needs who are looking for real life job experience in the community.

In becoming involved in the State Rehabilitation Council, I hope to help expand the employment opportunities that are available to our special needs community. I would also like to see more information and education provided to local employers who may not realize the workforce that is available to them.

Idaho Division of Vocational Rehabilitation

State Rehabilitation Council application Form

Name: Nancy Grant

Mailing Address:

Home/Cell Phone: Work Phone: 208-586-2530

E-Mail: nancy@disabilityrightsidaho.org

Please explain why you would like to serve on the State Rehabilitation Council

As Christine Meeuwsen is transitioning to another position within DRI, I was asked to participate on this committee. I am a Senior Non-Attorney Advocate with our organization and at the moment, the only advocate with CAP review experience. I have been working with DRI as an advocate for nine and a half years, and have also been a CAP reviewer. As I have experience in this area, there really wouldn't be a lot for me to do to prepare for this role. I believe that I could step in, and participate as an active member immediately. I am a pretty positive person, I love working with and meeting new people.

Boards, Commissions, Councils, or Task Forces, etc., have you previously, or currently served on?

Name: Term Date: Presently an active member; Idaho Brain Injury Alliance Board since 2015

Name: Term Date: Presently an active member; Region 5 Crisis Intervention Team since 2018

Name: Term Date:

Name: Term Date:

It is the expectation for members is to be able to commit to 1 day per quarter and 1 hour per month to dedicate to State Rehab Council activities. Do you have commitments or conflicts that might prevent you from attending quarterly Council meetings? No Yes If "Yes" please explain:

No

CFR 361.17(c)(1) Requires a majority of the Council members be individuals with disabilities. While your disclosure is voluntary, it would be a benefit to the Council in determining membership compliance. **Disability**

Yes No

Please attach a resume so that the Council may learn about employment history, educational background, group affiliations, community involvement and interests.

RETURN TO:

IDAHO STATE REHABILITATION COUNCIL
ATTN: Council Secretary
650 West State Street, Room 150
P.O. Box 83720
Boise, Idaho 83720-0096

Nancy C. Grant

Strengths

Understands State Administrative Complaints, State Department of SPED/IEP/OCR Complaints, Abuse & Neglect Investigations, Death Investigations in Facilities, State & Tribal Vocational Rehabilitation (CAP) complaints; Administrative review concerning rights violations

- Reviewing public/private facility policies and rules; rights violations
- Reviewing JCAHO accredited state hospitals policies and rules
- Reviewing CMS regulations for Medicare/Medicaid Facility complaints
- Reviewing Idaho State IDAPA's, Codes and Statutes
- Reviewing Idaho Special Education Manual & due process complaints
- Reviewing the Idaho State Field Manual; VR complaints and appeals

Experience

Senior Non-Attorney Advocate July 2013 - Present
State of Idaho (P&A) Protection and Advocacy Authority – Pocatello office

- Informing people with disabilities of their rights in accordance with policies/rules
- Advocate to protect the rights of people with disabilities
- Providing information, tools and referrals that empower people to advocate for themselves
- Assisting people in cases where an advocate may be needed
- Monitoring conditions in public and private facilities
- Investigate rights violations, abuse, neglect, or deaths in facilities
- Outreach to underserved ethnic and disability communities
- Represent individuals with disabilities based on priorities and case selection criteria
- Educate people with disabilities, their families and representatives about self-advocacy

Education

Bachelors of Science, Psychology 2003
Idaho State University – Pocatello, ID

Intensive Behavioral Intervention Specialist/HI 2004
Professional Certification

Idaho Training Cooperative

Developmental Specialist for Children 3-17 2010
Professional Certification
Idaho Developmental Disabilities Program

STATE DEPARTMENT OF EDUCATION

SUBJECT

Emergency Provisional Certificates Recommendations

REFERENCE

February 2022	Board approved twenty-six (26) provisional certificates for the 2021-2022 school year.
April 2022	Board approved nineteen (19) provisional certificates for the 2021-2022 school year.
June 2022	Board approved six (6) provisional certificates for the 2021-2022 school year.
August 2022	Board approved two (2) provisional certificates for the 2022-2023 school year.
October 2022	Board approved seventy-six (76) provisional certificates for the 2022-2023 school year.

APPLICABLE STATUTE, RULE, OR POLICY

Idaho Code § 33-1201 and 33-1203

BACKGROUND/DISCUSSION

Eighty-seven (87) complete Emergency Provisional Certificate applications were received by the State Department of Education by October 26, 2022, including eighty-two (82) Instructional and Occupational Specialist Certificate applications and five (5) Pupil Service Staff Certificate applications from the school districts listed below. These applications for the 2022-23 school year were reviewed by the Certification Department of the State Department of Education using the state board approved Emergency Provisional Certificate Application Process. The Emergency Provisional Certificate allows a school district or charter school to request one-year certification/endorsement in an emergency situation for a candidate who does not hold the required Idaho certificate or endorsement to fill a position. While the candidate is under emergency provisional certification, no financial penalties will be assessed to the hiring district.

Instructional and Career Technical Education (CTE) Applications

West Ada School District #002
Applicant Name: Waylon Wagner
Endorsement(s): Health 6-12
College Training: 64 Credits
Declared Emergency Date: 8/22/22
Hire/Assignment Date: 8/18/2022
Summary of Recruitment Efforts: Three applications were received and none were certified. Only one applicant was comfortable with the position being part-time.

St. Maries Joint School District #41
Applicant Name: Michael Ebert
Endorsement(s): History 5-9
College Training: BS
Declared Emergency Date: 9/19/2022
Hire/Assignment Date: 9/19/2022
Summary of Recruitment Efforts: Position was advertised since its vacancy in June. Zero applications were received. Another candidate was recruited, but left the position after four days, leading to the recruitment of the current candidate.

Plummer-Worley School District #44
Applicant Name: Arynn Gomez
Endorsement(s): All Subjects K-8
College Training: 80+ credits
Declared Emergency Date: 8/8/2022
Hire/Assignment Date: 8/9/2022
Summary of Recruitment Efforts: Elementary teaching positions have been posted and advertised since Spring, including through Handshake, and local newspapers. The district only received two "new" applications. This candidate is a district paraprofessional in the process of obtaining an education degree.

Snake River School District #052
Applicant Name: Corrie Cagle
Endorsement(s): All Subjects K-8
College Training: 50 credits
Declared Emergency Date: 10/19/2022
Hire/Assignment Date: 8/17/2022
Summary of Recruitment Efforts: District interviewed five candidates. Three out of the five were not finished with their degree and did not have experience with teaching children. They were deemed not a good fit for the school. One candidate had teaching experience, but at their previous employment, had injury to a child charges and was deemed not a good fit. The fifth and current candidate does not have her degree, but is working towards finishing a degree. She has subbed in the district for many years. She has proven strategies for teaching and management.

Garden Valley School District #071
Applicant Name: Heather Gillette
Endorsement(s): All Subjects K-8
College Training: 77+ credits
Declared Emergency Date: 7/12/2022
Hire/Assignment Date: 7/12/2022
Summary of Recruitment Efforts: Position was advertised on Schoolspring.com, IDEdjobs.com, the Idaho World Newspaper, school district website, Facebook, radio commercials and various outlets. Recruitment efforts began in Spring of 2022 after the resignation of a staff member.

Applicant Name: Heather Jenkins
Endorsement(s): All Subjects K-8
College Training: 55+ credits
Declared Emergency Date: 7/12/22
Hire/Assignment Date: 8/8/2022
Summary of Recruitment Efforts: Position was advertised on Schoolspring.com, IDEdjobs.com, the Idaho World Newspaper, school district website, Facebook, radio commercials and various outlets. Recruitment efforts began in Spring of 2022 after the resignation of a staff member.

Applicant Name: Kaiden Prestwich
Endorsement(s): Mathematics 6-12
College Training: 79+ credits
Declared Emergency Date: 7/12/2022
Hire/Assignment Date: 8/9/2022
Summary of Recruitment Efforts: Math position was advertised on Schoolspring.com, IDEdjobs.com, the Idaho World Newspaper, school district website, Facebook, radio commercials and various outlets. In addition, submitted position notification to Man-Power. Man-Power submitted one applicant that was not qualified and had a minimum wage requirement $9,000 higher than school could pay.

Bonneville Joint School District #093
Applicant Name: Scott Hymas
Endorsement(s): All Subjects K-8
College Training: BA
Declared Emergency Date: 9/14/2022
Hire/Assignment Date: 8/22/22
Summary of Recruitment Efforts: Three math vacancies at the middle school over the Summer. The applicants third vacancy consisted of two certified teachers who were already under contract as well as a few others not certified. The candidate was in the process of registering for the ABCTE program and had previously worked as a paraprofessional in the building. Has a BA and a MA. He was a late hire in August five days prior to the first contract day for teachers.

Boundary County School District #101
Applicant Name: Kassandra Skeen
Endorsement(s): All Subjects K-8
College Training: BA
Declared Emergency Date: 8/15/2022
Hire/Assignment Date: 8/25/2022
Summary of Recruitment Efforts: Six applicants to fill the open position with only one holding the appropriate certification. Based on interviews and past employment the committee did not select the certified applicant.

Butte County School District #111
Applicant Name: Crystal Reynolds
Endorsement(s): All Subjects K-8
College Training: BA
Declared Emergency Date: 9/19/2022
Hire/Assignment Date: 9/20/2022
Summary of Recruitment Efforts: This position came when the music teacher resigned and the kindergarten teacher was reassigned to the recent vacated music position, due to her degree in music. The candidate has been a substitute in the district for several years and has a good foundation of classroom management and teaching. Two applications were received. The current candidate has a degree which the other applicant does not. The position was posted on August 30, 2022.

Camas Count School District #121
Applicant Name: Kortnee Fleming
Endorsement(s): All Subjects K-8
College Training: BS
Declared Emergency Date: 8/8/2022
Hire/Assignment Date: 8/16/2022
Summary of Recruitment Efforts: The position was posted on EdJobs and in the local paper. A certified teacher applied, but could not secure housing for her and her family and withdrew in late July. The current candidate was hired on August 8, 2022.

Applicant Name: S. Mark Hansen Jr
Endorsement(s): English 5-9, Physical Education 6-12
College Training: BS
Declared Emergency Date: 6/13/2022
Hire/Assignment Date: 8/16/2022
Summary of Recruitment Efforts: The position was posted on EdJobs and in the local paper. Two applications were received. A certified teacher applied, but declined. The current candidate was the second applicant.

Nampa School District #131
Applicant Name: Torrey Thomas
Endorsement(s): CTE Network and Computer Support
College Training: BS
Declared Emergency Date: 8/8/2022
Hire/Assignment Date: 8/15/2022
Summary of Recruitment Efforts: Reached out to NNU, College of Western Idaho, BSU, Boise Code Works, Nampa Chamber of Commerce and CTE Directors in the state. None of them had applicants interested in the position.

Vallivue School District #139
Applicant Name: Rebecca Lauti
Endorsement(s): Music K-12

College Training: BA
Declared Emergency Date: 8/9/2022
Hire/Assignment Date: 8/10/2022
Summary of Recruitment Efforts: Enrolled with NNU, but program won't start until Fall 2023. The position was posted and had zero applicants. The candidate applied and has a BA in Music.

Applicant Name: Talon Sudbeck
Endorsement(s): All Subjects K-8
College Training: BA
Declared Emergency Date: 8/9/2022
Hire/Assignment Date: 8/10/2022
Summary of Recruitment Efforts: On July 20th, a kindergarten teacher resigned her position at Central Canyon. The position was opened immediately anticipating school opening on August 10th. As of July 31st, the candidate was the only applicant. Emails were sent to staff and posted on Facebook. The candidate had previously worked as a para. Talon will be completing the ABCTE program.

Soda Springs School District #150
Applicant Name: Taylor Spurrier
Endorsement(s): Health 6-12
College Training: BA
Declared Emergency Date: 9/2/2022
Hire/Assignment Date: 9/13/2022
Summary of Recruitment Efforts: Current candidate is enrolled in an out of state program but has not transferred schools and is nor sure which endorsement to continue through the program. Position was advertised for over a month with the current candidate the only application.

Cassia County School District #151
Applicant Name: Kimberly Hammond
Endorsement(s): All Subjects K-8
College Training: 128+ credits
Declared Emergency Date: 10/20/22
Hire/Assignment Date: 8/2021
Summary of Recruitment Efforts: District posted position on district website and K12jobspot. The current candidate was the best fit. She was employed by the school district in 21-22.

Applicant Name: Beatriz Nava
Endorsement(s): World Language Spanish K-12
College Training: 121+ credits
Declared Emergency Date: 10/20/2022
Hire/Assignment Date: 7/2022

Summary of Recruitment Efforts: Job was posted on district website and K12jobspot. Beatriz seemed to be the best fit. Enrolled in a program. Won't be student teaching until Spring 2024

Applicant Name: Shalamar Packer
Endorsement(s): All Subjects K-8
College Training: AA
Declared Emergency Date: 10/20/2022
Hire/Assignment Date: 8/17/2022
Summary of Recruitment Efforts: District posted position on district website and K12jobspot. Of the three interviewed, only one had certification, but turned down the position. The current candidate had more classroom experience then the remaining candidates.

Applicant Name: Tammy Thompson
Endorsement(s): English 6-12
College Training: AA
Declared Emergency Date: 10/20/2022
Hire/Assignment Date: 10/5/2022
Summary of Recruitment Efforts: Job posted on district website and K12JobSpot.com. The committee chose the current candidate because she was helping with the speech class and is doing a great job. She is working with BSU to become certified. The other candidate had not yet started this process. The committee felt the current candidate would be a good fit.

Challis School District #181
Applicant Name: Jamie Lamb
Endorsement(s): Biological Science 6-12, Natural Science 6-12
College Training: AA
Declared Emergency Date: 10/14/2022
Hire/Assignment Date: 10/14/2022
Summary of Recruitment Efforts: The position was posted in four locations for two weeks with the current candidate being the only applicant. The current teacher resigned and the position needs to be filled.

Mountain Home School District #193
Applicant Name: Jessica Dice
Endorsement(s): All Subjects K-8
College Training: BS
Declared Emergency Date: 8/16/2022
Hire/Assignment Date: 8/10/2022
Summary of Recruitment Efforts: Due to some elementary positions added because of increased enrollment at a couple of the elementary schools and community growth, this caused several late openings this year. Positions were posted online and on social media, the district website and Edjobs.com. Reached out to BSU if any education students were elementary ed or PE in student teaching.

Even reached out to retired teachers. One retired teacher was able to fill one position. This candidate was the only other candidate.

Applicant Name: Hailie Wilds
Endorsement(s): All Subjects K-8
College Training: BA
Declared Emergency Date: 8/16/2022
Hire/Assignment Date: 8/10/2022
Summary of Recruitment Efforts: Positions were posted online and on social media, the district website and Edjobs.com. Reached out to BSU if any education students in student teaching. Contacted other districts if they had turned away any candidates. Two applicants applied, one already being a teacher in the district. School did not want to move teachers around the day before school starting as this would have created another opening which was proving hard to fill.

Emmett School District #221
Applicant Name: Brandy Kay
Endorsement(s): Music K-12
College Training: BA
Declared Emergency Date: 10/17/2022
Hire/Assignment Date: 8/11/2022
Summary of Recruitment Efforts: Originally, a candidate was hired for the music position. However, due to high cost of living, the candidate retracted the acceptance. The building principal had to continue his recruitment efforts and sought the current candidate. She accepted the position four days before the start of the school year. She is currently working towards enrolling in a music education program through Lewis-Clark State College. She has hands-on collegiate music experience as well as classroom experience from a previous position held.

Applicant Name: Mitchel Maxfield
Endorsement(s): Physical Education K-12
College Training: BS
Declared Emergency Date: 10/17/2022
Hire/Assignment Date: 8/19/2022
Summary of Recruitment Efforts: This particular job was posted in the Spring of 2022 and prior to hiring the current candidate, four other candidates were interviewed and offered the position. All four candidates accepted the position and then retracted their acceptance due to a variety of reasons. Just a few days before the start of the school year, the current candidate was recruited to the PE position at the high school.

Applicant Name: Katrina Rone
Endorsement(s): All Subjects K-8
College Training: AA
Declared Emergency Date: 9/12/2022
Hire/Assignment Date: 8/12/2022

Summary of Recruitment Efforts: Emmett MS lost its entire Math department before the start of the 22-23 school year. After intense recruitment and hiring, the administrative team was unable to fill all four math openings. However, one week prior to the school year starting, one employee resigned from the math position to accept in another district. That left one position short with the school starting in five days. The current candidate is working towards a K-8 endorsement and degree.

Gooding School District #231
Applicant Name: Averi Adams
Endorsement(s): All Subjects K-8
College Training: 116
Declared Emergency Date: 8/9/22
Hire/Assignment Date: 8/15/2022
Summary of Recruitment Efforts: All applicants were not certified. The position became open in late July due to a resignation. The candidate was chosen that had completed almost everything but student teaching. Will complete this in the Fall of 2024.

Wendell School District #232
Applicant Name: Riley Johnson
Endorsement(s): All Subjects K-8
College Training: 52+ credits
Declared Emergency Date: 2/15/2022
Hire/Assignment Date: 2/15/2022
Summary of Recruitment Efforts: Deemed an emergency for a teacher leaving mid-year. Riley will not be completing student teaching until Fall of 2023

Jefferson School District #251
Applicant Name: Cassidy McLaughlin
Endorsement(s): All Subjects K-8
College Training: BA
Declared Emergency Date: 8/10/2022
Hire/Assignment Date: 8/10/2022
Summary of Recruitment Efforts: Late posting due to increased enrollment.

Applicant Name: Dana Nordhagen
Endorsement(s): All Subjects K-8
College Training: BS
Declared Emergency Date: 11/10/2022
Hire/Assignment Date: 8/10/2022
Summary of Recruitment Efforts: Four applicants were hired for other positions. Two were previous employees that the school is not willing to hire back at this time. One applicant was not certified. Ms. Nordhagen was hired with the understanding she would apply as an out-of-state candidate. However, there has been a delay with her receiving her Washington State credential.

Ririe School District #252
Applicant Name: Hannah Harris
Endorsement(s): CTE Family and Consumer Science 6-12
College Training: BA
Declared Emergency Date: 8/10/2022
Hire/Assignment Date: 9/1/2022
Summary of Recruitment Efforts: The position was vacated late. It was posted "open" on the school district website and on Indeed. Only one application was received.

Jerome Joint School District #261
Applicant Name: Erika Arellano
Endorsement(s): All Subjects K-8
College Training: 90+ credits
Declared Emergency Date: 8/9/2022
Hire/Assignment Date: 8/15/2022
Summary of Recruitment Efforts: The position for which the candidate was hired remained open with no application for several months. The candidate is currently seeking her bachelor's degree with hopes of pursing Education upon completion. No applications were received until the candidate applied. She was previously a para within the school district.

Applicant Name: Sara Bateman
Endorsement(s): All Subjects K-8
College Training: AA
Declared Emergency Date: 10/25/2022
Hire/Assignment Date: 9/19/2022
Summary of Recruitment Efforts: The initial hire for this current position was dismissed the day before Meet the Teacher night, leaving a vacancy. The current candidate was a long-term substitute teacher and stepped in to substitute for the class. Three applications were received, including the dismissed teacher. The principal deemed them an unsuitable candidate. The candidate interviewed for the position and was hired.

Applicant Name: Jessica Reynoso
Endorsement(s): Earth and Space Science 6-12
College Training: 63+
Declared Emergency Date: 8/23/2022
Hire/Assignment Date: 8/15/2022
Summary of Recruitment Efforts: Four applicants were interviewed out of five applications. One accepted with Twin Falls SD, and one with Wendell. One did not have a positive remark from references. The current candidate was offered the position and had great references. She is bilingual and has been a part of the district as a volleyball coach.

Applicant Name: Denae Robinson

Endorsement(s): English 6-12
College Training: 89+ credits
Declared Emergency Date: 8/23/2022
Hire/Assignment Date: 8/15/2022
Summary of Recruitment Efforts: The candidate was hired as the Life Skills Coach and the only applicant. This position was opened for two years.

Coeur d'Alene School District #271
Applicant Name: Tracie Yankoff
Endorsement(s): All Subjects K-8
College Training: BA
Declared Emergency Date: 10/3/2022
Hire/Assignment Date: 9/19/2022
Summary of Recruitment Efforts: Due to a late resignation of a partial FTE, the school needed to fill a .4 FTE to keep the classroom with the least amount of disruption. This proved to be the most efficient way. Two eligible candidates were considered. The applications received were either not completed or not yet certified.

Lakeland School District #272
Applicant Name: Susan Bissell
Endorsement(s): All Subjects K-8
College Training: BA
Declared Emergency Date: 9/28/2022
Hire/Assignment Date: 9/18/2022
Summary of Recruitment Efforts: The candidate was a long-term sub for a teacher but now has moved to a certified position.

Applicant Name: Torrie McKellar
Endorsement(s): All Subjects K-8
College Training: 109+ credits
Declared Emergency Date: 9/14/2022
Hire/Assignment Date: 9/6/2022
Summary of **Recruitment Efforts:** Teacher turned in resignation just before school started. Candidate has been a guest teacher as well as a paraprofessional for the district.

Applicant Name: Lacie Salisbury
Endorsement(s): All Subjects K-8
College Training: 64+ Credits
Declared Emergency Date: 9/14/2022
Hire/Assignment Date: 9/1/2022
Summary of Recruitment Efforts: Position was opened for 67 days. Current candidate was a paraprofessional and is enrolled in the Lewis-Clark State College Elementary Education program.

Applicant Name: Melanie Spicer
Endorsement(s): All Subjects K-8
College Training: 156+ Credits
Declared Emergency Date: 9/14/2022
Hire/Assignment Date: 9/6/2022
Summary of Recruitment Efforts: Four applications were received. Two were hired elsewhere. The remaining two were hired due to the enrollment numbers increasing.

Shoshone School District #312
Applicant Name: Amanda Huddleston
Endorsement(s): Mathematics Middle Level 5-9
College Training: 82 credits
Declared Emergency Date: 8/9/2022
Hire/Assignment Date: 8/10/2022
Summary of Recruitment Efforts: Amanda is getting her degree in Mathematics 5-9 from Western Governor's University. She is on track to complete the program in May of 2023.

Richfield School District #316
Applicant Name: Katie Hillin
Endorsement(s): All Subjects K-8
College Training: 55+ credits
Declared Emergency Date: 8/8/2022
Hire/Assignment Date: 8/8/2022
Summary of Recruitment Efforts: Only one application was received. Position was advertised through the State and with the Department of Education.

Applicant Name: Colter Larsen
Endorsement(s): All Subjects K-8
College Training: 63 credits
Declared Emergency Date: 8/8/2022
Hire/Assignment Date: 8/8/2022
Summary of Recruitment Efforts: Candidate was the only application received. Position has been posted since May, listed on the school's website.

Applicant Name: Wesley Naylor
Endorsement(s): Physical Education K-12, Health K-12
College Training: 110+ credits
Declared Emergency Date: 9/12/2022
Hire/Assignment Date: 6/13/2022
Summary of Recruitment Efforts: Current candidate taught for the school district in the 21-22 school year. Mr. Naylor will graduate in December and enroll in the College of Southern Idaho's non-traditional educator preperation program beginning in July.

Sugar-Salem School District #322
Applicant Name: Gregory Yorgason
Endorsement(s): All Subjects K-8
College Training: 127+ credits
Declared Emergency Date: 8/3/2022
Hire/Assignment Date: 5/11/2022
Summary of Recruitment Efforts: Greg needs to take the Praxis before being allowed to student teach. Currently enrolled in the educator preperation program at BYU-Idaho. District was notified of the delay in student teaching in the Fall, even though the candidate was hired in May.

Minidoka County School District #331
Applicant Name: Dale Dayley
Endorsement(s): Social Studies 6-12
College Training: AA
Declared Emergency Date: 9/30/2022
Hire/Assignment Date: 9/30/2022
Summary of Recruitment Efforts: The position was opened three days before the first day of school. The candidate was the most qualified. He will be deciding on which route to take towards certification.

Applicant Name: Margarita Espinoza-Henscheid
Endorsement(s): All Subjects K-8
College Training: BA
Declared Emergency Date: 8/29/2022
Hire/Assignment Date: 8/29/2022
Summary of Recruitment Efforts: The position was posted two days prior to school. Two applicants were received. Margarita had previous experience, teaching in the 21-22 school year. Enrolled in ABCTE but did not meet the point requirement for the Content Specialist.

Applicant Name: Kristy Herbert
Endorsement(s): Mathematics 6-12
College Training: BA
Declared Emergency Date: 9/19/2022
Hire/Assignment Date: 8/15/2022
Summary of Recruitment Efforts: Enrolled in the College of Southern Idaho program, but did not meet the rubric qualification. Is set to take Praxis in November. Position was advertised from August 17th-August 23rd and received two applicants.

Applicant Name: David Hernandez
Endorsement(s): All Subjects K-8
College Training: 57 credits
Declared Emergency Date: 8/15/2022
Hire/Assignment Date: 8/1/2022

Summary of Recruitment Efforts: The position was posted from April 21, 2022 to August 8, 2022. The administrator completed many interviews for the four ELA positions available in the building. Nine applications were received, two applicants had accepted positions then later resigned, one applicant was hired for a position in a different building. The most qualified individuals were hired to fill the vacancies. David is completing his Associates degree then apply for Western Governor's Univeristy's program.

Applicant Name: Aspen Higens
Endorsement(s): All Subjects K-8
College Training: 90+ credits
Declared Emergency Date: 9/19/2022
Hire/Assignment Date: 7/18/2022
Summary of Recruitment Efforts: Not student teaching until the 23-24 school year. Position was posted from June 7th until August 5th. Twelve applicants were received, two of the applicants did not meet requirements to be considered for the position, on applicant had poor previous reviews, one applicant was hired for a different position and two applicants were hired at other schools within the district.

Applicant Name: Amy Hinojosa
Endorsement(s): English 6-12
College Training: BS
Declared Emergency Date: 8/29/2022
Hire/Assignment Date: 8/29/2022
Summary of Recruitment Efforts: Amy taught English in the 21-22 school year and was enrolled in the ABCTE program. She was unable to pass the assessments. She will be completing the program in the 22-23. Two applicants were received from August 18, 2022 to August 23, 2022.

Applicant Name: Jasmyn Rogge
Endorsement(s): All Subjects K-8
College Training: 81+ credits
Declared Emergency Date: 8/15/2022
Hire/Assignment Date: 8/15/2022
Summary of Recruitment Efforts: The position was posted from June 7th until August 5th. The administrator complete numerous interviews for the six positions available in the building. Twelve applications were received, two of the applicants did not meet the requirements to be considered for the position, one applicant had poor previous reviews, one applicant was hired for a different position, and two applicants were hired at other schools within the district. Jasmyn taught in the 21-22 school year and has been working towards her degree.

Oneida School District #351
Applicant Name: Tyler Cook
Endorsement(s): All Subjects K-8
College Training: 105+ credits

Declared Emergency Date: 8/23/2022
Hire/Assignment Date: 8/24/2022
Summary of Recruitment Efforts: With the lack of candidates, we are in need of middle school teachers at brick and mortar building. To fill some of the vacancies, the use of alternate routes to help teachers receive certifications. This teacher has been assigned an experienced teacher as a mentor. Position was posted the district's Frontline and District sites as well as K-12 job spot since January 2022.

American Falls School District #381
Applicant Name: Robert Crompton
Endorsement(s): Computer Science 6-12
College Training: BS
Declared Emergency Date: 8/30/2022
Hire/Assignment Date: 8/30/2022
Summary of Recruitment Efforts: The principal and the school did not properly communicate in regards to the conditions of the three-year interim requirements. They were not completed and recruitment efforts were not made in part of lack of communication.

Kellogg Joint School District #391
Applicant Name: Kara Langer
Endorsement(s): All Subjects K-8
College Training: BS
Declared Emergency Date: 11/8/2022
Hire/Assignment Date: 9/6/2022
Summary of Recruitment Efforts: School was under the impression she had three years to complete her education program and did not realize that they needed to apply for another provisional. Her employment was retained so the position was not opened up, and recruitment did not take place. Her educational program will not allow for student teaching in grades higher than 8th grade due to their consideration of elementary grades are 6th and below. She is currently teaching 8th grade. At the time of her hiring, there were zero applicants, finding it difficult to place someone.

Teton School District #401
Applicant Name: Shelley Alderson
Endorsement(s): All Subjects K-8
College Training: 75 credits
Declared Emergency Date: 8/1/2022
Hire/Assignment Date: 7/20/2022
Summary of Recruitment Efforts: Posted on Edjobs, district website. Only one application was received.

Applicant Name: Adrianna Green
Endorsement(s): All Subjects K-8
College Training: AA

Declared Emergency Date: 7/11/2022
Hire/Assignment Date: 6/13/2022
Summary of Recruitment Efforts: Posted on 5/3/2022 to the Edjobs, TeacherTeacher and the district website. Two kindergarten positions posted, and another kindergarten position was posted in March.

Twin Falls School District #411
Applicant Name: Michael Bourlotos
Endorsement(s): All Subjects K-8
College Training: 116+ credits
Declared Emergency Date: 9/12/2022
Hire/Assignment Date: 8/10/2022
Summary of Recruitment Efforts: All of the applicants that applied for this position had accepted other positions within the Twin Falls School District in other districts. Due to this position still being vacant the first day of school, there was a group interview held for several positions. The principal offered this candidate the position.

Applicant Name: Amelia Casares
Endorsement(s): All Subjects K-8
College Training: BS
Declared Emergency Date: 10/10/2022
Hire/Assignment Date: 10/5/2022
Summary of Recruitment Efforts: The teacher that previously applied for the position broke their contract and left the district. The current candidate applied and was offered the position to enable the school district to have a suitable replacement for in the classroom.

Applicant Name: Tanya Claar
Endorsement(s): All Subjects K-8
College Training: BA
Declared Emergency Date: 9/12/2022
Hire/Assignment Date: 8/10/2022
Summary of Recruitment Efforts: Fourteen applications were received and three were interviewed. Several of those applicants accepted positions elsewhere. Ms. Claar accepted the position for 1st grade teacher.

Applicant Name: Muriel English
Endorsement(s): Mathematics 6-12
College Training: 135+ credits
Declared Emergency Date: 9/12/2022
Hire/Assignment Date: 8/10/2022
Summary of Recruitment Efforts: The previous teacher that held this math position decided not to sign his 22-23 teaching contract towards the end of June. The current candidate was a classified employee that currently worked at CRHS

and after being interviewed by the principal, agreed to take on the job as a math teacher for the 22-23 school year.

Applicant Name: Sharon Finco
Endorsement(s): All Subjects K-8
College Training: 167+ credits
Declared Emergency Date: 9/12/2022
Hire/Assignment Date: 8/10/2022
Summary of Recruitment Efforts: The Twin Falls School District increased all of our kindergarten positions this year to full time positions. That left the task of hiring over 12 new teachers. Several positions were filled by either in-district transfers or new certified teachers. Also, candidates had several vacant positions they could choose from. This candidate was willing to step in and help for the 22-23 school year.

Applicant Name: Joseph Hawkes
Endorsement(s): Computer Science 6-12
College Training: BS
Declared Emergency Date: 10/10/2022
Hire/Assignment Date: 8/10/2022
Summary of Recruitment Efforts: The candidate accepted the position with the intent of attending the College of Southern Idaho's (CSI) program for a non-traditional route. He felt it was best not to continue with CSI and withdrew from the program.

Applicant Name: Angela Haycock
Endorsement(s): English 6-12
College Training: 139+ credits
Declared Emergency Date: 9/12/2022
Hire/Assignment Date: 8/10/2022
Summary of Recruitment Efforts: The former teacher broke their contract at the end of July. All applicants in the pool were not certified and due to short notice before the school year, the principal interviewed candidates that were in the building. He was able to move a classified employee to the teaching position.

Applicant Name: Morgan Kaster
Endorsement(s): All Subjects K-8
College Training: 84+ credits
Declared Emergency Date: 10/10/2022
Hire/Assignment Date: 8/10/2022
Summary of Recruitment Efforts: The candidate was hired with the understanding that she would finish her program in Spring of 2023. Her plan will not be completed until later, requiring an Emergency to continue teaching.

Applicant Name: Julian Kessel
Endorsement(s): All Subjects K-8

College Training: BS
Declared Emergency Date: 9/12/2022
Hire/Assignment Date: 8/10/2022
Summary of Recruitment Efforts: Thirteen applications were received and six were interviewed. All but one of the applicants interviewed for the ELA positions were offered other positions within the district. The current candidate was offered the position and accepted.

Applicant Name: Brinlee Lehman
Endorsement(s): All Subjects K-8
College Training: 96+ credits
Declared Emergency Date: 9/12/2022
Hire/Assignment Date: 8/10/2022
Summary of Recruitment Efforts: Several of the applicants that applied for this position also applied and accepted other positions in the district. The hiring pool left for this position was made up of non-certified applications. The candidate was the only candidate that accepted the position out of that pool.

Applicant Name: Linda Leiser
Endorsement(s): English 6-12
College Training: BS
Declared Emergency Date: 9/12/2022
Hire/Assignment Date: 8/10/2022
Summary of Recruitment Efforts: The teacher holding this position broke contract in the beginning of August. Due to this position being a core class for students, the current candidate was a classified employee, agreed to take over as the Speech teacher for the 22-23 school year.

Applicant Name: Denise Martin
Endorsement(s): All Subjects K-8
College Training: 95+ credits
Declared Emergency Date: 9/12/2022
Hire/Assignment Date: 8/10/2022
Summary of Recruitment Efforts: Due to increased enrollment at Perrine Elementary School, another 4th grade position had to be opened to keep class size equal. Everyone that applied for the open position was interviewed. The principal chose a classified employee within the district to move into the positions.

Applicant Name: Shelby Merrick
Endorsement(s): All Subjects K-8
College Training: 112+ credits
Declared Emergency Date: 9/12/2022
Hire/Assignment Date: 8/10/2022
Summary of Recruitment Efforts: Originally the plan for this position was to have one teacher teach 2nd/3rd grade split. However, when the candidate applied for

the 2nd grade position, the principal recommended him to teach under an emergency provisional for the 22-23 school year.

Applicant Name: Melissa Packer
Endorsement(s): All Subjects K-8
College Training: 100+ credits
Declared Emergency Date: 9/12/2022
Hire/Assignment Date: 8/10/2022
Summary of Recruitment Efforts: The school district increased all their kindergarten positions to full-time positions. Twelve new teachers were needed. Several positions were filled by in-district transfers or new certified teachers. The current candidate was a current classified employee that agreed to move to a certified position.

Applicant Name: Alexis Parra
Endorsement(s): CTE Family and Consumer Science 6-12
College Training: 103+ credits
Declared Emergency Date: 10/10/2022
Hire/Assignment Date: 08/10/2022
Summary of Recruitment Efforts: The position was offered to two candidates who declined before the current candidate accepted. She is not far enough along in her program to receive a three-year interim

Applicant Name: Jesse Poseley
Endorsement(s): All Subjects K-8
College Training: 64 credits
Declared Emergency Date: 9/12/2022
Hire/Assignment Date: 9/1/2022
Summary of Recruitment Efforts: The teacher who has this position for the 21-22 school year was hoping to go on a non-traditional route and receive a three-year interim certificate. However, the teacher was not able to meet the requirements and the school year started without a teacher. The principal offered the position to the current candidate who is currently a classified employee in the district.

Applicant Name: Tennille Smith
Endorsement(s): All Subjects K-8
College Training: BS
Declared Emergency Date: 9/12/2022
Hire/Assignment Date: 8/17/2022
Summary of Recruitment Efforts: This was a late position that opened due to student numbers. The candidate has just accepted a classified position at Morningside and then agreed to move into a certified teaching position.

Applicant Name: Avery Stirling
Endorsement(s): English 6-12

College Training: 66+ credits
Declared Emergency Date: 9/12/2022
Hire/Assignment Date: 8/10/2022
Summary of Recruitment Efforts: Although five applications were received, all but one had been hired in other teaching positions. Due to the beginning of the school year starting, the principal interviewed and recommended the candidate to fill the position.

Applicant Name: Trina Waugh
Endorsement(s): All Subjects K-8
College Training: 70+ credits
Declared Emergency Date: 10/10/2022
Hire/Assignment Date: 8/10/2022
Summary of Recruitment Efforts: The candidate was hired with the understanding that she would finish her program in Spring of 2023. Her plan will not be completed until later, requiring an Emergency to continue teaching.

Applicant Name: Amanda White
Endorsement(s): All Subjects K-8
College Training: AA
Declared Emergency Date: 9/12/2022
Hire/Assignment Date: 8/10/2022
Summary of Recruitment Efforts: This was filled by an out of state candidate who had to move back to their home state. The candidate was currently working as a classified employee working towards a teaching degree. The principal offered the position to her and she accepted.

Compass Public Charter School #455
Applicant Name: Kimberly Hermann
Endorsement(s): All Subjects K-8
College Training: 54+ credits
Declared Emergency Date: 7/14/2022
Hire/Assignment Date: 8/1/2022
Summary of Recruitment Efforts: School had 11 applicants and nine vacancies to fill the elementary program. Two candidates were made offers to, but took positions elsewhere. Positions were recruited through SchoolSpring and Handshake, four colleges, plus attended the BSU Education job fair.

Sage International School of Boise #475
Applicant Name: Eric Oliver
Endorsement(s): CTE-OS Work Based Learning Coordinator
College Training: MA
Declared Emergency Date: 8/30/2022
Hire/Assignment Date: 8/1/2022
Summary of Recruitment Efforts: The vacancy was only to teach one CTE class. The school applied for the incorrect Charter School Specific application, CTE does

require additional requirements which the candidate did not meet. School applying for an emergency.

Gem Prep: Pocatello, LLC #496
Applicant Name: Hernan Martinez
Endorsement(s): Social Studies 6-12
College Training: 164+ credits
Declared Emergency Date: 7/21/2022
Hire/Assignment Date: 8/2/2022
Summary of Recruitment Efforts: Position was posted on career page and educational websites. A candidate had initially accepted the position in April of 2022, but withdrew in May. Other candidates were contacted, but had secured employment elsewhere. ISU College of Education was contacted to increasing candidate pool.

Forge International School #528
Applicant Name: Jarrett Ellsworth
Endorsement(s): Physical Education K-12
College Training: 90+ credits
Declared Emergency Date: 9/19/2022
Hire/Assignment Date: 8/1/2022
Summary of Recruitment Efforts: The Board of Trustees declared an emergency for their PE class. The position was posted to the Sage International Network School website, along with SchoolSpring the same day they were notified they needed the position filled. Three applications were received who were deemed not qualified. Jarrett has been a capable and engaging teacher for many years and has experience coaching kids of all ages. This is a third Emergency Provisional for Jarrett.

Idaho Arts Charter School #795
Applicant Name: Jessica VanderVeen
Endorsement(s): All Subjects K-8
College Training: AA
Declared Emergency Date: 9/12/2022
Hire/Assignment Date: 11/2021
Summary of Recruitment Efforts: The transition of leadership caused some miscommunication. The previous director worked with the candidate in Spring of 2022 for the upcoming contract for the 22-23 school year, with the impression the candidate would complete all coursework by Summer of 2022. She was unable to complete the coursework and the school was not made aware until September of 2022. This resulted in zero recruitment. The school has had difficulty recruiting teachers due to a shrinking pool and located in a more soci-economically diverse city. She has demonstrated she is a solid instructor.

Pupil Service Staff Certificate – School Counselor, Speech-Language Pathologist, and School Psychologist Applications

Bonneville Joint School District #093
Applicant Name: Sherrie Burdick
Endorsement(s): School Psychologist
College Training: BA
Declared Emergency Date: 8/10/2022
Hire/Assignment Date: 8/25/2022
Summary of Recruitment Efforts: Four School Psychologists have resigned to pursue interests in other states and districts. This has left the school at a significate deficit in resources when it comes to serving the very vulnerable special education population in the school district. This candidate is pursuing a route to receive the School Psychologist endorsement.

Applicant Name: Kerilyn Hinman
Endorsement(s): Speech-Language Pathologist (SLP)
College Training: BS
Declared Emergency Date: 10/12/2022
Hire/Assignment Date: 8/29/2022
Summary of Recruitment Efforts: SLP position was advertised for several months and received three applicants. Two were certified, but took positions in other districts. The candidate is currently enrolled in the SLP program with ISU, but did not hold a bachelor's degree in Speech-Language Pathology. She will graduate in December.

Cassia County School District #151
Applicant Name: Sally Hall
Endorsement(s): School Counselor
College Training: BA
Declared Emergency Date: 10/21/2021
Hire/Assignment Date: 4/19/2021
Summary of Recruitment Efforts: Second emergency application. Complications with scheduling health issues with candidate. District did not recruit for position. Candidate's new program will begin in July of 2023. Pursing LPC route due to change in law.

Jerome School District #261
Applicant Name: Courtney Coleman
Endorsement(s): School Psychologist
College Training: BS
Declared Emergency Date: 10/25/2022
Hire/Assignment Date: 8/1/2022
Summary of Recruitment Efforts: Candidate is currently enrolled in a Master's program for School Psychologist, but does not meet requirements for an interim certificate. Two positions opened at the beginning of the school year, interviewing both candidates that applied. One applicant did not accept the position, leaving

one open. The current candidate has been a valued member of the schools and would be a great fit.

Post Falls School District #273
Applicant Name: Allison Hulett
Endorsement(s): School Psychology
College Training: BS
Declared Emergency Date: 6/13/2022
Hire/Assignment Date: 8/2/2022
Summary of Recruitment Efforts: Position was open for the majority of the 21-22 school year due to a resignation at the end of 20-21 school year. There have been no qualified applicants for the position.

IMPACT

If an emergency provisional certificate is not approved, the school district will have no certificated staff to serve in the position as required by Idaho Code §33-1201 and funding could be impacted.

BOARD STAFF COMMENTS AND RECOMMENDATIONS

Pursuant to Section 33-1201, Idaho Code, "every person who is employed to serve in any public elementary or secondary school in the capacity of teacher, supervisor, administrator, education specialist, school nurse or school librarian shall be required to have and to hold a certificate issued under the authority of the State Board of Education…." Section 33-1203, Idaho Code, prohibits the Board from authorizing standard certificates to individuals who have less than four (4) years accredited college training, except in "the limited fields of trades and industries, and specialists certificates of school librarians and school nurses." In the case of emergencies, which must be declared, "the State Board may authorize the issuance of provisional certificates based on not less than two (2) years of college training."

Section 33-512(15), Idaho Code, defines substitute teachers as "as any individual who temporarily replaces a certificated classroom educator…." Neither Idaho Code, nor administrative rule, limits the amount of time a substitute teacher may be employed to cover a classroom. In some cases, school districts use a long-term substitute prior to requesting emergency provisional certification for the individual. The individual that the school district is requesting emergency certification for may have been in the classroom as a long-term substitute for the entire school term. Salary based apportionment is calculated based on school district employee certification. A school district or charter school receives a lesser apportionment for noncertificated/classified staff than it receives for certificated staff. Substitute teachers are calculated at the classified staff rate.

The Department staff have forwarded those applications they recommend for approval for Board consideration. Emergency Provisional Certificates and Endorsements may be issued to an uncertified person with the minimum amount

of training or may be issued to individuals with an existing certificate and endorsement outside of the area in which they have been hired. In the case of someone hired outside of the subject area they are endorsed to teach in, the Emergency Provision Certificate/Endorsement is for the endorsement area.

BOARD ACTIONS

I move to approve the request by State Department of Education for one-year emergency provisional certificates in the Instructional and CTE endorsement area(s) at the specified school districts as provided herein for the 2022-2023 school year for the following individuals: Waylon Wagner, Michael Ebert, Arynn Gomez, Corrie Cagle, Heather Gillette, Heather Jenkins, Kaiden Prestwich, Scott Hymas, Kassandra Skeen, Crystal Reynolds, Kortnee Fleming, S. Mark Hansen Jr, Torrey Thomas, Rebecca Lauti, Talon Sudbeck, Taylor Spurrier, Kimberly Hammond, Beatriz Nava, Shalamar Packer, Tammy Thompson, Jamie Lamb, Jessica Dice, Hailie Wilds, Brandy Kay, Mitchel Maxfield, Katrina Rone, Averi Adams, Riley Johnson, Cassidy McLaughlin, Dana Nordhagen, Hannah Harris, Erika Arellano, Sara Bateman, Jessica Reynoso, Denae Robinson, Tracie Yankoff, Susan Bissell, Torrie McKellar, Lacie Salisbury, Melanie Spicer, Amanda Huddleston, Katie Hillin, Colter Larsen, Wesley Naylor, Gregory Yorgason, Dale Dayley, Margarita Espinoza-Henscheid, Kristy Herbert, David Hernandez, Aspen Higens, Amy Hinojosa, Jasmyn Rogge, Tyler Cook, Robert Crompton, Kira Langer, Shelley Alderson, Adrianna Green, Michael Bourlotos, Amelia Casares, Tanya Claar, Muriel English, Sharon Finco, Joseph Hawkes, Angela Haycock, Morgan Kaster, Julian Kessel, Brinlee Lehman, Linda Leiser, Denise Martin, Shelby Merrick, Melissa Packer, Alexis Parra, Jesse Poseley, Tennille Smith, Avery Stirling, Trina Waugh, Amanda White, Kimberly Hermann, Eric Oliver, Hernan Martinez, Jarrett Ellsworth, Jessica VanderVeen

Moved by _____ Seconded by _____ Carried Yes _____ No _____

BOARD ACTIONS

I move to approve the request by State Department of Education for one-year emergency provisional certificates in the School Psychologist endorsement area at the specified school districts as provided herein for the 2022-2023 school year for the following individuals: Sherrie Burdick, Kerilyn Hinman, Sally Hall, Courtney Coleman, Allison Hulett

Moved by _____ Seconded by _____ Carried Yes _____ No _____

SUBJECT

Adoption of Praxis II Tests and Idaho Qualifying Scores

REFERENCE

August 2018	Board approved Content, Pedagogy and Performance Assessments rubric and updated content area assessments and cut scores
February 2020	Board approved Praxis II assessments and Idaho cut scores and amended the Content, Pedagogy and Performance Assessments rubric
February 2021	Board accepted the Professional Standards Commission recommendation to approve Praxis II assessments and Idaho cut scores
April 2022	Board accepted the Professional Standards Commission recommendation to approve proposed Praxis II assessments and Idaho cut scores.
June 2022	Board accepted the Professional Standards Commission recommendation to approve proposed Praxis II assessments and Idaho cut scores.

APPLICABLE STATUTE, RULE, OR POLICY

IDAPA 08.02.02. Rules Governing Uniformity

BACKGROUND/DISCUSSION

One of the requirements for obtaining a Standard Instructional Certificate is that proficiency be shown in the area of endorsement being sought (IDAPA 08.02.02.015.01.d). Each candidate must meet or exceed the state qualifying score on the State Board of Education (Board) approved content area assessment. Praxis II – Subject Assessments have been selected as one of the Board approved content area assessments. In accordance with IDAPA 08.02.02.017.01, the Professional Standards Commission recommends the following amendments to assessments and qualifying scores to the Board for approval:

- Addition of Praxis II assessment for world language – Russian, with a multi-state qualifying score of 130
- Removal of the Performance Assessment for Teacher Leaders (PATL) for teacher leader endorsements

On September 16, 2022, the full PSC voted to recommend these amendments to the State Board of Education.

IMPACT

Approval of assessments and cut scores ensures compliance with Idaho Administrative Code.

ATTACHMENTS

Attachment 1 – ETS Praxis II Assessments AND Cut Scores

BOARD STAFF COMMENTS AND RECOMMENDATIONS

Pursuant to IDAPA 08.02.02.017, the Professional Standards Commission (PSC) recommends assessments and qualifying scores to the State Board of Education for approval. While the PSC is required to make recommendations to the Board in this area, the Board may also approve assessments and qualifying scores that have not been considered by the PSC. IDAPA 08.02.02. includes multiple references to requirements for instructional staff candidates to receive a qualifying score on a state-approved content area, pedagogy, or performance assessment as applicable to the route or type of certification. The Praxis II is one of the Board-approved content area assessments. Receiving a qualifying score on a content area assessment is required for earning a standard instructional certificate, career technical degree-based certification, alternate routes for content area endorsements, and interim certification through an alternative authorization for content specialist. The PRAXIS II was approved by the Board in early 2000. Qualifying scores were set by the Board based on recommendations from the PSC at the December 2003 Board meeting, effective September 1, 2004. A few updates to the qualifying scores in individual subject areas were made at the June 2005, April 2006, June 2006, October 2006 and February 2018 Board meetings. Starting in 2019, updates have come to the Board more regularly. Consideration of the attached qualifying scores is part of the ongoing process to maintain updated qualifying scores on Board-approved content, pedagogy or performance assessments. In February 2020, the Board requested the PSC to include in their consideration and make recommendations on additional types of assessments that could serve as content, pedagogy, or performance assessment for certification purposes. The PRAXIS is the only assessment that the PSC has recommended at this time. The Board approved a mastery-based assessment and scoring rubric for determining the qualifying score in 2018 based on Board staff work and stakeholder input.

IDAPA 08.02.02 requires individuals serving as a paraprofessional with only a high school diploma or general equivalency diploma to also demonstrate through a Board-approved academic assessment knowledge of and the ability to assist in instruction or preparing student to be instructed. To date, the Board has not approved an assessment for this purpose. Board staff received a complaint regarding the assessment in early November and the requirement that paraprofessionals take the assessment. In discovering school districts were hiring individual as paraprofessional with only a high school diploma without a Board approved assessment Board staff started work with the IASA to identify assessments that could be used for the Board's consideration. At the same time Board staff requested that Department certification staff include the Paraprofessional PRAXIS and what they had been using as a qualifying score when they put forward the current request for the Board to approve amendments to the PRAXIS assessments and qualifying scores. The assessment and the

current qualifying score for paraprofessionals were not included in this agenda item. Board staff will work with Department staff to bring forward a solution at the February 2023 Board meeting.

BOARD ACTION

I move to accept the recommendation of the Professional Standards Commission to approve the proposed Praxis II assessments and Idaho cut scores as provided in Attachment 1.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

Standard Instructional Certificate

Endorsement Code	Endorsement	Content/ Grade Level	ETS Praxis II Subject Assessment	Idaho Cut Score	Multi State Cut Score
7010	All Subjects (Candidates can take 5001 OR 7811)	(K-8)	Elementary Education: 5002 Reading and Language Arts Subtest AND	157	157
			Elementary Education: 5003 Mathematics Subtest AND	157	157
			Elementary Education: 5004 Social Studies Subtest AND	155	155
			Elementary Education: 5005 Science Subtest	159	159
7010	All Subjects (Candidates can take 5001 OR 7811)	(K-8)	CKT Elementary Education: 7812 Reading and Language Arts Subtest AND	161	161
			CKT Elementary Education: 7813 Mathematics Subtest AND	150	150
			CKT Elementary Education: 7814 Science Subtest AND	154	154
			CKT Elementary Education: 7815 Social Studies Subtest	161	161
8222	American Government/Political Science	(5-9)	5089 Middle School Social Studies	149	-
7222		(6-12)	5931 Government/Political Science	149	149
7770	American Indian Language	(K-12)	-	-	-
7038	Bilingual Education	(K-12)	5362 English to Speakers of Other Languages	155	155
8421	Biological Science	(5-9)	5442 Middle School Science	152	152
7421		(6-12)	5236 Biology	154	154
7083	Blended Early Childhood Education/Early Childhood Special Education	(Birth-Grade 3)	5025 Early Childhood Education OR Elementary Subtests (See All Subjects 5001 or 7811) AND	156	156
			5692 Special Education: Early Childhood/Early Intervention	159	159
7014	Blended Elementary Education/Elementary Special Education	(Grade 4-6)	Elementary Subtests (See All Subjects 5001 or 7811)	See All Subjects	See All Subjects
8440	Chemistry	(5-9) (6-12)	5442 Middle School Science	152	152
7440		(6-12)	5246 Chemistry	146	146
8144	Communication	(5-9)	5221 Speech Communication: Content Knowledge	143	-
7144		(6-12)			
8400	Computer Science	(5-9)	5652 Computer Science	149	149
7400		(6-12)			
9921	CTE - Agriculture Science & Technology	(6-12)	5701 Agriculture	147	147
9093	CTE - Business Technology Education	(6-12)	5101 Business Education: Content Knowledge	148	154
9400	CTE - Computer Science	(6-12)	5652 Computer Science	149	149
9401	CTE - Engineering	(6-12)	5051 Technology Education	154	159
9970	CTE - Family and Consumer Sciences	(6-12)	5122 Family and Consumer Sciences	153	153
9092	CTE - Marketing Technology Education	(6-12)	5561 Marketing Education	158	-
9981	CTE - Technology Education	(6-12)	5051 Technology Education	154	159
7030	Deaf/Hard of Hearing	(Pre-K-12)	5354 Special Education: Core Knowledge and Applications AND	145	151
			5272 Special Education: Education of Deaf and Hard of Hearing Students	160	160
7019	Early Childhood Special Education	(Pre-K-3)	5025 Early Childhood Education OR Elementary Multiple Subtests (See All Subjects 5001 or 7811) AND	156	156
			5691 Special Education: Preschool/Early Childhood	159	159
8451	Earth and Space Science	(5-9)	5442 Middle School Science	152	152
7451		(6-12)	5572 Earth and Space Sciences	154	154
8228	Economics	(5-9)	5089 Middle School Social Studies	149	-
7228		(6-12)	5911 Economics	150	150
8990	Engineering	(5-9)	5051 Technology Education	154	159
7990		(6-12)			
8120	English	(5-9)	5047 Middle School English Language Arts	164	164
7120		(6-12)	5038 English Language Arts: Content Knowledge	167	167
7126	English as a Second Language (ESL)	(K-12)	5362 English to Speakers of Other Languages	155	155
7036	Exceptional Child Generalist	(K-8)	5543 Special Education: Core Knowledge and Mild to Moderate Applications AND Elementary Subtests (See All Subjects 5001 or 7811)	153	158
7037		(6-12)		See All Subjects	See All Subjects
7029		(K-12)			
8226	Geography	(5-9)	5089 Middle School Social Studies	149	-
7226		(6-12)	5921 Geography	153	-
8452	Geology	(5-9)	5442 Middle School Science	152	152
7452		(6-12)	5572 Earth and Space Sciences	154	154
7028	Gifted and Talented	(K-12)	5358 Gifted Education	157	157
8520	Health	(5-9)	5551 Health Education	155	-
7520		(6-12)			
7521		(K-12)			
8221	History	(5-9)	5089 Middle School Social Studies	149	-
7221		(6-12)	5941 World and U.S. History: Content Knowledge	141	-
8133	Humanities	(5-9)	-	-	-
7133		(6-12)			
8134	Journalism	(5-9)	5224 Journalism	153	153
7134		(6-12)			
7080	Junior ROTC	(6-12)	-		
7139	Literacy	(K-12)	5206 Teaching Reading	156	156
8320	Mathematics - Middle Level	(5-9)	5164 Middle School Mathematics	157	157
7300	Mathematics	(6-12)	5165 Mathematics	159	159
8820	Music	(5-9)	5113 Music: Content Knowledge	148	161
7820		(6-12)			
7810		(K-12)			
7420	Natural Science	(6-12)	5436 General Science	141	141
7989	Online-Teacher	(Pre-K-12)	-	-	-
8510	Physical Education (PE)	(5-9)	5091 Physical Education: Content Knowledge	143	-
7512		(6-12)			
7511		(K-12)			
8430	Physical Science	(5-9)	5442 Middle School Science	152	152
7430		(6-12)	5485 Physical Science	157	157
8450	Physics	(5-9)	5442 Middle School Science	152	152
7450		(6-12)	5266 Physics	145	145
8231	Psychology	(5-9)	5391 Psychology	154	154
7231		(6-12)			
8453	Science - Middle Level	(5-9)	5442 Middle School Science	152	152
7200	Social Studies	(6-12)	5081 Social Studies: Content Knowledge	150	-
8220	Social Studies - Middle Level	(5-9)	5089 Middle School Social Studies	149	-
8229	Sociology	(5-9)	5952 Sociology	154	154
7229		(6-12)			
8236	Sociology/Anthropology	(5-9)	5952 Sociology	154	154
7236		(6-12)			
7297	Teacher Leader - Instructional Specialist (K-12)	-	~~Performance Assessment for Teacher Leaders (PATL)~~	~~42~~	~~-~~

Standard Instructional Certificate

Endorsement Code	Endorsement	Content/ Grade Level	ETS Praxis II Subject Assessment	Idaho Cut Score	Multi State Cut Score
7298	Teacher Leader - Literacy (K-12)	-	~~Performance Assessment for Teacher Leaders (PATL) + one of the following:~~	~~42~~	-
			5206 Teaching Reading (OR)	156	156
			5302 Reading Specialist	165	165
7299	Teacher Leader - Mathematics	-	~~Performance Assessment for Teacher Leaders (PATL) + one of the following:~~	~~42~~	-
			5164 Middle School Mathematics (OR)	157	157
			5165 Mathematics (OR)	159	159
			5037 Elementary Education: Math Specialist	153	153
7045	Teacher Leader - Special Education	-	~~Performance Assessment for Teacher Leaders (PATL)~~	~~42~~	-
7020	Teacher Librarian	(K-12)	5312 School Librarian	154	154
8137	Theater Arts	(5-9)	5641 Theatre	148	-
7137		(6-12)			
8852	Visual Arts	(5-9)	5134 Art: Content Knowledge	151	158
7852		(6-12)			
7851		(K-12)			
7035	Visual Impairment	(Pre-K-12)	5354 Special Education: Core Knowledge and Applications AND	145	151
			5282 Special Education: Teaching Students with Visual Impairments	163	163
8700	World Language (All other languages not listed below)	(5-9)	5841 World Language Pedagogy	151	158
7700		(6-12)			
7710		(K-12)			
8702	World Language - American Sign Language	(5-9)	0634 American Sign Language Proficiency Interview (ASLPI) by Gallaudet	3 (score is equivalent to a 160 scale score)	160
7702		(6-12)			
7701		(K-12)			
8796	World Language - Chinese	(5-9)	5665 Chinese (Mandarin): World Language	164	164
7796		(6-12)			
7715		(K-12)			
8830	World Language - French	(5-9)	5174 French: World Language	156	162
7730		(6-12)			
7712		(K-12)			
8740	World Language - German	(5-9)	5183 German: World Language	157	163
7740		(6-12)			
7713		(K-12)			
7792	World Language - Japanese	(K-12)	5661 Japanese: World Language	156	156
7750	World Language - Latin	(K-12)	5601 Latin	152	-
7714	World Language - Russian	(L-12)	5671 Russian: World Language	130	130
8720	World Language - Spanish	(5-9)	5195 Spanish: World Language	163	168
7720		(6-12)			
7711		(K-12)			

SUBJECT

FY 2024-2028 K-20 Education Strategic Plan

REFERENCE

September 2017	The Board adopted the Higher Education Task Force recommendations; including the recommendation, the Board restate the 60% educational attainment goal to: "By the year 2025, Idaho's colleges and universities will award enough degrees and certificates to meet the education and forecasted workforce needs of all Idaho citizens necessary to survive and thrive in the changing economy and that by June 30, 2025, 60% of the state's citizens between the ages of 25-34 shall have a postsecondary education."
December 2018	Board reviewed the draft K-20 Education Strategic Plan and discussed setting institution level credential production goals by level of credential.
February 2019	Board approved updated K-20 Education Strategic Plan, reviewed data on Idaho's workforce education gap and potential credential production targets. Directed staff to do additional work with the Department of Labor, Department of Commerce, Workforce Development Council, and Governor's Office on identifying workforce need and production targets.
June 2019	Board approved updated FY20-FY24 Institution, Agency, and Special/Health program strategic plans.
October 2019	Board reviewed K-20 Education System performance during the Work Session and Literacy Growth Targets during the Planning, Policy and Governmental Affairs portions of the agenda
February 2020	Board approved amendments to the FY21 K-20 Education Strategic Plan.
May 2020	The Board discussed amendments to the Board's K-20 Strategic plan as part of a facilitated Board retreat.
June 2020	Board approved the institutions and agencies strategic plans and delegated approval of the health and special program plans to the Executive Director.
August 2020	Board approved a new mission and vision statement for the K-20 Education Strategic plan.
October 2020	Board reviewed K-20 Education System performance measures.
December 2020	Board discussed possible amendments to the K-20 Education Strategic Plan.
February 2021	Board approved annual updates to the FY 2022-2026 K-20 Education Strategic Plan.

October 2021	Board reviewed K-20 Education System performance measures and discussed identifying three postsecondary focus areas.
December 2021	Board discussed possible amendments to the K-20 Education Strategic Plan.
February 2022	Board approved annual updates to the FY 2022-2026 K-20 Education Strategic Plan.
October 2022	Board reviewed K-20 Education System performance measures and discussed identifying three postsecondary focus areas.

APPLICABLE STATUTE, RULE, OR POLICY

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

BACKGROUND/ DISCUSSION

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 obligations 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, the Department of Education, Division of Career Technical Education, Public Charter School Commission, Idaho Public Television, and the Division of Vocational Rehabilitation. The Board and its executive agencies 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 public education in Idaho, providing general oversight and governance for public K-20 education, and 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 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, and to the public and other stakeholder groups.

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. At the October regular Board meeting, the Board received the performance measures from the K-20 Education Strategic Plan as well as the performance measure reports for the agencies, institutions, and special and health programs under the Boards governance and oversight. The discussion during the October 2022 Regular Board meeting focused on the K-12 performance measures and an emphasis on the Idaho's statewide assessment achievement growth in proficiency based on cohorts of students.

Section 67-2903, Idaho Code, and Board Policy I.M. 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. The state strategic planning requirements are identified in Attachment 3.

IMPACT

Based on the discussion during the Work Session, staff will bring back final edits to the K-20 Education Strategic Plan for the Board's consideration at the February 2023 Board meeting. Once the Board has approved the updated strategic plan, the agencies, institutions and special/health programs will update their strategic plans for the Board's consideration in April 2023.

ATTACHMENTS

Attachment 1 – Postsecondary Credentials Awarded
Attachment 2 – FY 2023 K-20 Strategic Plan
Attachment 3 – FY 2022 K-20 Education Performance Measures
Attachment 4 – Postsecondary System-wide Performance Measures
Attachment 5 – State Strategic Planning Requirements
Attachment 6 – Board's Master Planning Calendar

BOARD STAFF COMMENTS AND RECOMMENDATIONS

At its October 2022 regular meeting, the Board reviewed the performance of Idaho's K-20 education system based on progress towards the benchmarks and performance targets of the K-20 Education Strategic Plan, including the identification of a number of benchmarks that are being met. The Board took a deep dive into the metrics used to measure student proficiency and student cohort growth with a focus on the Board's three K-12 priority areas: K-4 literacy/English language arts, grades 5-9 mathematics, and high school credit recovery. In order to have time to discuss the student achievement and growth data at the October 2022 Board meeting, the Work Session focused on the K-12 portion of the K-20 strategic plan and the postsecondary measures were postponed to the December Work Session. The postsecondary institution performance measures may be viewed in the October 2022 Regular Board meeting agenda material located at: October 2022 07WORKSESSION.pdf (idaho.gov).

At the February 2022 Regular Board meeting the Board approved the inclusion of the following postsecondary focus areas:

- Recruitment and Access
- Retention
- Attainment and Transfer

As part of this work, the Board also set benchmarks for postsecondary credential awards, broken out by credential level and institution. As a follow-up to that action the Board will have the opportunity to look at the most recent credential report to determine if they would like to make adjustments to the current benchmarks or set new benchmarks at the February 2023 Regular Board meeting.

The December strategic planning work session is intended to provide an opportunity for the Board to discuss its strategic priorities and identify any amendments the Board would like to make to the K-20 Education Strategic Plan as well as provide direction on performance measure reporting and strategic planning for the agencies and institutions under the Board's governance and oversight. The K-20 Education Strategic Plan serves as the state's plan for Idaho's K-20 education system and is aligned to Idaho's constitutional responsibility for a uniform, thorough and free public education system. In recent years, added focus has been on performance measures around thoroughness, college and career readiness, and access to quality programs at the elementary, secondary and postsecondary levels.

BOARD ACTION

This item is for informational purposes only.

ATTACHMENT 1

Total number of certificates/degrees conferred, by institution per year:

a) Workforce Credentials (pending definition)
b) Certificates
c) Associate degrees
d) Baccalaureate degrees
e) Graduate degrees

Total number of certificates/degrees produced, by institution annually		Benchmark FY 2025	Benchmark FY2027
Workforce Certificates (based on certificates of less than one academic year)			
College of Eastern Idaho			
College of Southern Idaho		142	150
College of Western Idaho		301	335
North Idaho College		92	
Certificates of at least one academic year		**4437[1]/1262[2]**	**2154**
College of Eastern Idaho		241	300
College of Southern Idaho		195	207
College of Western Idaho		365	402
North Idaho College		117	764
Boise State University		NA	NA
Idaho State University		319	455
Lewis-Clark State College		25	26
University of Idaho		NA	NA
Associate degrees		**4070/4157**	**4378**
College of Eastern Idaho		517	530
College of Southern Idaho		1067	1132
College of Western Idaho		981	1049
North Idaho College		700	800
Boise State University		150	NA
Idaho State University		467	579
Lewis-Clark State College		275	288
University of Idaho		NA	NA
Baccalaureate degrees		**11897/7896**	**12911**
Boise State University		4351	6668
Idaho State University		1209	2306
Lewis-Clark State College		534	559
University of Idaho		1802	3378
Masters degrees		**2146**	**2226**
Doctoral or Professional degrees		**1069**	**1305**

[1] Targets based on projected work force need
[2] Institution recommended target based on current awards and projected growth in student enrollment, retention, and completion.

ATTACHMENT 2

Idaho State Board of Education

~~FY2023~~FY2024-~~2028~~2029

Idaho K-20 Public Education - Strategic Plan

MISSION

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

VISION

A student-centered education system that creates opportunities for all Idahoans to improve their quality of life.

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.

ATTACHMENT 2

Idaho State Board of Education

FY2023-2028
Idaho K-20 Public Education - Strategic Plan

An Idaho Education: High Potential – High Achievement

MISSION STATEMENT

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

VISION STATEMENT

A student-centered education system that creates opportunities for all Idahoans to improve their quality of life.

GUIDING VALUES

- Access
- Innovation
- Preparedness
- Resilience

MID-TERM PRIORITY FOCUS AREAS

Elementary and Secondary Education

- Literacy Proficiency and Growth – kindergarten through grade 4
- Mathematics Proficiency and Growth – grades 5 through 9
- High School Credit Recovery, Completion, and Transition (Workforce or Postsecondary)

Postseconday Education

- Recruitment and Access
- Retention
- Transfer and Completion

ATTACHMENT 2

GOAL 1: EDUCATIONAL SYSTEM ALIGNMENT (systemness) – 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 FY2022

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% 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 20%[3]
   4 year – less than 20%[3]

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 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.

Performance Measures:

I. **Performance of students scoring at grade level or higher on the statewide reading assessment (broken out by grade level, K-3).**
   Benchmark:

Idaho Reading Assessment	Benchmark
Kindergarten	70%
1st Grade	70%
2nd Grade	80%

ATTACHMENT 2

3rd Grade	80%

II. Growth Fall to Spring of student cohorts scoring at grade level or higher on the statewide reading assessment (broken out by grade level, K-3).

Benchmark:

Idaho Reading Assessment	Benchmark
Kindergarten Cohort	55%
1st Grade	55%
2nd Grade	65%
3rd Grade	65%

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	Benchmark
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	FY22 Baseline
High School	FY22 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: 90%[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 (withing following academic year[1]) of high school graduation.
Benchmark: 60%[3] or more
Within 36 months (three academic years) 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: 70%

GOAL 3: EDUCATIONAL ATTAINMENT (opportunity) – Idaho's public colleges and universities and career technical education programs fuel a strong workforce pipeline evidenced through a greater numbers of student completing certificates and/or degrees, including workforce credentials.

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

Performance Measures:

II. Total number of certificates/degrees conferred, by institution per year:
a) Workforce Credentials (pending definition)
b) Certificates
c) Associate degrees
d) Baccalaureate degrees
e) Graduate degrees

Total number of certificates/degrees produced, by institution annually		Benchmark FY 2025	Benchmark FY2027
Workforce Certificates (based on certificates of less than one academic year)			
College of Eastern Idaho			
College of Southern Idaho		142	150
College of Western Idaho		301	335
North Idaho College		92	
Certificates of at least one academic year		**4437[2]/1262[3]**	**2154**
College of Eastern Idaho		241	300
College of Southern Idaho		195	207

[1] Academic year = fall, spring, and summer terms starting with the fall term.
[2] Targets based on projected work force need
[3] Institution recommended target based on current awards and projected growth in student enrollment, retention, and completion.

ATTACHMENT 2

College of Western Idaho		365	402
North Idaho College		117	764
Boise State University		NA	NA
Idaho State University		319	455
Lewis-Clark State College		25	26
University of Idaho		NA	NA
Associate degrees		**4070/4157**	**4378**
College of Eastern Idaho		517	530
College of Southern Idaho		1067	1132
College of Western Idaho		981	1049
North Idaho College		700	800
Boise State University		150	NA
Idaho State University		467	579
Lewis-Clark State College		275	288
University of Idaho		NA	NA
Baccalaureate degrees		**11897/7896**	**12911**
Boise State University		4351	6668
Idaho State University		1209	2306
Lewis-Clark State College		534	559
University of Idaho		1802	3378
Masters degrees		**2146**	**2226**
Doctoral or Professional degrees		**1069**	**1305**

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. **Proportion of postsecondary graduates with student loan debt.**
Benchmark: 40% or less[5]

II. **Percent of students who complete the Free Application for Federal Student Aid (FAFSA).**
Benchmark: 60% or more

III. **Percent cost of attendance** (to the student)
Benchmark: 96%[4] or less of average cost of peer institutions

IV. **Average net price to attend public institution.**
Benchmark: 4-year institutions - 90% or less of peers[4] (using IPEDS calculation)

V. **Average net price differential.** (This measure looks at the average net price between students in the highest family income band and the lowest family income band)
Benchmark: TBD (using IPEDS calculation)

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

VII. **Unduplicated headcount of graduates, by highest level attained by academic year.**
Benchmark: TBD

GOAL 4: WORKFORCE READINESS (opportunity) – 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.

Performance Measures:

I. **Percentage of high school student participating in apprenticeships and postsecondary students participating in internships.**

Benchmark: New measure

II. **Percent of non - STEM to STEM baccalaureate degrees conferred in STEM fields** (CCA/IPEDS Definition of STEM fields).
Benchmark: 25%

III. **Increase in secondary career technical programs and postsecondary programs tied to workforce needs per year.**
Benchmark: 50[6] 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[7] graduates at any one time

II. **Idaho graduates who participated in one of the state sponsored medical programs who returned to Idaho.**
Benchmark: 60%[8] or more

III. **Percentage of Family Medicine Residency graduates practicing in Idaho.**
Benchmark: 80%[8] or more

IV. **Percentage of Psychiatry Residency Program graduates practicing in Idaho.**
Benchmark: 50%[8] or more

V. **Medical related postsecondary programs (other than nursing).**
Benchmark: 120[6] 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] 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.
[6] New measure.
[7] Benchmark is set based on projected and currently available state resources.
[8] 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.

K-20 Education Strategic Plan Performance Measures FY 2022

	FY2016	FY2017	FY2018	FY2019	FY2020	FY2021	FY2022	Benchmark
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.								
Development of a single K-20 data dashboard and timeline for implementation								FY2021
Objective B: Alignment and Coordination -Ensure the articular and transfer of students throughout the education pipeline.								
Percent of graduates from Four-year institution who transferred from Idaho community college1	15%	15%	15%	15%	14%	14%	17%	25% or more
Percent of postsecondary first time freshmen who graduated from an Idaho high school in the previous year requiring remedial education in math and/or language arts[1]	2014-15 graduates	2015-16 graduates	2016-17 graduates	2017-18 graduates	2018-19 graduates	2019-20 graduates	2020-21 graduates	
Two-year institution								Less than 55%
Math	51.0%	49.8%	46.2%	41.7%	39.6%	29.9%	25.7%	
English	24.3%	25.7%	19.1%	15.1%	15.3%	13.9%	13.1%	
Four-year institution								Less than 20%
Math	34.7%	36.2%	36.1%	34.9%	30.6%	26.1%	20.3%	
English	14.7%	14.9%	14.9%	15.2%	11.9%	10.6%	13.9%	
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.								
Objective A: Rigorous Education - Deliver rigorous programs that challenge and prepare students to transition through each level of the educational system.								
Percent of students scoring at grade level or higher on the statewide reading assessment	Spring 2016	Spring 2017	Spring 2018	Spring 2019	Spring 2020	Spring 2021	Spring 2022	
Kindergarten				63.1%	NA[10]	61.3%	64.8%	70%
1st Grade				66.7%	NA[10]	59.5%	63.8%	70%
2nd Grade				75.3%	NA[10]	69.2%	72.4%	80%
3rd Grade				73.2%	NA[10]	70.1%	71.7%	80%
Percent Growth Fall to Spring of student cohorts scoring at grade level or higher on the statewide reading assessment (broken out by grade level, K-3)	Fall 2015	Fall 2016	Fall 2017	Fall 2018	Fall 2019	Fall 2020	Fall 2021	
Kindergarten				44.9%	42.3%	43.4%	40.8%	70%
1st Grade				42.9%	48.9%	41.7%	46.0%	--
2nd Grade				60.3%	62.9%	54.3%	57.3%	--
3rd Grade				61.2%	64.0%	58.3%	59.3%	--
Growth								
Kindergarten				18.2%	NA[10]	17.9%	24.0%	55%
1st Grade				23.8%	NA[10]	17.8%	17.8%	55%
2nd Grade				15.0%	NA[10]	14.9%	15.1%	65%
3rd Grade				12.0%	NA[10]	11.8%	12.4%	65%

	FY2016	FY2017	FY2018	FY2019	FY2020	FY2021	FY2022	Benchmark
Percentage of students meeting proficient or advanced on the Idaho Standards Achievement Test[10]	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	
Math								
5th Grade		42.3%	43.8%	45.5%	NA[10]	39.8%		58.59%
8th Grade		39.5%	42.1%	41.6%	NA[10]	35.8%		57.59%
High School		33.2%	34.2%	34.7%	NA[10]	32.6%		53.30%
ELA								
5th Grade		54.2%	55.8%	57.3%	NA[10]	55.3%		68.04%
8th Grade		52.9%	54.7%	54.4%	NA[10]	55.5%		67.64%
High School		60.3%	60.6%	60.3%	NA[10]	60.1%		73.60%
Science								
5th Grade		66.5%	65.6%	64.8%	NA[10]	NA		FY22 Baseline
High School		65.2%	67.3%	62.8%	NA[10]	NA		FY22 Baseline
	2014-15 graduates	2015-16 graduates	2016-17 graduates	2017-18 graduates	2018-19 graduates	2019-20 graduates	2020-21 graduates	
High School Cohort Graduation Rate	78.9%	79.7%	79.7%	80.6%	80.7%	82.1%	80.1%	At least 95%
Percentage of Idaho high school graduates meeting college placement/entrance exam college readiness benchmarks	2016 graduates	2017 graduates	2018 graduates	2019 graduates	2020 graduates	2021 graduates	2022 graduates	
ACT	**36%**	**33%**	**34%**	**35%**	**37%**	**40%**	**39%**	**At least 60%**
English	77%	71%	72%	73%	74%	75%	75%	
Mathematics	54%	49%	49%	51%	52%	53%	55%	
Reading	59%	57%	57%	59%	61%	61%	60%	
Science	46%	44%	45%	47%	49%	51%	50%	
SAT		**34%**	**33%**	**32%**	**32%**	**32%**		**At least 60%**
Evidence-Based Reading and Writing (ERW)	Test changed	63%	60%	58%	57%	58%		
Mathematics		36%	35%	34%	34%	33%		
Percent of high school graduates who participated in one or more advanced opportunities[2]	2016 graduates	2017 graduates	2018 graduates	2019 graduates	2020 graduates	2021 graduates	2022 graduates	
Any Advanced Opportunities				81%	81%	76%	75%	At least 80%
Specific Advanced Opportunities								
Advanced Placement	39%	38%	39%	38%	40%	41%	39%	
International Baccalaureate	7%	3%	2%	1%	1%	1%	1%	
Dual Credit (Earned)[2]	42%	48%	54%	58%	60%	61%	60%	
Technical Competency Credit	54%	62%	59%	47%	45%	27%	27%	
Industry Certification			2%	3%	3%	4%	4%	
Percent of dual credit students who graduate high school with an Associate's Degree	1.15%	1.90%	1.43%	1.40%	1.70%	2.28%		At least 3%
	2016 graduates	2017 graduates	2018 graduates	2019 graduates	2020 graduates	2021 graduates		
Percent of high school graduates who enroll in a postsecondary institution								
Fall Immediately after high school graduation	49.3%	49.7%	47.6%	45.7%	38.9%	38.3%		
Within 12 months of high school graduation	53.0%	53.0%	52.0%	49.0%	42.3%			
Within 36 months of high school graduation	64.2%	63.0%	59.8%	57.4%				At least 60%

	FY2016	FY2017	FY2018	FY2019	FY2020	FY2021	FY2022	Benchmark
Objective B: School Readiness - Explore opportunities to enhance school readiness.								
	Fall 2015	Fall 2016	Fall 2017	Fall 2018	Fall 2019	Fall 2020	Fall 2021	
Percentage of students scoring at grade level on the statewide reading assessment during the Fall administration in Kindergarten.	NA	NA	NA	44.9%	42.3%	43.4%	40.8%	70.0%
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.								
Percent of Idahoans (ages 25-34) who have a college degree or certificate requiring one academic year or more of study[3]	42.4%	42.4%	41.8%	42.2%	43.8%	45.9%		At least 60%
Total number of certificates/degrees produced, by institution per year[1]	2015-16	2016-17	2017-18	2018-19	2019-20	2020-21	2021-22	
Certificates of at least one year	1,020	1,143	1,472	1,613	2,350	2,365	2,485	4371[6]/1262[7] (FY25)
College of Eastern Idaho	112	109	110	101	104	96	80	241
College of Southern Idaho	192	151	154	146	129	147	134	195
College of Western Idaho	229	240	402	508	1264	1158	1327	365
North Idaho College	259	431	556	604	620	639	568	117
Boise State University	0	0	0	0	0	0	0	NA
Idaho State University	206	194	231	242	219	300	357	319
Lewis-Clark State College	22	18	19	12	14	25	19	25
University of Idaho	0	0	0	0	0	0	0	NA
Associate degrees	3,640	3,538	3,584	3,460	3,617	3,696	3,891	4070[6]/4157[7] (FY25)
College of Eastern Idaho	118	121	93	146	166	227	276	517
College of Southern Idaho	919	816	800	839	947	947	1009	1067
College of Western Idaho	996	979	984	886	949	944	1037	981
North Idaho College	749	687	690	681	659	734	717	700
Boise State University	145	116	119	133	111	132	127	150
Idaho State University	362	405	473	428	420	494	521	467
Lewis-Clark State College	351	414	425	347	365	218	204	275
University of Idaho	0	0	0	0	0	0	0	NA
Baccalaureate degrees	6,702	6,746	6,796	7,033	7,101	7,443	7,309	11897[6]/7896[7]
Boise State University	3,174	3,317	3,373	3,472	3,680	3,929	4,078	4351
Idaho State University	1,228	1,168	1,166	1,233	1,155	1,284	1,073	1209
Lewis-Clark State College	541	528	587	626	505	599	579	534
University of Idaho	1,759	1,733	1,670	1,702	1,761	1,631	1,579	1802

	FY2016	FY2017	FY2018	FY2019	FY2020	FY2021	FY2022	Benchmark
Masters degrees	1,609	1,667	1,860	1,781	1,968	1,990	2,149	2146
Boise State University	670	776	917	861	954	1,074	1,062	
Idaho State University	421	382	456	430	464	452	556	
Lewis-Clark State College	0	0	0	0	0	0	0	
University of Idaho	518	509	487	490	550	464	531	
Doctoral degrees	398	361	362	372	379	468	518	1069
Boise State University	18	36	32	45	53	50	58	
Idaho State University	175	160	154	167	163	193	196	
Lewis-Clark State College	0	0	0	0	0	0	0	
University of Idaho	205	165	176	160	163	225	264	
Percentage of new full-time degree seeking students who return (or who graduate) for second year in an Idaho postsecondary institution[1]	Fall 2015 cohort	Fall 2016 cohort	Fall 2017 cohort	Fall 2018 cohort	Fall 2019 cohort	Fall 2020 cohort	Fall 2020 cohort	
Two-year institution								
New student	52%	56%	57%	55%	59%	61%	58%	At least 75%
Transfer	58%	61%	66%	59%	67%	64%	57%	At least 75%
Four-year institution								
New student	74%	74%	74%	74%	74%	72%	74%	At least 85%
Transfer	72%	76%	78%	75%	77%	74%	74%	At least 85%
Percent of full-time, first-time freshman graduating within 150% of time or less[1]								
	2013-14 cohort	2014-15 cohort	2015-16 cohort	2016-17 cohort	2017-18 cohort	2018-19 cohort	2019-20 cohort	
Two-year institution	20%	22%	25%	26%	30%	30%	32%	At least 50%
	2010-11 cohort	2011-12 cohort	2012-13 cohort	2013-14 cohort	2014-15 cohort	2015-16 cohort	2016-17 cohort	
Four-year institution	41%	42%	46%	48%	49%	50%	53%	At least 50%
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).								
Percent of undergraduate, degree-seeking students completing 30 or more credits per academic year at the institution reporting[1]	21%	21%	22%	24%	23%	22%	23%	50% or more
Two-year institution	8%	7%	8%	9%	7%	7%	8%	
Four-year institution	26%	28%	28%	30%	31%	30%	30%	
Percent of new degree-seeking freshmen completing a gateway math course within two years[1]	2013-14 cohort	2014-15 cohort	2015-16 cohort	2016-17 cohort	2017-18 cohort	2018-19 cohort	2019-20 cohort	
	45%	50%	53%	60%	62%	65%	64%	60% or more
Median number of credits earned at completion of Associate's or Baccalaureate degree program[1]								
Transfer students								
Associate - Two Year Institution	83	77	76	83	79	88	90	69
Associate - Four Year Institution	129	131	127	116	118	96	90	
Baccalaureate	145	145	145	145	143	143	140	138
Non-transfer students								
Associate - Two Year Institution	78	73	72	72	70	70	68	69
Associate - Four Year Institution	112	106	106	106	101	81	75	
Baccalaureate	137	137	136	136	133	135	133	138

	FY2016	FY2017	FY2018	FY2019	FY2020	FY2021	FY2022	Benchmark
Objective C: Access - Increase access to Idaho's robust educational system for all Idahoans, regardless of socioeconomic status, age, or geographic locations.								
Annual number of state-funded scholarships awarded and total dollar amount	FY2016	FY2017	FY2018	FY2019	FY2020	FY2021	FY2022	
Total Scholarships Awarded	1,774	3,487	3,795	4,403	4,988	6,356	6,302	At least 3,000
Armed Forces and Public Safety Officer Scholarship	10	10	11	13	12	9	13	
Opportunity Scholarship	1,764	3,461	3,739	4,254	4,767	6,144	6,147	
Opportunity Scholarship for Adult Learners	0	0	0	57	126	118	89	
Postsecondary Credit Scholarship	0	16	45	79	83	85	53	
Total Dollar Amount of Scholarships Awarded	$5,300,248	$10,074,212	$11,822,718	$14,641,323	$21,231,039	$20,366,595	$20,373,737	At least $16 M
Armed Forces and Public Safety Officer Scholarship	$176,000	$152,038	$174,497	$185,627	$156,966	$98,915	$175,784	
Opportunity Scholarship	$5,124,248	$9,901,424	$11,585,371	$14,237,582	$20,610,953	$19,829,119	$19,900,569	
Opportunity Scholarship for Adult Learners	$0	$0	$0	$104,564	$348,670	$329,082	$224,434	
Postsecondary Credit Scholarship	$0	$20,750	$62,850	$113,550	$114,450	$109,479	$72,950	
Proportion of postsecondary graduates with student loan debt	2015-16 graduates 50%	2016-17 graduates 45%	2017-18 graduates 45%	2018-19 graduates 44%	2019-20 graduates 41%	2020-21 graduates 40%	2021-22 graduates 38%	
Two-year institution	49%	41%	42%	40%	38%	35%	36%	
Four-year institution	50%	46%	46%	46%	43%	42%	39%	Less than 50%
Percent of students who complete the Free Application for Federal Student Aid (FAFSA) - *Limited to graduating class cohort*	NA	2016-17 graduates 60%	2017-18 graduates 61%	2018-19 graduates 52%	2019-20 graduates 51%	2020-21 graduates 46%	2021-22 graduates 44%	60% or more
Percent cost of attendance (to the student)[3]								
In-State *First Time, Full Time Degree Seeking Undergraduate living on campus (In-District for Two-Year)*	FY2015	FY2016	FY2017	FY2018	FY2019	FY2020	FY2021	
Two-year institution								
Students living off campus (*w family*)	88%	92%	94%	97%	92%	93%	93%	Less than 96%
Four-year institution								
Students living on campus	96%	91%	88%	90%	88%	91%	91%	Less than 96%
Students living off campus (*w family*)	102%	98%	88%	88%	89%	90%	91%	Less than 96%
Average net cost to attend public institution.[3]								
First Time, Full Time Degree Seeking Undergraduate awarded grant or scholarhip	FY2015	FY2016	FY2017	FY2018	FY2019	FY2020	FY2021	
Four-year institution	101.1%	94.4%	98.1%	94.6%	93.1%	92.6%		90% of peers
Expense per student FTE[3]	FY2015	FY2016	FY2017	FY2018	FY2019	FY2020	FY2021	
IPEDS Total expenses and deductions / 12 Month FTE (Undergrad, Grad & PhD)	$22,140	$23,758	$24,516	$25,111	$25,415	$25,538	$25,772	Less than $20,000
Two-year institution	$13,883	$15,168	$15,432	$15,196	$15,339	$15,597	$14,255	
Four-year institution	$25,118	$26,691	$27,706	$28,766	$29,168	$29,334	$29,921	

	FY2016	FY2017	FY2018	FY2019	FY2020	FY2021	FY2022	Benchmark
Number of degrees produced (Undergraduate)[1]	13,008	13,111	13,569	13,732	14,235	14,816	15,317	At least 15,000
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.								
Percentage of students participating in internships	5%	5%	6%	6%	6%	6%	5%	10% or more
Percentage of undergraduate students participating in undergraduate research.[1]								
BSU	35%	37%	37%	43%	43%	34%	36%	Greater than 40%
ISU	43%	42%	41%	38%	36%	37%	37%	Greater than 50%
UI	64%	65%	61%	58%	60%	56%	53%	Greater than 60%
LCSC	10%	14%	16%	20%	12%	11%	4%	
Ratio of non-STEM to STEM baccalaureate degrees conferred in STEM fields[1]	20.6%	21.7%	22.0%	21.7%	21.9%	19.9%	19.5%	25% or more
Increase in postsecondary programs tied to workforce needs	23	20	20	22	45	46	50	**10**
Objective B: Medical Education - Deliver relevant education that meets the health care needs of Idaho and the region.								
Number of University of Utah Medical School or WWAMI graduates who are residents in one of Idaho's graduate medical education programs.[5]	NA	4	8	11	11	21	20	**8**
Idaho graduates who participated in one of the state sponsored medical programs who returned to Idaho	NA	WWAMI - 50%	WWAMI-51%	WWAMI-51%	WWAMI-51%	WWAMI-50%	WWAMI-51%	At least 60%
Percentage of Family Medicine Residency graduates practicing in Idaho								
Boise	47%	56%	53%	73%	63%	38%	61%	**At least 60%**
ISU	43%	71%	29%	43%	43%	71%	71%	**At least 60%**
CDA	NA	50%	83%	72%	67%	71%	NA	At least 60%
Percentage of Psychiatry Residency Program graduates practicing in Idaho.	NA	NA	NA	NA	NA	NA	NA	At least 50%
Medical related postsecondary programs (other than nursing)	78	82	89	100	107	112	124	**100**

Notes:

[1] FY20 performance measures for the postsecondary institutions are preliminary.

[2] SDE report card data except Dual Credit has been modified to only include students with earned course credits

[3] This metric is contingent on the IPEDS data release.

[4] The Public Use Microdata Sample of the American Community Survey is published In November ea year.

[5] An expansion in the number of graduate medical programs in the state resulted in increased gradutes in FY21

[6] Targets based on projected work force need

[7] Institution recommended target based on current awards and projected growth in student enrollment, retention, and completion

[10] Spring IRI tests results not tabulated, ISAT not administered due to COVID closures

Key: Not Met | Not Met Diverging | Far Converging | Near Diverging | Near Converging | Met

SYSTEMWIDE POSTSECONDARY PERFORMANCE MEASURES

	FY16	FY17	FY18	FY19	FY20	FY21	FY22
Number of degrees produced	**14,269**	**14,551**	**15,356**	**15,620**	**16,838**	**17,410**	**18,030**
Four-year institution	**10,238**	**10,542**	**10,974**	**11,132**	**11,395**	**11,975**	**12,263**
[1] Certificates of less than 1 academic year	**161**	**268**	**331**	**457**	**520**	**637**	**794**
BSU	127	200	248	360	411	515	628
ISU	1	19	26	29	6	4	5
LCSC			2	3	12	26	43
UI	33	49	55	65	91	92	118
[2] Certificates of 1 academic year or more	**228**	**212**	**250**	**254**	**233**	**325**	**376**
BSU							
ISU	206	194	231	242	219	300	357
LCSC	22	18	19	12	14	25	19
UI							
[3] Associate's degree	**858**	**935**	**1,017**	**908**	**896**	**844**	**852**
BSU	145	116	119	133	111	132	127
ISU	362	405	473	428	420	494	521
LCSC	351	414	425	347	365	218	204
UI							
[5] Bachelor's degree	**6,702**	**6,746**	**6,796**	**7,033**	**7,101**	**7,443**	**7,309**
BSU	3,174	3,317	3,373	3,472	3,680	3,929	4,078
ISU	1,228	1,168	1,166	1,233	1,155	1,284	1,073
LCSC	541	528	587	626	505	599	579
UI	1,759	1,733	1,670	1,702	1,761	1,631	1,579
[6] Certificate – Graduate	**241**	**297**	**315**	**275**	**253**	**229**	**228**
BSU	178	220	248	221	189	170	185
ISU	7	21	31	14	27	23	17
LCSC							2
UI	56	56	36	40	37	36	24
[7] Master's Degree	**1,609**	**1,667**	**1,860**	**1,781**	**1,968**	**1,990**	**2,149**
BSU	670	776	917	861	954	1,074	1,062
ISU	421	382	456	430	464	452	556
LCSC							
UI	518	509	487	490	550	464	531
[8] Education Specialist Degree	**41**	**56**	**43**	**52**	**45**	**39**	**37**
BSU	10	15	16	19	24	23	16
ISU	10	7	3	11	8	6	12
LCSC							
UI	21	34	24	22	13	10	9
Doctoral Degree	**398**	**361**	**362**	**372**	**379**	**468**	**518**
BSU	18	36	32	45	53	50	58
ISU	175	160	154	167	163	193	196
LCSC							
UI	205	165	176	160	163	225	264
Two-year Institution	**4,031**	**4,009**	**4,382**	**4,488**	**5,443**	**5,435**	**5,767**
[1] Certificates of less than 1 academic year	**457**	**475**	**593**	**577**	**605**	**542**	**616**
CEI	8		10	8	8	23	26
CSI	56	86	149	134	164	156	280
CWI	319	315	336	361	312	267	228
NIC	74	74	98	74	121	96	82
[2] Certificates of 1 academic year or more	**792**	**931**	**1,222**	**1,359**	**2,117**	**2,040**	**2,109**
CEI	112	109	110	101	104	96	80
CSI	192	151	154	146	129	147	134
CWI	229	240	402	508	1,264	1,158	1,327
NIC	259	431	556	604	620	639	568
[3] Associate's degree	**2,782**	**2,603**	**2,567**	**2,552**	**2,721**	**2,852**	**3,039**
CEI	118	121	93	146	166	227	276
CSI	919	816	800	839	947	947	1,009
CWI	996	979	984	886	949	944	1,037
NIC	749	687	690	681	659	734	717
[5] Bachelor's degree						**1**	**3**
CSI						1	3
Number of Graduates, Distinct per Attainment Level	**13,732**	**13,788**	**14,623**	**14,967**	**16,174**	**16,739**	**17,406**
Four-year institution	**9,923**	**10,008**	**10,608**	**10,780**	**11,048**	**11,613**	**11,928**
[1] Certificates of less than 1 academic year	**160**	**267**	**323**	**455**	**513**	**624**	**779**
BSU	127	200	248	360	411	515	628
ISU	1	19	21	28	6	4	5
LCSC			2	3	12	23	35
UI	32	48	52	64	84	82	111
[2] Certificates of 1 academic year or more	**224**	**203**	**245**	**253**	**231**	**307**	**354**
BSU							

ISU	202	189	227	238	218	288	335
LCSC	22	14	18	15	13	19	19
UI							
[3] Associate's degree	**844**	**816**	**1,000**	**883**	**877**	**827**	**828**
BSU	141	114	118	131	109	132	127
ISU	358	402	472	427	411	489	509
LCSC	345	300	410	325	357	206	192
UI							
[5] Bachelor's degree	**6,410**	**6,459**	**6,470**	**6,718**	**6,795**	**7,138**	**7,055**
BSU	2,998	3,141	3,196	3,289	3,525	3,754	3,946
ISU	1,196	1,139	1,131	1,174	1,104	1,227	1,031
LCSC	529	528	573	616	491	589	571
UI	1,687	1,651	1,570	1,639	1,675	1,568	1,507
[6] Certificate – Graduate	**237**	**288**	**308**	**269**	**248**	**225**	**217**
BSU	173	212	241	219	184	166	174
ISU	8	21	31	14	27	23	17
LCSC							2
UI	56	55	36	36	37	36	24
[7] Master's Degree	**1,600**	**1,558**	**1,857**	**1,778**	**1,960**	**1,982**	**2,140**
BSU	670	670	917	862	954	1,075	1,062
ISU	414	380	453	426	456	445	548
LCSC							
UI	516	508	487	490	550	462	530
[8] Education Specialist Degree	**40**	**56**	**43**	**52**	**45**	**39**	**37**
BSU	10	15	16	19	24	23	16
ISU	9	7	3	11	8	6	12
LCSC							
UI	21	34	24	22	13	10	9
Doctoral Degree	**408**	**361**	**362**	**372**	**379**	**471**	**518**
BSU	28	36	32	45	53	53	58
ISU	175	160	154	167	163	193	196
LCSC							
UI	205	165	176	160	163	225	264
Two-year Institution	**3,809**	**3,780**	**4,015**	**4,187**	**5,126**	**5,126**	**5,478**
[1] Certificates of less than 1 academic year	**410**	**398**	**503**	**459**	**531**	**482**	**571**
CEI	8		10	8	8	21	26
CSI	49	82	142	133	162	154	272
CWI	285	259	274	253	256	222	206
NIC	68	57	77	65	105	85	67
[2] Certificates of 1 academic year or more	**786**	**919**	**1,133**	**1,281**	**2,034**	**1,958**	**2,024**
CEI	112	109	110	101	104	96	80
CSI	189	148	152	146	129	147	134
CWI	226	240	337	451	1,197	1,086	1,260
NIC	259	422	534	583	604	629	550
[3] Associate's degree	**2,613**	**2,463**	**2,379**	**2,447**	**2,561**	**2,685**	**2,880**
CEI	117	121	93	141	164	220	263
CSI	853	774	736	795	861	876	943
CWI	910	893	891	861	917	913	1,009
NIC	733	675	659	650	619	676	665
[5] Bachelor's degree						**1**	**3**
CSI						1	3
Percent of first-time, full-time freshman graduating within 100% of time	**20.37%**	**23.33%**	**24.76%**	**27.44%**	**31.63%**	**33.64%**	**33.29%**
Four-year institution	**22.51%**	**25.88%**	**27.49%**	**29.94%**	**35.05%**	**37.03%**	**36.14%**
Bachelor's or equivalent seeking subcohort (Comp	**23.09%**	**25.97%**	**27.00%**	**29.69%**	**33.68%**	**35.79%**	**34.58%**
BSU	21.07%	25.58%	28.71%	30.63%	38.15%	39.68%	39.33%
ISU	14.01%	15.97%	16.31%	19.59%	19.28%	23.81%	19.19%
LCSC	16.84%	16.39%	15.14%	21.07%	18.14%	24.21%	21.43%
UI	34.11%	35.41%	37.13%	38.17%	40.63%	41.13%	41.04%
Degree/certificate-seeking cohort (Completers wi	**21.13%**	**25.67%**	**28.73%**	**30.56%**	**38.14%**	**39.68%**	**39.31%**
BSU	21.13%	25.67%	28.73%	30.56%	38.14%	39.68%	39.31%
Two-year Institution	**12.07%**	**14.29%**	**15.28%**	**19.03%**	**18.62%**	**22.06%**	**22.67%**
Degree/certificate-seeking cohort (Completers wi	**12.07%**	**14.29%**	**15.28%**	**19.03%**	**18.62%**	**22.06%**	**22.67%**
CEI	37.78%	46.27%	58.33%	48.51%	31.67%	40.80%	28.19%
CSI	13.10%	14.52%	15.42%	20.33%	21.66%	30.72%	30.90%
CWI	5.81%	9.03%	10.55%	12.17%	14.17%	15.70%	14.48%
NIC	14.85%	16.80%	16.40%	20.21%	18.66%	17.39%	23.23%
Percent of full-time first-time freshman graduating within 150% of time or less (2yr and 4yr).	**34.70%**	**36.72%**	**39.97%**	**41.12%**	**43.14%**	**44.01%**	**46.42%**
Four-year institution	**41.15%**	**42.23%**	**45.91%**	**47.67%**	**48.66%**	**49.75%**	**52.51%**
Bachelor's or equivalent seeking subcohort	**41.15%**	**42.23%**	**45.91%**	**47.67%**	**48.66%**	**49.75%**	**52.51%**

BSU	38.66%	43.42%	45.77%	50.30%	53.75%	53.00%	58.81%
ISU	27.67%	28.85%	31.77%	34.49%	32.65%	36.10%	34.01%
LCSC	29.87%	28.17%	34.49%	35.25%	34.13%	35.79%	29.41%
UI	56.11%	54.86%	59.30%	55.97%	59.40%	59.06%	60.78%
Two-year Institution	**20.23%**	**21.60%**	**25.05%**	**26.06%**	**29.64%**	**29.96%**	**32.40%**
Degree/certificate-seeking cohort	**20.23%**	**21.60%**	**25.05%**	**26.06%**	**29.64%**	**29.96%**	**32.40%**
CEI	53.85%	53.33%	53.73%	58.33%	55.97%	46.15%	46.55%
CSI	21.47%	26.49%	26.73%	30.68%	35.21%	35.53%	43.87%
CWI	12.91%	11.82%	20.02%	20.26%	22.71%	24.67%	26.51%
NIC	24.60%	23.12%	27.04%	25.48%	28.14%	28.28%	25.31%
Percent of new degree-seeking freshmen completing a gateway math course within two years.	**45.30%**	**49.61%**	**53.29%**	**60.38%**	**62.42%**	**65.19%**	**64.40%**
Four-year institution	**67.48%**	**69.38%**	**72.28%**	**80.99%**	**80.24%**	**81.23%**	**83.38%**
Math	**67.48%**	**69.38%**	**72.28%**	**80.99%**	**80.24%**	**81.23%**	**83.38%**
BSU	75.05%	77.14%	79.83%	86.59%	86.79%	85.93%	85.68%
ISU	68.64%	66.45%	65.97%	68.45%	67.73%	70.62%	73.24%
LCSC	49.61%	48.24%	52.08%	48.63%	36.48%	44.42%	52.43%
UI	63.13%	69.70%	70.79%	88.83%	89.81%	93.30%	91.72%
Two-year Institution	**23.59%**	**25.59%**	**27.74%**	**33.61%**	**38.28%**	**41.34%**	**39.94%**
Math	**23.59%**	**25.59%**	**27.74%**	**33.61%**	**38.28%**	**41.34%**	**39.94%**
CEI	30.43%	29.32%	43.30%	39.02%	52.78%	60.80%	52.63%
CSI	27.92%	29.42%	33.91%	40.86%	47.80%	50.19%	50.46%
CWI	15.90%	17.31%	18.37%	24.42%	26.83%	31.30%	29.52%
NIC	48.48%	50.09%	53.73%	53.22%	59.38%	52.50%	52.29%
Percent of undergraduate, degree-seeking students completing 30 or more credits per academic year at the institution reporting.	**21.22%**	**21.33%**	**22.05%**	**23.90%**	**23.34%**	**22.48%**	**23.01%**
Four-year institution	**26.18%**	**27.52%**	**28.48%**	**30.12%**	**31.32%**	**30.31%**	**29.55%**
None	**26.18%**	**27.52%**	**28.48%**	**30.12%**	**31.32%**	**30.31%**	**29.55%**
BSU	23.94%	23.94%	23.86%	26.50%	28.68%	28.30%	27.88%
ISU	20.30%	24.32%	23.90%	23.77%	25.80%	23.69%	25.26%
LCSC	22.99%	25.03%	38.02%	30.58%	32.53%	28.66%	26.25%
UI	36.49%	37.67%	37.18%	43.69%	41.97%	41.84%	38.55%
Two-year Institution	**8.40%**	**7.40%**	**7.84%**	**8.75%**	**7.46%**	**7.17%**	**8.09%**
None	**8.40%**	**7.40%**	**7.84%**	**8.75%**	**7.46%**	**7.17%**	**8.09%**
CEI	13.24%	12.10%	7.99%	8.12%	5.89%	3.62%	9.80%
CSI	10.61%	10.67%	13.17%	13.99%	14.90%	12.70%	13.02%
CWI	3.75%	3.09%	3.89%	4.78%	4.05%	4.11%	3.48%
NIC	9.74%	9.94%	10.28%	10.54%	9.86%	10.20%	10.24%
Percent of undergraduate, degree-seeking students taking a remediation course completing a subsequent credit bearing course (in the area identified as needing remediation) within a year with a "C" or higher.	**38.82%**	**44.00%**	**44.73%**	**45.61%**	**47.00%**	**46.63%**	**48.29%**
Four-year institution	**49.45%**	**51.68%**	**52.80%**	**53.02%**	**54.06%**	**53.99%**	**56.87%**
English	**66.64%**	**68.89%**	**73.76%**	**74.98%**	**73.12%**	**69.38%**	**69.57%**
BSU	83.22%	83.03%	87.46%	87.27%	87.13%	84.83%	78.93%
ISU	62.29%	77.19%	72.95%	74.07%	68.28%	59.66%	63.92%
LCSC	52.17%	43.01%	63.18%	71.98%	67.77%	60.52%	62.45%
UI	72.18%	69.64%	70.09%	63.25%	74.24%	68.95%	71.01%
Math	**43.34%**	**46.16%**	**45.48%**	**43.51%**	**44.37%**	**48.37%**	**50.51%**
BSU	55.11%	58.41%	57.42%	55.80%	56.69%	59.64%	65.08%
ISU	25.67%	28.76%	20.28%	23.04%	22.08%	28.53%	38.39%
LCSC	41.31%	39.95%	47.48%	44.35%	44.02%	45.22%	43.56%
UI	51.54%	47.31%	52.88%	52.83%	57.28%	52.36%	56.60%
Two-year Institution	**28.71%**	**36.71%**	**36.70%**	**38.84%**	**40.04%**	**40.43%**	**41.61%**
English	**60.39%**	**63.13%**	**56.89%**	**60.50%**	**63.30%**	**59.43%**	**56.74%**
CEI	80.95%	69.23%	85.71%	78.13%	75.95%	74.29%	70.00%
CSI	70.77%	79.49%	71.74%	77.78%	72.55%	70.56%	68.45%
CWI	70.18%	70.47%	66.96%	73.32%	73.65%	69.58%	64.20%
NIC	22.89%	30.92%	30.51%	22.73%	29.92%	21.07%	24.00%
Math	**17.80%**	**25.85%**	**30.35%**	**31.14%**	**32.35%**	**34.32%**	**36.86%**
CEI	42.22%	50.00%	39.04%	39.66%	45.69%	48.65%	64.50%
CSI	31.66%	41.30%	47.95%	47.59%	43.18%	47.83%	50.59%
CWI	9.77%	16.83%	22.00%	23.08%	26.73%	25.24%	25.04%
NIC	17.41%	22.77%	27.96%	27.33%	27.46%	30.87%	30.57%
Percent of dual credit students who graduate high school with an Associate's Degree	**0.84%**	**1.90%**	**1.43%**	**1.40%**	**1.70%**	**2.28%**	

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.")

ATTACHMENT 6

Master Planning Calendar (Updated August 2019)

Month	Strategic Planning	Performance Reporting	Budgeting	Administrative Rules/Legislation	Communications
Jan	Agencies and Institutions start updating their strategic plan based on SBOE guidance and strategic plan.	The SBOE reviews NWCCU accreditation results as available.	Board presents budget to the legislature	Rules and legislation are presented to the legislature	SBOE presentations to JFAC OSBE distributes annual Fact Book to legislators OSBE Financial Aid/FAFSA Awareness
Feb	Board approves K-20 Education Strategic Plan Agencies and institutions submit their strategic plans to the PPGA Committee for review and discussion prior to April Board meeting submittal.		Line item categories are developed and reviewed by the Presidents' Council and the BAHR Committee		OSBE presentation to germane committees
Mar	Agencies and Institutions finalize their strategic plan updates for submission to the SBOE prior to **April** agenda cutoff.	Institutions and agencies revise performance measures and benchmarks to align with strategic plan. **Early-April** agencies and institutions submit proposed performance measures/benchmarks (including continued use of current measures, if appropriate) for review/approval by OSBE. (Note: These measures are for the fiscal year beginning July 1 of the previous year)			
Apr	SBOE reviews and approves updated institution and agency strategic plans OSBE/SBOE receives final DFM strategic plan guidance	SBOE/OSBE receives final DFM performance reporting guidance (for agencies and institutions). SBOE reviews and approves agency and institution proposed performance measures and benchmarks through strategic plan approval.	SBOE is briefed on next FY legislative appropriations as it impacts education agencies and institutions. SBOE approves line item categories for the institutions.	SBOE is briefed on new legislation as it impacts education agencies and institutions. OSBE meets with institution government affairs directors regarding impact of legislation and off-session legislative strategy	
May	SBOE Conducts SBOE Governed institutions Presidents evaluations SBOE reviews self-assessment and makes recommendations for improvements. Executive Director Conducts Agency Heads evaluations.			Agencies and institutions submit legislative ideas for PPGA Committee review and recommendation to Executive Director.	

ATTACHMENT 6

Month	Strategic Planning	Performance Reporting	Budgeting	Administrative Rules/Legislation	Communications
Jun			OSBE provides MCO budget guidelines and templates to the agencies and institutions for submission (prior to **August** Board agenda deadline). BAHR provides guidance on submitted line items to institutions and agencies prior to submittal of line items for SBOE action in August.	PPGA reviews and provides guidance to Executive Director on proposed agency and institution legislative ideas. OSBE/Executive Director submits legislative ideas to DFM prior to the required **July 12** deadline.	SBOE staff meets with legislators in Eastern Idaho (Idaho Falls)
Jul	OSBE submits SBOE approved agency and institution strategic plans (revised if required by the Board) to DFM by the **July 1** deadline.		Agencies and institutions submit estimated MCO budget to OSBE prior to **August** Board agenda deadline.	New legislation from prior session takes effect July 1. Department of Administration publishes proposed rules and 21 day review period is commenced. Governor's Office and DFM review legislative ideas. OSBE begins development of approved legislative ideas into draft legislation (as appropriate) for consideration at August Board meeting. Legislative language submitted by **August** agenda cutoff.	
Aug		Agencies and institutions submit agency and institution performance reports to OSBE in **early-August**. Performance Measure reports include Board required system wide performance measures and performance measures approved from the strategic plans. OSBE submits agency and institution performance reports to DFM by the required **August 30** deadline.	-SBOE reviews and approves final budget request for next FY. -Draft budget request input to DFM automated system (by agencies and institutions) with a copy of supporting materials sent to OSBE. -OSBE reviews agency and institution budget submissions to ensure compliance with SBOE guidance. In **late-August** all budget documents returned to OSBE for final submission to DFM and LSO. DFM Deadline for submittal August 30	Board approves any proposed administrative rules. August 30 last day to submit proposed legislative ideas for next session to DFM/Admin Rules Proposed legislation is approved by SBOE. Proposed (final draft) legislation is due to DFM **August 16**.	SBOE staff meets with legislators in Southern Idaho (Twin Falls) and Eastern Idaho (Pocatello) OSBE begins planning for annual Fact Book

ATTACHMENT 6

Month	Strategic Planning	Performance Reporting	Budgeting	Administrative Rules/Legislation	Communications
Sep	SBOE conducts self-assessment.		Final budget requests forwarded to DFM and LSO by **September 1st** deadline.	Department of Administration publishes proposed rules and 21 day review period is commenced.	OSBE planning for College Application Week
Oct		SBOE reviews performance data from institutions and agencies for the previous year. Review forms the basis for revising strategic plan.	Authorized budget request revisions due to DFM October 30	DFM forwards legislation to LSO by **mid-October**. Board approves Pending Rules, modifications are made based on public comment.	SBOE staff meets with legislators in North Idaho (Lewiston/Moscow)
Nov	Staff develops and finalizes the annual update to the strategic plan.	OSBE updates performance measures to align with the Board's strategic plan.		-Proposed legislation in bill format returned by LSO to OSBE for review and final changes. -Pending rules not approved in October are approved. (Special Board Meeting). Pending rules are submitted to the legislature for consideration. Temporary rules take effect when approved by the Board. Pending rules take effect at the end of the legislative session. November 29 final date for submitting pending rules to DFM/Admin rules for consideration during next session.	OSBE annual College Application Week
Dec				**Early-December** is the final date for changes to bills (legislative proposals). Bills with substantive changes are resubmitted to SBOE for final approval at special Board meeting if needed..	SBOE staff meets with legislators in North Idaho (Coeur d'Alene) OSBE finalizes annual Fact Book OSBE coordinates with institutions on JFAC presentations

Annual Performance Report Presentations

Month/Year	Institution/ Location	Agency
February 2020	BSU	ISDB /IPCSC/
April 2020	UI	HERC/IDLA
August 2020	ISU	ICTE/ IDPTV
October 2020	LCSC	IDVR/EPSCoR

STATE DEPARTMENT OF EDUCATION
DECEMBER 21, 2022

TAB	DESCRIPTION	ACTION
1	**K-12 DEVELOPMENTS**	Information Item
2	**IDAHO READING INDICATOR – FALL RESULTS**	Information Item
3	**2022 NAEP RESULTS**	Information Item
4	**ASSESSMENT REVIEW COMMITTEE RECOMMENDATIONS**	Action Item

SUBJECT

Developments in K-12 Education

BACKGROUND/DISCUSSION

Sherri Ybarra, Superintendent of Public Instruction, will share developments in K-12 Education with the Board, including:

- COVID relief funding update
- Teacher recognition
- Student Advisory Council

BOARD ACTION

This item is for informational purposes only.

SUBJECT

Fall 2022 IRI Results

REFERENCE

August 2016	Board members adopted the recommendations from the Early Literacy Assessment Working Group to replace the current statewide Idaho reading assessment with an electronically-administered, computer adaptive assessment.
December 2018	Board reviewed fall IRI performance on the new assessment.
October 2019	Board reviewed the statewide reading assessment results and discussed literacy growth targets.
October 2020	Board reviewed the statewide reading assessment results as part of the October Work Session
October 2021	Board reviewed the statewide reading assessment results, including the fall 2021 administration as part of the Work Session discussion.
December 2021	Board received an update on the fall 2021 statewide reading assessment, the Idaho Reading Indicator, results.
October 2022	Board received an update on the statewide reading assessment and cohort growth numbers as part of the Work Session's performance measure discussion.

APPLICABLE STATUTE, RULE, OR POLICY

Chapter 18, Title 33,
Administrative Code, IDAPA 08.02.03.111 Assessment in Public Schools

BACKGROUND/DISCUSSION

In previous years, the Board has been presented with fall statewide reading assessment (Idaho Reading Indicator) data. The results from this fall are of particular interest given the state's focus on early literacy and the potential effects of unfinished learning associated with COVID-19.

This fall's Idaho Reading Indicator (IRI) administration occurred between August 1, 2022 and September 30, 2022. By default, students participated in person, but the state again enabled a remote administration option to provide additional flexibility for schools and students. The State Department of Education (Department) matches the IRI results to the October public school enrollment data to create a final

dataset. At the time of the Board material submission deadline, the Department was working on the data cleanup process. The Department will finalize the data and provide a presentation to update the Board on current early reading performance at the December Board meeting.

IMPACT

This agenda item will provide the Board and Board staff with updated IRI performance data to inform ongoing discussions about early reading.

BOARD STAFF COMMENTS AND RECOMMENDATIONS

Pursuant to Section 33-1805, Idaho Code, each school district is required to report to the State Department of Education (Department) by October 1 the number and percentage of students, by grade level, on an individualized reading improvement plan. The Department is then required to compile the information and report it annually to the State Board of Education, the public, the Governor, and the Legislature. Additionally, pursuant to Section 33-1806, Idaho Code, the Department is required to report to the public, the State Board of Education, the Legislature and the Governor, the Fall and Spring statewide reading assessment results by school and by school district.

The Board has historically reviewed the statewide reading assessment performance at the October Board meeting as part of the annual Work Session discussion. In 2019, this review took place as a standalone item at the October Board meeting. Pursuant to Section 33-1809, Idaho Code, the Board is required to set statewide literacy growth targets. These targets are currently set by the Board through the K-20 Education Strategic Plan.

BOARD ACTION

This item is for informational purposes only.

SUBJECT

National Assessment of Educational Progress (NAEP) 2022 Reading and Mathematics Results

REFERENCE

June 2018	Board reviewed NAEP 2017 Mathematics and Reading results.

APPLICABLE STATUTE, RULE, OR POLICY

Education Sciences Reform Act of 2002, Pub. L. No. 107-279
Idaho Administrative Code, IDAPA 08.02.03 – Section 111, Assessment in the Public Schools

BACKGROUND/DISCUSSION

The National Assessment of Educational Progress results have been released as 'The Nation's Report Card.' These results show what students know and can do in reading and mathematics in 4th and 8th grade for the Nation and for Idaho.

IMPACT

The Nation's Report Card results are the first National K-12 results since the 2019 release before the COVID-19 pandemic. These results describe some of the effects on learning for National public schools and for Idaho.

ATTACHMENTS

Attachment 1 – NAEP Update - Presentation

BOARD STAFF COMMENTS AND RECOMMENDATIONS

The National Assessment of Educational Progress (NAEP), was established by Congress in 1969. Results are available going back to 1971 through the National Center for Education Statistics (NCES). The full results may be viewed through the NCES website at http://nces.ed.gov/nationsreportcard.

NAEP was designed as a common measure of student achievement that is conducted nationally. The assessment measures level of proficiency in mathematics, reading, science and other subjects. The results of NAEP are reported through the Nation's Report Card and NCES. NAEP is overseen and administered by NCES within the U.S. Department of Education and the Institute of Education Sciences. NAEP policy is set by The National Assessment Governing Board, an independent body appointed by the U.S. Secretary of Education.

While statewide assessments are designed to measure student achievement based on each state's individual content standards, the NAEP assessment measures student achievement against a common measure across states. The assessment is given to a sampling of students in grades 4, 8, and 12. Subjects include civics, economics, geography, mathematics, music and visual arts, reading, science, technology and engineering literacy, U.S. history, and writing.

Major assessment areas for NAEP include reading, writing, mathematics, and science, which are assessed at the national, state, and district levels. At grades 4 and 8, mathematics and reading are assessed every two years; at grade 12, they are assessed every four years. Science and writing are assessed every four years in grades 4 and 8. Other subject areas (e.g., civics, U.S. history, geography, economics, technology and engineering literacy, and the arts) are assessed only at the national level, occur less frequently and usually do not include all three grades. Results are reported as scores and as percentages of students reaching NAEP achievement levels—NAEP Basic, NAEP Proficient, and NAEP Advanced.

NAEP student achievement levels are performance standards that describe what students should know and be able to do at the applicable grade level. Results are reported as percentages of students performing at or above the three NAEP achievement levels. Students performing at or above the Proficient level on NAEP assessments demonstrate solid academic performance and competency over challenging subject matter. It should be noted that the NAEP Proficient achievement level does not represent grade level proficiency as determined by individual state assessment standards. NAEP achievement levels are set by the National Assessment Governing Board based on the recommendations from a representative panel of teachers, education specialists, and members of the general public. The authorizing legislation requires the NAEP achievement levels be used on a trial basis until the Commissioner of the National Center for Education Statistics (NCES) determines that the achievement levels are reasonable, valid, and informative to the public (20 U.S.C. § 9622(e)(2)(C)).

BOARD ACTION

This item is for informational purposes only.

NAEP 2022 Reading and Mathematics Results

Paul Kleinert, PhD
Idaho State Department of Education

1

NAEP Subjects

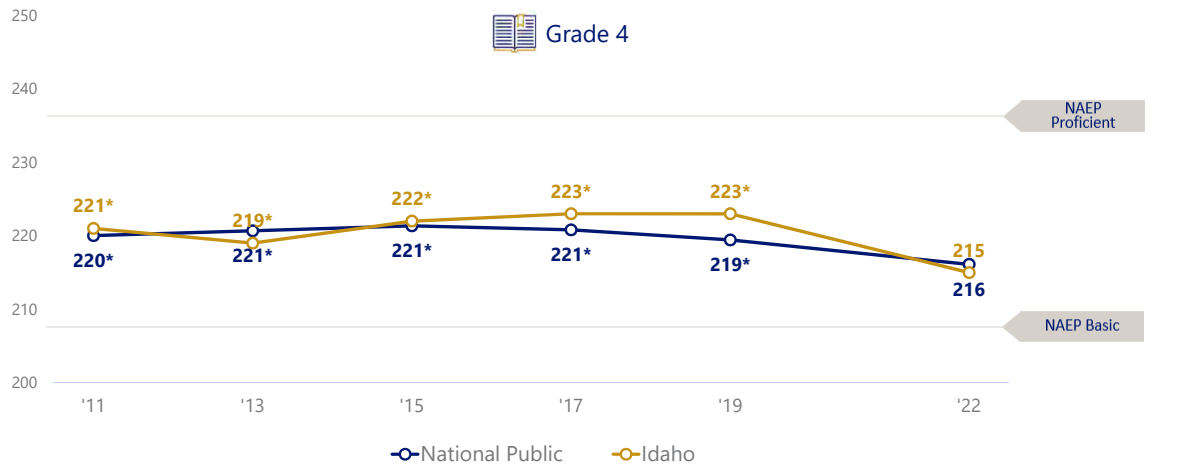
2

Grade 4 Reading Results

2022 Idaho average scale score (0–500)	7	38	5
ID - 215	# jurisdictions significantly higher	jurisdictions not significantly different	# jurisdictions significantly lower

3

Average Scale Scores



*Significantly different ($p < .05$) from 2022.

4

Student Group Score Differences

Grade 4 – Differences since 2011

Jurisdiction	All Students	Male	Female	Eligible for NSLP	Students with Disabilities*	English language learners
State	↓6	↓8	↓4	↓7	↓17	↑15
National Public	↓4	↓4	↓4	↓4	↓5	◆

↑ Higher ↓ Lower ◆ No significant change — Not available

Jurisdiction	White	Black	Hispanic	Asian/ Pacific Islander	American Indian/ Alaska Native	Two or more races
State	↓7	—	◆	—	—	—
National Public	↓4	↓7	◆	↑5 / ↓8	↓6	↓4

*Students with disabilities excluding those with a 504 plan.

5

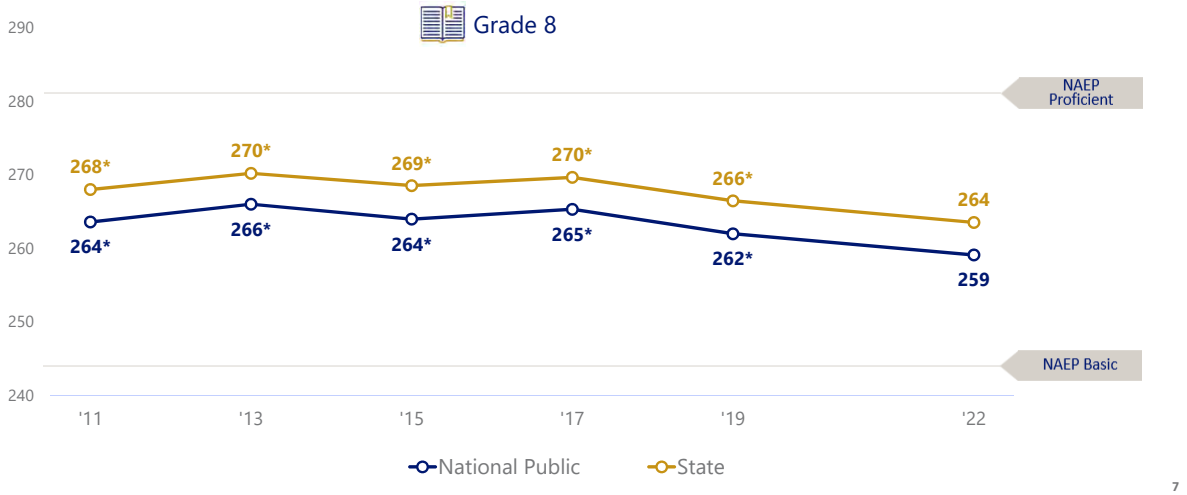
Grade 8 Reading Results

2022 Idaho average scale score (0–500)
ID - 264

2	18	30
# jurisdictions significantly higher	jurisdictions not significantly different	# jurisdictions significantly lower

6

Average Scale Scores



*Significantly different ($p < .05$) from 2022.

7

Student Group Score Differences

Grade 8 – Differences since 2011

Jurisdiction	All Students	Male	Female	Eligible for NSLP	Students with Disabilities*	English Learners
State	↓4	↓5	↓5	↓6	◆	↓7
National Public	↓4	↓4	↓5	↓4	◆	◆

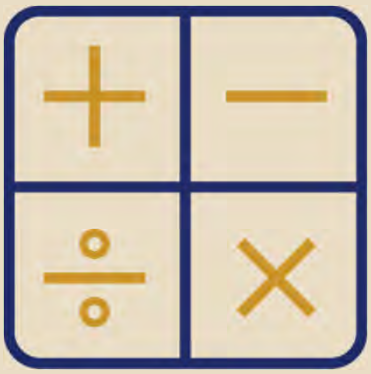
↑ Higher ↓ Lower ◆ No significant change — Not available

Jurisdiction	White	Black	Hispanic	Asian/ Pacific Islander	American Indian/ Alaska Native	Two or more races
State	↓4	—	◆	—	—	—
National Public	↓5	↓5	◆	↑6 / ◆	↓7	↓4

*Students with disabilities excluding those with a 504 plan.

8

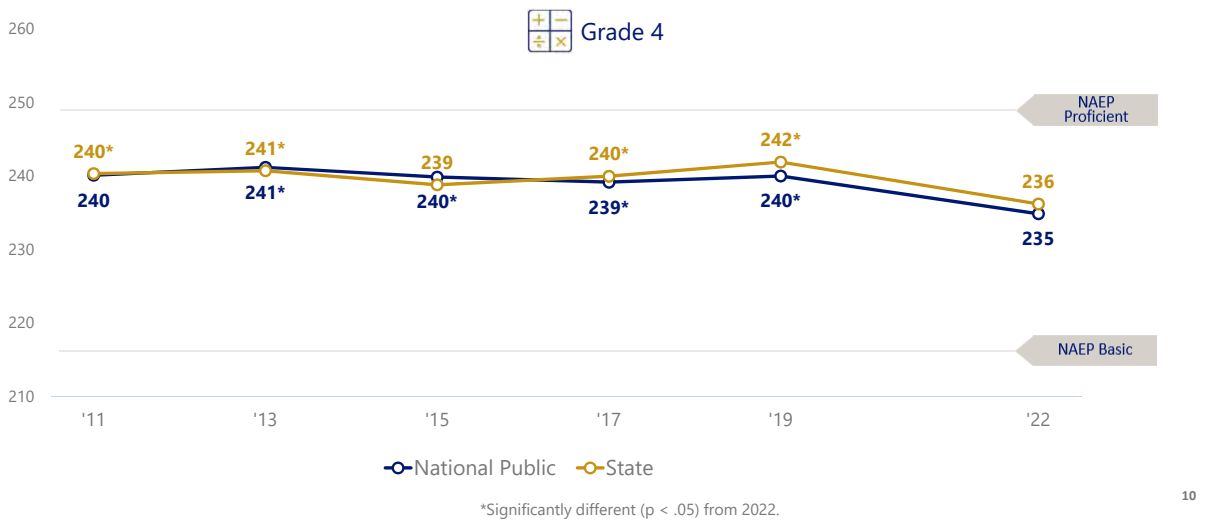
Grade 4 Mathematics Results



2022 Idaho average scale score (0–500)	7	28	15
ID - 236	# jurisdictions significantly higher	jurisdictions not significantly different	# jurisdictions significantly lower

9

Average Scale Scores



*Significantly different ($p < .05$) from 2022.

10

Student Group Score Differences

Grade 4 – Differences since 2011

Jurisdiction	All Students	Male	Female	Eligible for NSLP	Students with Disabilities*	English Learners
State	↓4	◆	↓9	↓6	◆	◆
National Public	↓5	↓3	↓7	↓7	◆	↓4

↑ Higher ↓ Lower ◆ No significant change — Not available

Jurisdiction	White	Black	Hispanic	Asian/ Pacific Islander	American Indian/ Alaska Native	Two or more races
State	◆	—	↓4	—	—	—
National Public	↓4	↓7	↓5	◆/↓13	↓7	↓6

*Students with disabilities excluding those with a 504 plan.

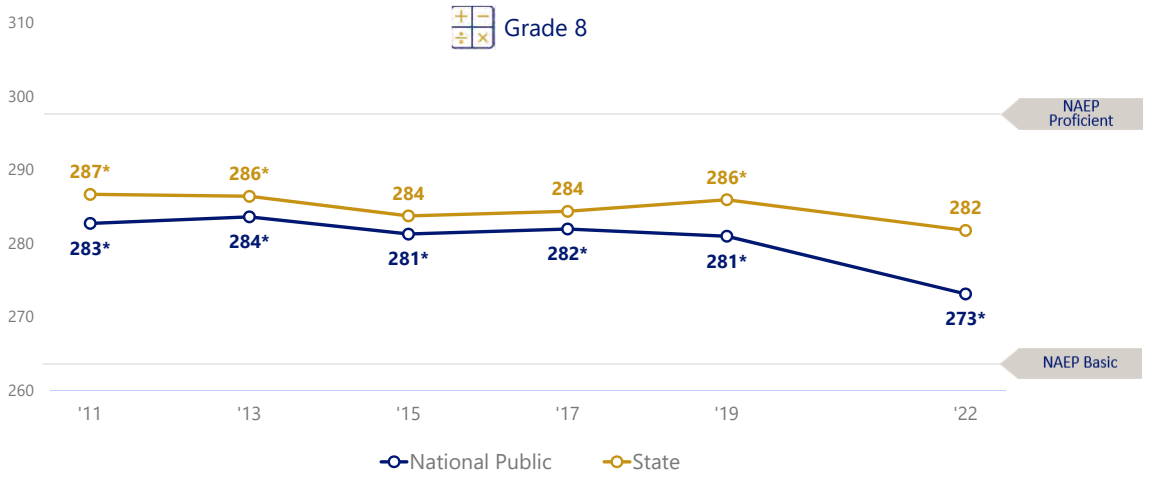
11

Grade 8 Mathematics Results

2022 Idaho average scale score (0–500)	0	11	39
ID - 282	# jurisdictions significantly higher	jurisdictions not significantly different	# jurisdictions significantly lower

12

Average Scale Scores



*Significantly different ($p < .05$) from 2022.

13

Student Group Score Differences

Grade 8 – Differences since 2011

Jurisdiction	All Students	Male	Female	Eligible for NSLP	Students with Disabilities*	English Learners
State	↓5	↓4	↓5	↓7	◆	↓11
National Public	↓10	↓9	↓10	↓9	↓9	◆

↑ Higher ↓ Lower ◆ No significant change — Not available

Jurisdiction	White	Black	Hispanic	Asian/ Pacific Islander	American Indian/ Alaska Native	Two or more races
State	◆	—	◆	—	—	—
National Public	↓9	↓10	↓9	◆/◆	↓9	↓11

*Students with disabilities excluding those with a 504 plan.

14

SUBJECT

Assessment Item Review Committee Recommendations

REFERENCE

February 2015	The Board approved the removal of an audio clip and associated items per the recommendation of the committee members.
December 2016	The Board approved the removal of the three (3) ELA, on (1) grade 11 passage with five (5) associated items, one (1) grade 8 passage with eleven (11) associated items, and one (1) grade 6 math item.
October 2017	The Board approved the removal of one (1) grade 4 ELA item.
November 2018	The Board approved the removal of one (1) grade 5 ELA Item.
June 2019	Board approved the appointment of twelve (12) new committee members.
October 2019	The Board approved the removal of one (1) High School ELA item and one (1) High School Science item.
August 24, 2022	The Board approved appointment of eleven (11) new committee members.

APPLICABLE STATUTE, RULE, OR POLICY

Section 33-134, Idaho Code
Idaho Administrative Code, IDAPA 08.02.03, Rules Governing Thoroughness

BACKGROUND/DISCUSSION

In accordance with Section 33-134, Idaho Code, the Board approved a review committee of thirty (30) individuals from each of the six (6) educational regions in the state, representing parents of students, teachers, administrators, and school board members in Idaho's public education system. The committee is required to have two parents, one public school or charter school teacher, one school district or public charter school administrator, and one member from the board of trustees or charter school board of directors for each of the six education regions. The committee reviews the computer adaptive test questions on the summative Idaho Standards Achievement Test (ISAT) developed by the Smarter Balanced Consortium, in English Language Arts (ELA)/Literacy and Math, the computer adaptive test questions on the summative ISAT developed by Idaho's assessment vendor, Cambium Assessment, Inc., in Science, and the computer adaptive test questions on the summative Idaho Alternate Assessment (IDAA) developed by Cambium Assessment, Inc., in English Language Arts (ELA)/Literacy, Math, and Science.

The committee is authorized to make recommendations to the Board and the State Department of Education to revise or eliminate summative computer adaptive test

questions from the assessment forms. The Board shall make the final determination regarding the adoption or rejection of the committee's recommendations.

The Assessment Review Committee is recommending the removal of one (1) Grade 4 ELA/L item. The basis of this decision is detailed in the 2022 Assessment Review Committee Report in Attachment 1.

IMPACT

The recommendation from the 2022 review committee *does no*t incur additional costs. However, the review itself cost a total of $ 90,530.01. See Attachment 3.

ATTACHMENTS

Attachment 1 – 2022 Assessment Item Review Committee Report
Attachment 2 – 2022 Assessment Item Review Committee Presentation
Attachment 3 – 2022 Assessment Item Review Expenditure Report
Attachment 4 – Letter from a Committee Member
Attachment 5 – Assessment Item Review Committee Membership

STAFF COMMENTS AND RECOMMENDATIONS

Pursuant to Section 33-134, Idaho Code, the Assessment Item Review Committee is charged with reviewing "all summative computer adaptive test questions" for bias and sensitivity. The statutory requirement applies to all summative computer adaptive assessments administered at the state level. This includes the Idaho Standards Achievement Test for English Language Usage and Mathematics. Following the review process, the committee may make recommendations to the Board for removal of any test questions that the committee determines may be biased or unfair to any group of test takers, regardless of differences in characteristics, including, but not limited to, disability status, ethnic group, gender, regional background, native language or socioeconomic status.

The Idaho Standards Achievement Test developed by the Smarter Balanced Assessment Consortium is refreshed each year it is administered through the addition of new assessment items. As part of Idaho's participation in the consortium the state has access to the refreshed assessment and new assessment items. The committee reviews only the new items that are added each year. Items are added in both mathematics and English language usage. In 2015, 361 combined items were added; in 2016 798 items were added, and in 2017 1,051 items were added. The provided information indicates the committee reviewed 14,074 assessment items.

Assessment items are confidential and available for use by all states participating in the Smarter Balanced Assessment Consortium. Publicly disclosing the assessment item would compromise its validity for use by other states. To maintain the integrity of the assessment items, the specific item being requested

for removal must be requested from the Department by the individual Board members so they can provide the necessary information to review the confidential items.

BOARD ACTION

I move to approve the recommendation of the Assessment Review Committee to remove one (1) Grade 4 ELA/Literacy item from the 2023 item pool of the Idaho Standards Achievement Test.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

OR

I move to reject the recommendation from the Assessment Review Committee and retain all new items in the 2023 item pool of the Idaho Standards Achievement Tests.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

STATE DEPARTMENT OF EDUCATION

Bias and Sensitivity Committee Report
October 2022

SECTION 1: BACKGROUND AND INTRODUCTION

In accordance with Idaho Code § 33-134 – Assessment Item Review Committee, the Cambium Assessment, Inc. (CAI) and the Idaho State Department of Education (SDE) established a review committee intended to ensure that stakeholders of Idaho's public education system (parents, teachers, administrators, and school board members) have the opportunity to review the types of questions that are being used on Idaho state assessments. The law requires that a committee annually review all summative computer adaptive test questions for possible issues of bias and sensitivity. The committee is authorized to make recommendations to the State Board of Education regarding the revision or elimination of summative computer adaptive test questions from the state assessments. According to the law, the committee is to consist of at least 30 Idaho residents and shall include the following members from the six regions of Idaho and shall be appointed by the State Board of Education: two parents of public school or public charter school students; one public school or public charter school teacher; one member who is an administrator of a school district or public charter school; and one member from the district board of trustees or public charter school board of directors.

SECTION 2: FOUR ROUND REVIEW PROCESS

The Round 1 review process in 2022 was adjusted so each item was reviewed by one (1) committee member, chosen at random from the overall committee pool. Items that were "flagged" as displaying bias and sensitivity issues moved on to Round 2 for small group discussions and review.

In Round 2, committee members discussed the item(s) flagged in Round 1 in small groups and individually voted on the item(s). Items which were flagged by 50% or more of each small group

(3-4 participants) in Round 2 moved on to Round 3.

Round 3 consisted of an individual review and voted of each item that was flagged for displaying bias and sensitivity issues in Round 2. If a majority of the participants flagged an item in Round 3, that item moved to Round 4.

Round 4 consisted of a large group discussion where committee members shared their point of view and heard the perspectives and input of other members for each item flagged for displaying bias and sensitivity issues in Round 3. After discussion, committee members individually voted anonymously if an item met bias and sensitivity criteria. Items for which a majority of the full committee voted an item does not meet bias and sensitivity criteria were then recommended to the State Board of Education for exclusion from the Idaho test bank in the following spring administration.

SECTION 3: PREPARATION

For ease of assignment and review by the committee, CAI organized the items into batches by subject. Each of the batches was assigned to every committee member at random in the first round.

CAI configured the Item Tracking System software to create a “Bias and Sensitivity (BnS) Survey” in its Content Rater application so that committee members could submit electronic feedback about each item in real time. As shown in Figure 1, the user interface for Content Rater displayed each item with a “click-to-enlarge” box that contained the “Item Rating Question” (with comment boxes for feedback), an “Item Overview” dialog pane, which included information about the content alignment of the item, and an “Item Content Web Preview” dialog pane, which presented a rendering of the item as it would appear to a student taking an actual administration. The Content Rater application contained a single question for the committee to answer: “Bias and Sensitivity: Meets Criteria.” A response of “Yes” or “No” was required for this question on each item that an individual reviewed. If a participant determined that the item did not meet the Bias and Sensitivity criteria as outlined in the training

presentation, then the panelist would select “No.” A “No” response from a committee member would require a comment.

Prior to the committee meeting, CAI created usernames and passwords for each committee member within the Item Tracking System. CAI loaded and randomly pre-assigned batches of items for each committee member to review. Participants were instructed to ask for additional batches as they completed and submitted their initial assignment.

Finally, CAI created seven (7) groups of three (3) or four (4) committee members for Rounds 2 and 3 of the Bias and Sensitivity Review process. Each group included members from different professional backgrounds (Administrator, Parent, Teacher, Board Member, or Parent), and represented different Idaho regions.

SECTION 4: TRAINING

Committee members were trained to identify bias and sensitivity concerns in items annually. The “Idaho Bias & Sensitivity Review” PowerPoint presentation is included in Attachment 2. Additionally, CAI provided a training presentation for the participants to learn what they should be looking for when reviewing items. This presentation included the steps in the item development process, the difference between bias and content related issues, noted that participants should only be flagging items for bias issues, and provided specific examples of items that may show bias. Upon completion of the Bias and Sensitivity training, the committee was trained to use the Item Tracking System and Content Rater to submit their feedback on each item electronically (Figure 1).

Figure 1. Content Rater Interface

SECTION 5: 2022 SUMMARY OF COMMITTEE REVIEW

In October 2022, a total of 14,074 items were presented to the committee.

Table 1. Results of Round 1

Subject	Total Items Reviewed	Number of Items with Zero Flags	Number of Items Flagged for round 2
ISAT ELA/Literacy	5642	5506	136
ISAT Mathematics	4119	4102	17
ISAT Science	618	592	26
IDAA ELA/Literacy	1683	1605	78
IDAA Mathematics	1374	1342	32
IDAA Science	638	621	17
TOTAL	14074	13768	306

Table 2 shows the average cumulative rating time (in seconds) per item for each ISAT and IDAA

subject area: ELA/L, Mathematics, and Science and the average amount of items reviewed by each participant for Round 1. The average cumulative rating time is the average amount of time each reviewer spent reviewing each item.

Table 2. Average Cumulative Rating Time and Items Reviewed by Each Participant for Round 1

Subject	Average Cumulative Rating Time (seconds) Per Item	Average Cumulative Items Reviewed Per Participant
ISAT ELA/Literacy	1.9	246
ISAT Mathematics	2.6	179
ISAT Science	11.7	27
IDAA ELA/Literacy	3.2	74
IDAA Mathematics	3.1	60
IDAA Science	4.2	28
TOTAL	6.1	612

In Round 2, the committee was asked to conduct a small group review on each item that was flagged from Round 1 and then individually vote on each of the flagged items. Prior to members being assigned batches of items to review, CAI provided a reminder about the issues that they should be looking for, specifically bias and sensitivity issues. Committee members used the same Content Rater Interface and were asked to answer the same "Bias and Sensitivity: Meets Criteria" question. A response of "Yes" or "No" was required for each item; if individuals determined the item did not meet the Bias and Sensitivity criteria as outlined in the training

presentation and the L.A.B.S. guidelines, then he/she answered the "Bias and Sensitivity: Meets Criteria" question "No," and entered a comment explaining his/her reasoning.

A detailed summary of the results of Round 2 is provided in Table 3.

Table 3. Results of Round 2

Subject	Total Items Reviewed	Number of Items with Zero Flags	Number of Items Flagged for Round 3 Review
ISAT ELA/Literacy	136	105	31
ISAT MATHEMATICS	17	14	3
ISAT SCIENCE	26	20	6
IDAA ELA/Literacy	78	66	12
IDAA MATHEMATICS	32	30	2
IDAA SCIENCE	17	13	4
TOTAL	306	248	58

A majority vote rule was established for moving items from Round 2 to Round 3 and followed the design of all previous Bias and Sensitivity Committee Review meetings. CAI analyzed the items that were flagged by 2/3 of all committee members after Round 2.

During Round 3, committee members individually voted on each item flagged for bias and sensitivity issues from Round 2. Any item receiving a majority vote from members in attendance in Round 3 were sent to Round 4. As detailed in Table 4, the committee found Bias

and Sensitivity concerns with one ISAT ELA/L item.

Table 4. Results of Round 3 Analysis

Subject	Total Items Reviewed	Number of Items with Zero Flags	Number of Items Flagged for Round 4 Review
ISAT ELA/Literacy	31	30	1
ISAT MATHEMATICS	3	3	0
ISAT SCIENCE	6	6	0
IDAA ELA/Literacy	12	12	0
IDAA MATHEMATICS	2	2	0
IDAA SCIENCE	4	13	0
TOTAL	58	57	1

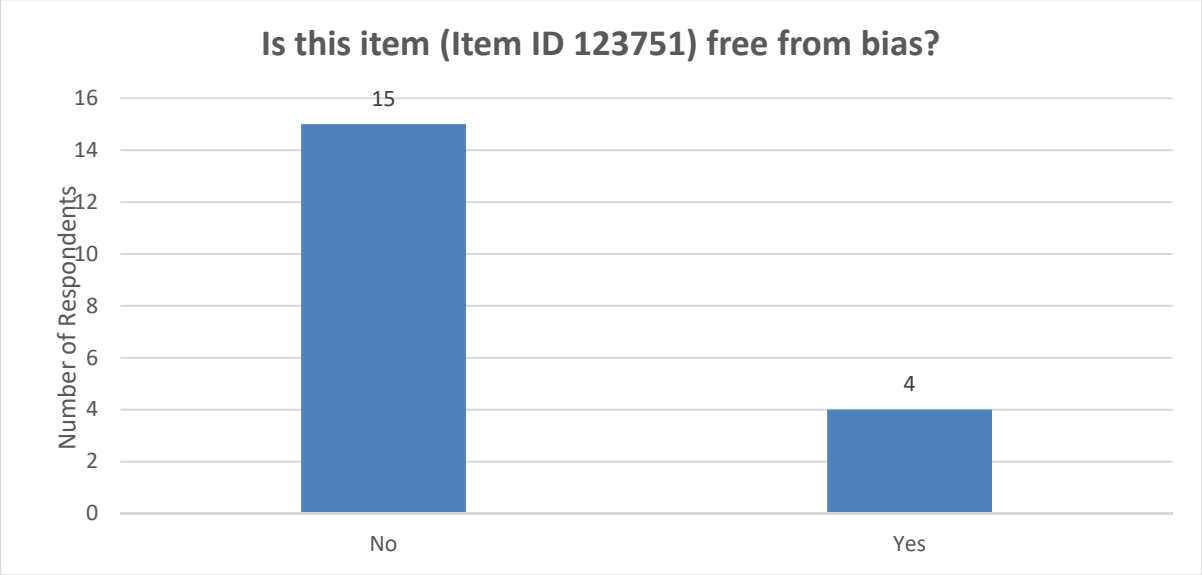
During Round 4, committee members convened a whole group discussion about the items flagged for bias and sensitivity issues from Round 3. After the discussion, the committee members individually voted on each remaining item. If an item received a majority vote for bias and sensitivity issues, the item will be considered “Rejected” by the committee and will go to the Idaho State Department and Board of Education for review. The only item that was Rejected by the Bias and Sensitivity Committee was an ISAT ELA/L item, Item ID: 123751.

Final Result

Of the 14074 items reviewed by the committee per Idaho Code § 33-134,

- One (1) Grade 4 ISAT ELA/L item was determined to not pass the Idaho Bias and Sensitivity guidelines.

Figure 23. Round 4 Results for ISAT ELA/L Item 123751



Implications of Excluding the Proposed Item

CAI has completed the analysis of the impacted Item Bank pools to determine risks associated with rejecting the item identified by the 2022 Bias and Sensitivity Committee. Based on the State Board of Education's decision in previous years to exclude all items and passages recommended by the Bias and Sensitivity Committee, Idaho has a separate item configuration for the online delivery of the ELA/L assessments. This requires an annual fee of $57,000 to configure a unique item bank for Idaho. Exclusion of the items proposed by the 2022 Bias and Sensitivity Committee will not incur additional costs by the Idaho State Department of Education.

Item 123751 will be presented to the Idaho State Board of Education to decide if the item should be removed from the ISAT ELA/Literacy Assessment.

For additional questions, please contact Ayaka Nukui, Interim Director of Assessment & Accountability, at the Idaho State Department of Education (208-332-6926 or anukui@sde.idaho.gov).

IDAHO| OCTOBER 10 – 14, 2022

FAIRNESS REVIEW STAKEHOLDER MEETING

Cambium Assessment, Inc. |Idaho Department of Education

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Assessment Item Review Committee

October 10-14, 2022

Supporting Schools and Students to Achieve

SHERRI YBARRA, ED.S., SUPERINTENDENT OF PUBLIC INSTRUCTION

Welcome and Thank You

- Thank you for volunteering your time to participate in the 2022 Assessment Item Review Committee Meeting.

Support Staff

- SDE Personnel
  - Ayaka Nukui
  - Israel Silva
- Cambium Personnel
  - Cameron Benham
  - Ayanna Releford
  - Ted Warzynski

Background

- Formed by the Idaho Legislature in 2014 through Idaho Code 33-134.
- Last met in fall 2019.
- A total of 30 members from 6 regions from various background.

Purpose

- To ensure that statewide assessments measure what they intend to measure (i.e. student's knowledge and skills) by removing questions that could unfairly interfere with student performance.

Your Role

- To make recommendations to the State Board of Education to revise or eliminate questions that could interfere with student performance.

Statewide Assessments

- Idaho Standards Achievement Test (ISAT)
  - Grades 3-8, HS
  - English language arts, mathematics, science
  - Administered in March-May
  - All students (except for those who qualify for IDAA)
- Idaho Alternate Assessment (IDAA)
  - Grades 3-8, HS
  - English language arts, mathematics, science
  - Administered in March-May
  - For students with significant cognitive disabilities

What's Next?

- Training
- Review Items
- Review Items
- Review Items
- ...
- Possibly Virtual Follow-up (if not finished)

Questions?

Contact

Reimbursement

Israel Silva | Administrative Assistant
Assessment & Accountability
Idaho State Department of Education
208-332-6977 | isilva@sde.idaho.gov

Program

Ayaka Nukui | Interim Director
Assessment & Accountability
Idaho State Department of Education
208-332-6926 | anukui@sde.idaho.gov

Supporting Schools and Students to Achieve
SHERRI YBARRA, ED.S., SUPERINTENDENT OF PUBLIC INSTRUCTION

Test Security

- Non-disclosure agreements should have already been signed.
- All test materials viewed during this meeting are considered secure.
- Do NOT discuss test material content outside of this meeting.

12

Agenda

Day 1 Meeting Agenda (October 10, 2022)

Times (MT)	Activity	Speaker(s)/Presenter(s)
8:00 – 8:30	**Breakfast**	
8:30 – 9:00	Check In	CAI Program Mngt. & SDE Staff
9:00 – 9:15	Welcome/Introductions/Overview	CAI Program Mngt. & SDE Staff
9:15 – 9:45	Item Review Training	Ted Warzynski
9:45 – 10:30	Individual Item Review: ISAT Science Round 1	
10:30 – 10:45	**Break**	
10:45 – 12:00	Individual Item Review: ISAT Science Round 1	
12:00 – 1:00	**Working Lunch**	
1:00 – 2:30	Individual Item Review: ISAT Science Round 1	
2:30 – 2:45	**Break**	
2:45 – 5:00	Facilitated Item Review: ISAT Science Round 2	Small Groups
5:00	Adjourn	

Day 2 Meeting Agenda (October 11, 2022)

Times (MT)	Activity	Speaker(s)/Presenter(s)
8:00 – 8:30	**Breakfast**	
8:30 – 9:00	Check In	CAI Program Mngt. & SDE Staff
9:00 – 10:30	Individual Item Review: IDAA ELA Round 1	
10:30 – 10:45	**Break**	
10:45 – 12:00	Facilitated Item Review: IDAA ELA Round 2	Small Groups
12:00 – 1:00	**Working Lunch**	
1:00 – 2:30	Individual Item Review: IDAA Math Round 1	
2:30 – 2:45	**Break**	
2:45 – 5:00	Facilitated Item Review: IDAA Math Round 2	Small Groups
5:00	Adjourn	

Day 3 Meeting Agenda (October 12, 2022)

Times (MT)	Activity	Speaker(s)/Presenter(s)
8:00 – 8:30	**Breakfast**	
8:30 – 9:00	Check In	CAI Program Mngt. & SDE Staff
9:00 – 10:30	Individual Item Review: IDAA Science Round 1	
10:30 – 10:45	**Break**	
10:45 – 12:00	Facilitated Item Review: IDAA Science Round 2	Small Groups
12:00 – 1:00	**Working Lunch**	
1:00 – 2:30	Individual Item Review: ISAT ELA Round 1	
2:30 – 2:45	**Break**	
2:45 – 5:00	Individual Item Review: ISAT ELA Round 1	
5:00	Adjourn	

Day 4 Meeting Agenda (October 13, 2022)

Times (MT)	Activity	Speaker(s)/Presenter(s)
8:00 – 8:30	**Breakfast**	
8:30 – 9:00	Check In	CAI Program Mngt. & SDE Staff
9:00 – 10:30	Individual Item Review: ISAT ELA Round 1	
10:30 – 10:45	**Break**	
10:45 – 12:00	Individual Item Review: ISAT ELA Round 1	
12:00 – 1:00	**Working Lunch**	
1:00 – 2:30	Individual Item Review: ISAT Math Round 1	
2:30 – 2:45	**Break**	
2:45 – 5:00	Facilitated Item Review: ISAT Math Round 1	
5:00	Adjourn	

13

Agenda

Day 5 Meeting Agenda (October 14, 2022)

Times (MT)	Activity	Speaker(s)/Presenter(s)
8:00 – 8:30	**Breakfast**	
8:30 – 9:00	Check In	CAI Program Mngt. & SDE Staff
9:00 – 10:30	Facilitated Item Review: ISAT ELA Round 2	Small Groups
10:30 – 10:45	**Break**	
10:45 – 12:00	Facilitated Item Review: ISAT ELA Round 2	Small Groups
12:00 – 1:00	**Working Lunch**	
1:00 – 2:30	Facilitated Item Review: ISAT Math Round 2	Small Groups
2:30 – 2:45	**Break**	
2:45 – 4:30	Facilitated Item Review: ISAT Math Round 2	Small Groups
4:30 – 5:00	Closing Statements	CAI Program Mngt. & SDE Staff
5:00	Adjourn	

14

Steps in the Development Process

Steps in Item Development Process

- Item development
- Client review/approval
- Educator Review (Content & Fairness)
- Field Test with Students
  - Rubric Validation and Data Review
- Idaho Stakeholder Review (Fairness)
- Operational Use

16

Fairness Review Process

Assessment Fairness

Purpose:

- Test materials need to be free from unnecessary barriers to the success of diverse groups of students.

Why?

1. Valid measurement of student achievement.
2. Positive student experience.

Assessment Fairness

Assessment content is…

1. free of bias and stereotypes.
2. sensitive to student and community beliefs and experiences.
3. accessible to all students, to the greatest extent possible.

Assessment Fairness

<u>Assessment content is free of bias and stereotypes.</u>

- Assessment content does not express bias or present stereotypes of people of different groups.
- Assessment content demonstrates respect for people of different groups.
- Assessment content is inclusive and reflects the diversity of the community.

Assessment Fairness

Assessment content is free of bias and stereotypes.

- Gender
- Race, Ethnicity, Culture
- Religion
- Age
- Disability
- Socioeconomic

Assessment Fairness

Assessment content is sensitive to student and community beliefs and experiences.

- Assessment content does not include topics that are considered controversial by the community, unless these topics are part of the learning standards.
- Assessment content avoids emotionally-charged topics.
- Assessment content does not give advice or promote specific morals, unless these are universally accepted.
- Assessment content does not depict people engaged in dangerous activities.

Assessment Fairness

Assessment content is sensitive to student and community beliefs and experiences.

- Does the material require a student to take a position that challenges authority?
- Does the material present sensitive or highly controversial subjects, such as death, war, abortion, euthanasia, or natural disasters, except where they are needed to assess learning standards?
- Does the material trivialize significant or tragic human experiences?
- Does the material require the parent, teacher, or examinee to support a position that is contrary to their religious beliefs?
- Does the material contain advice pertaining to health and well-being about which there is not universal agreement?
- Does the material portray people engaged in dangerous activities, unless required to assess the learning standard?

Assessment Fairness

Assessment content is accessible to all students to the greatest extent possible.

- Language used in the assessment is understandable and inclusive.
  a. Does the material use exclusive or gender-specific terms rather than inclusive terms?
  b. Does the material use words or phrases that may not be similarly understood by students of different groups?
- Assessment content does not rely on vocabulary or background knowledge that would be significantly more or less familiar to a student because of their demographic group. (Differential familiarity)
  a. Does the material require knowledge of individuals, events, or groups that is not familiar to all groups of students?

Fairness Review Process

1. Enter Content Rater system and begin batch.
2. Review each item from a fairness perspective.
   a. Utilize Fairness Criteria Guidelines if needed
   b. Document comments and answers to questions in content rater for discussion
3. Items flagged for possible BNS concern go to Round #2 (small group review)

25

Norms and Participant Guidelines

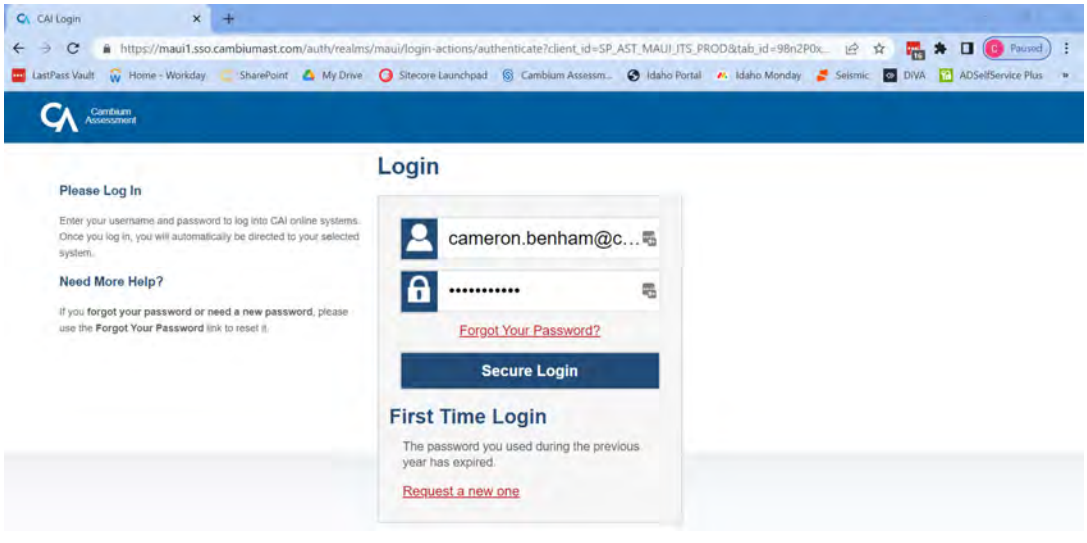
Participant Guidelines

- Do not record, screenshot, or download specific content
- After the meeting, destroy any personal notes related to content or phenomenon discussed
- Do not speak to other panelists about specific passages or items outside of the meeting.
- To limit disruptions, try to take breaks at designated break times.
- If you have any questions about the review or procedures, feel free to ask Cambium staff

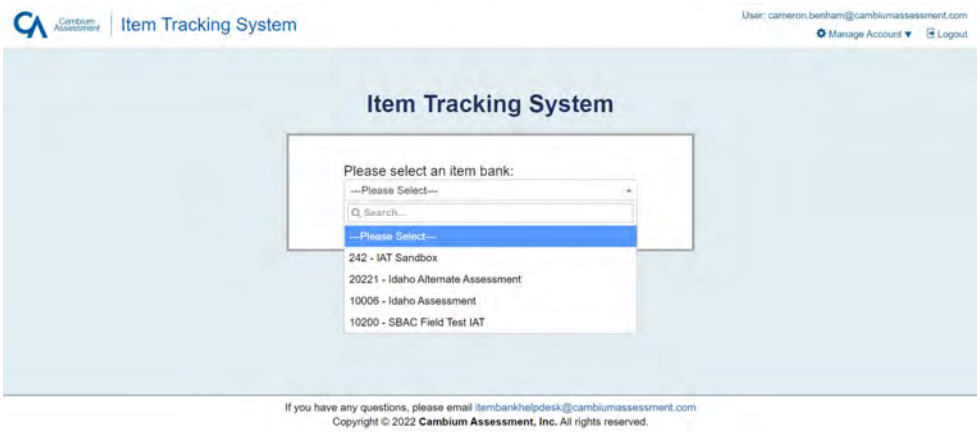
Questions?

Accessing Content Rater

Accessing Content Rater



Accessing Content Rater



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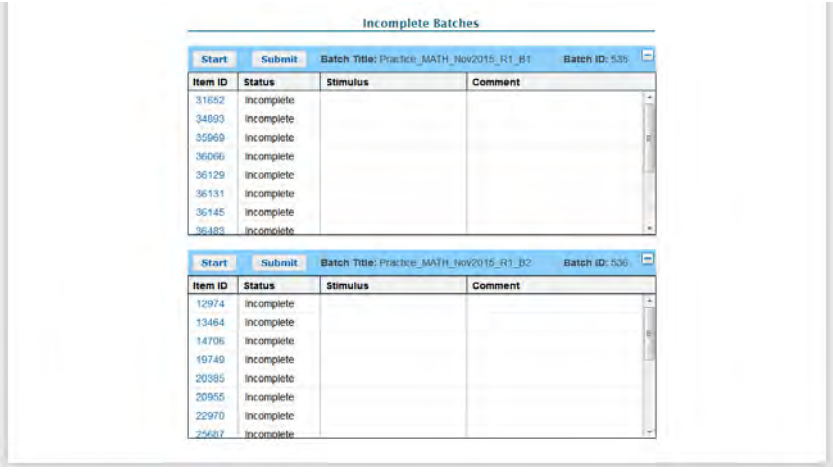

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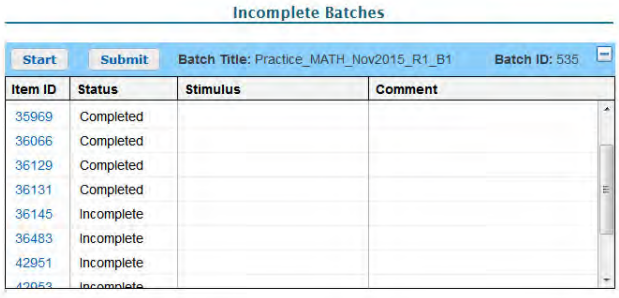
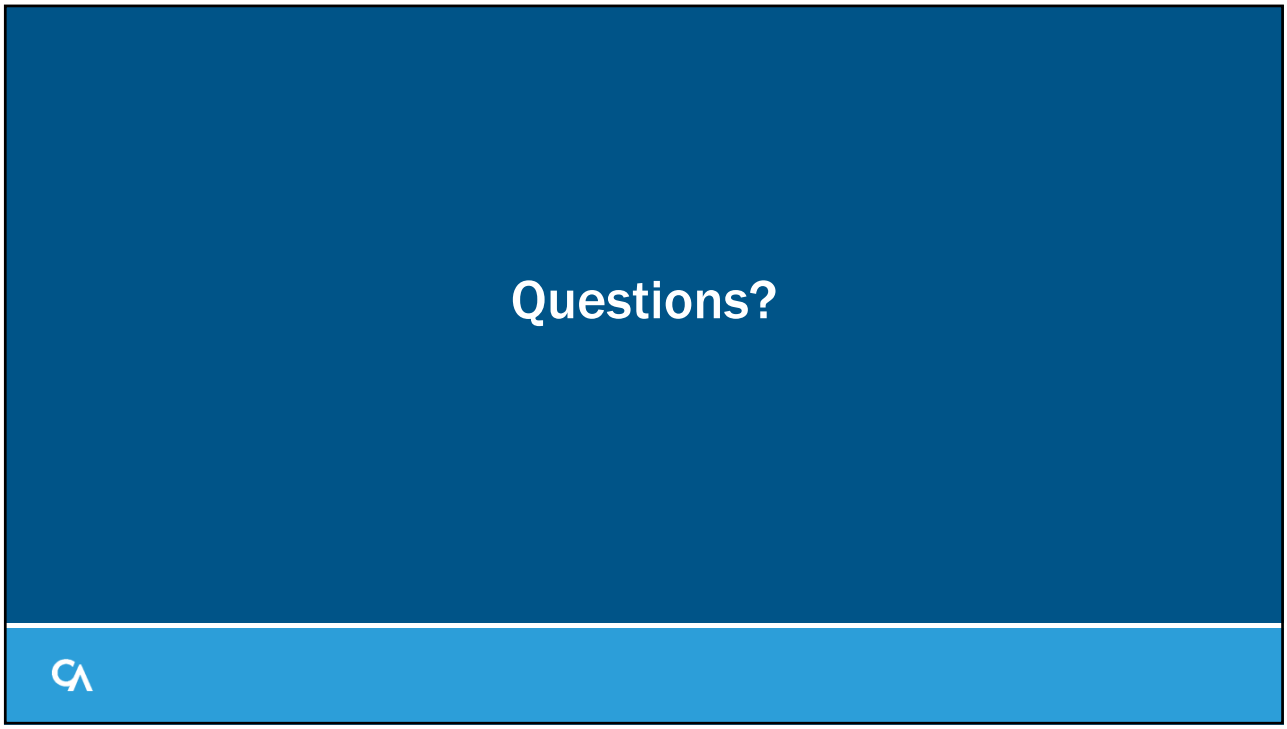



Questions?

2022 BIAS AND SENSITIVITY MEETING COSTS

Type of Cost	Cost incurred
Est. Total Sub Reimbursement	$700.00
Est. Total Travel Costs	$5,829.52
Est. Total Per Diem Dinner Costs	$2,609.39
Est. Total Travel Reimbursement	**$9,138.91**
Total Room Costs	$11,907.00
Total catering Costs	$3,484.11
Total Meeting Room Costs	$2,000.00
Total Hotel Costs	**$17,391.11**
Contract Cost from Cambium	**$64,000.00**
Est. Total Meeting Costs	**$90,530.01**

Note. Travel reimbursement is an estimate as of Nov 9, 2022, as the participants are still sending in the travel reimbursement forms.

Documentation of safe guards must be reviewed available by review

Timothy Hunt, Ph. D.
Consulting Services for Non-Profit Organizations
8674 N. Maple Street Hayden, Idaho 83835
thunt3@Frontier.com 208-772-2541

In Idaho, we worry about a lot of things—water rights, land use, health care and so on. I am not sure that worry is appropriate but certainly concern and interest are important. Add to that list education—we worry a lot about education.

Years ago, I answered a news story in the Coeur d'Alene PRESS seeking volunteers for a group formulated by the Idaho Department of Education (IDOE), as authorized by the Legislature, called the Bias and Sensitivity Committee. Composed of five people from each of Idaho's six education regions—parents, teachers, administrators, and school board members—the Committee was charged with examining standardized questions administered to Idaho students, elementary school to twelfth grade. Though I spent my career in education as a college professor and administrator that experience did not count because it was not in the public schools—I am a founding member since 2015, as a parent and grandparent. This year, twenty-two of us gathered in Boise for a week in October to read and evaluate about 8000 questions. It was simply not possible to locate thirty people who could be away from home and work for a week. Our charge was simple--the same as it has been every year--to root out questions that might be biased or insensitive to Idaho students. In the first year the Committee numbered 84 because there were 36,000 questions to be evaluated. Each question is read by three people. If two object to a question, it is referred to a different group. That rule is unchanged.

The program is administered by the Department of Education Assessment and Accountability Department and a contractor hired by the State, Cambium Assessment, a division of Cambium Learning Group. Both were ably represented in Boise for our annual meeting—well, annual except for two years of Covid. As an original Committee member I was happy to see some familiar faces from around the State and to meet some people who were there for the first or second time. A more cheerful, hard-working, interested, and intelligent lot would be hard to imagine. For whatever reasons, there were three or four males and a lot of women who work in special education; I was told their schedules are more flexible than those of classroom teachers. We worked from 9-5 on Monday and Tuesday; since we were more efficient than anticipated we had a shorter day on Wednesday and an even shorter day on Thursday. A veteran of many scheduling projects, I empathize with those who had to guess how long it would take 22 folks to read 8000 questions. I remember many years ago trying to figure how many parts a punch press operator could produce in eight hours. It was a comedy of errors. Anyway, we finished a day early in Boise and most of us left on Thursday.

Questions on our standardized tests are written by teachers; they then go to Cambium for editorial changes; they then come back to the IDOE for further editing, then back to Cambium and, finally, to the Bias and Sensitivity Committee for final evaluation. Security is tight, as you might well imagine; no one wants for those questions to leak because they would be useless if that happened.

Idaho is part of a consortium, Smarter Balanced, for testing and other purposes. It comprises thirteen states, the US Virgin Islands, and the Bureau of Indian Affairs. Producing all of those tests and all of those questions would be extremely expensive and time consuming if each state had to do so on its own. But, of course, as soon as we contract out our tests to a company like Cambium many questions arise. In Idaho, I think, the primary question would be: Are these tests in the hands of liberals in Washington, DC, who are seeking to indoctrinate our children?

I can only say this. I wish I had been on this Committee prior to my forty some years in higher education because Cambium and the teachers it employs to write questions do a far, far better job than I ever did and I was pretty good at testing. I am not sure how many of the 8000 questions I read but probably about a thousand, give or take. Out of the lot, I discovered three or four that I thought could benefit from rewriting and I was given the opportunity to express those misgivings in writing; I am sure they will be addressed and corrected. As for the Committee's work, I signed a confidentiality agreement so will be vague—we found very few questions that bothered us and I doubt whether other citizens, liberal or conservative, would disagree if had they been in that room with us. The questions test knowledge and abilities that nearly all of us would agree are useful and essential.

And so, hats off to the IDOE! The citizenry of Idaho can rest assured that Assessment in this State is fair, comprehensive, and worthwhile. There are no political leanings, left or right. I learned things from reading those questions about fish in the ocean, baking a

pie and how to figure how many tiles one foot by one foot it takes to cover a bathroom wall. Gosh, that Committee is worth the effort and lots of fun! We have begun, by the way, to recruit for next year's committee. It is not exactly a vacation in Boise (it is always too cold for the outdoor swimming pool) but I always return with a feeling of accomplishment.

ATTACHEMENT 5

Assessment Item Review Committee Membership

REGION	ROLE	FIRST	LAST
1	Parent	Timothy	Hunt
1	Parent	David	Brinkman
1	Teacher	Neko	Wells
1	Administrator	kelly	Leighton
1	School Board Member	Michelle	Lippert
2	Parent	Joyce	McFarland
2	Parent	Angel	Sobotta
2	Teacher	Bill	Hayne
2	Administrator	James	Doramus
2	School Board Member	Leslie	Baker
3	Parent	Tanya	Koyle
3	Parent	Wendy	Nielson
3	Teacher	Kim	Arrasmith
3	Administrator	Nicole	Kristensen
3	School Board Member	Joyce	Thomas
4	Parent	Kathy	Millar
4	Parent	Darlene	MatsonDyer
4	Teacher	Sasha	Anderson
4	Administrator	Maria	Garcia
4	School Board Member	Bryan	Whitmarsh
5	Parent	Shelly	Humphreys
5	Parent	Raini	Hayden
5	Teacher	Teresa	Jackman
5	Administrator	Carmelita	Benitez
5	School Board Member	Hillary	Radcliffe
6	Parent	Tara	Ruth
6	Parent	Laura	Wallis
6	Teacher	Bonnie	Warne
6	Administrator	Chad	Angell
6	School Board Member	Karen	Pyron

TAB	DESCRIPTION	ACTION
1	**BOARD POLICY III.N. STATEWIDE GENERAL EDUCATION – FIRST READING**	Action Item
2	**BOARD POLICY III.E. CERTIFICATES AND DEGREES – SECOND READING**	Action Item
3	**BOARD POLICY III.Z. PLANNING AND DELIVERY OF POSTSECONDARY PROGRAMS AND COURSES – SECOND READING**	Action Item
4	**OPEN EDUCATIONAL RESOURCES (OER) REPORT**	Information Item

SUBJECT

Board Policy III.N., Statewide General Education – First Reading

REFERENCE

December 2016	The Board approved the first reading of Board Policy III.N. clarifying oral communication competencies.
February 2017	The Board approved the second reading of Board Policy III.N.
August 2017	The Board approved the first reading of Board Policy III.N. amending the makeup of the committee and setting a timeline for competency review.
October 2017	The Board approved the second reading of Board Policy III.N.
August 2018	The Board approved the first reading of proposed amendments to Board Policy III.N. establishing a common course indexing system within the General Education Matriculation (GEM) framework to assist with transfer.
October 2018	The Board approved the second reading of proposed amendments to Board Policy III.N.
August 2019	The Board approved the first reading of proposed amendments to Board Policy III.N. clarifying process for changes to common course index.
October 2019	The Board approved the second reading of proposed amendments to Board Policy III.N.
October 2020	The Board approved the first reading of proposed amendments to Board Policy III.N. designating the Executive Director or designee as chair of the GEM Committee.
December 2020	The Board approved the second reading of proposed amendments to Board Policy III.N.
August 2021	The Board approved the first reading of proposed amendments to Board Policy III.N. expanding membership of the GEM Committee to representatives from digital learning, dual credit, and open education. This included amendments to GEM competency areas.
October 2021	The Board approved the second reading of proposed amendments to Board Policy III.N.

APPLICABLE STATUTE, RULE OR POLICY

Idaho State Board of Education Governing Policies & Procedures, Section III.N. and III.V.

Section 33-3729, Idaho Code

BACKGROUND/DISCUSSION

Board Policy III.N., General Education, outlines the statewide General Education Framework, which provides guidance to Idaho's public institutions in identifying courses that meet the General Education Matriculation (GEM) competencies for the facilitation of seamless credit transfer for students. Board Policy III.V. Articulation and Transfer, governs the articulation of students and transfer of credits between Idaho's public postsecondary institutions. In addition, Section 33-3729, Idaho Code, states that a student who "completed the general education framework as defined by the state board of education, without an associate of arts or associate of science degree, and transfers from a postsecondary institution in Idaho accredited by a regional accrediting body recognized by the state board of education will not be required to complete additional general education requirements at the receiving Idaho public postsecondary institution." In the event of a conflict between board policy and state statute, the statute would govern. This would be inclusive of any institutionally designated general education courses. Board policy III.N. defines that general education framework.

Consistent with Board Policy III.N.6, faculty discipline groups representing all institutions meet at least annually to ensure consistency and relevance of general education competencies and courses approved for their respective GEM competency areas. At this year's General Education Summit, the Oral Communication discipline group recommended amendments to the Oral Communication requirement of the general education framework that will increase the minimum number of credits required from two (2) to three (3). The two-credit minimum for Oral Communication was originally established because, initially one institution was not able to offer a 3-credit class in this area. However, in practice, only 3-credit options existed at most institutions and all institutions now offer a 3-credit option. However, this lower threshold has the potential to create challenges for transfer students in particular. The GEM Committee met on October 7, 2022 to review and discuss the proposed amendment. In order to facilitate the proposed change to Oral Communication, credits will need to decrease in another area. After much discussion, the committee determined to amend the minimum number of credits required for institutionally-designated from six (6) to five (5).

Other amendments include removing the diagram from policy as it is no longer necessary and does not provide any explanatory value.

IMPACT

Approval of the proposed amendments will increase transparency and ease transfer among institutions in the area of Oral Communication.

ATTACHMENTS

Attachment 1 - Board Policy III.N., Statewide General Education – First Reading

BOARD STAFF COMMENTS AND RECOMMENDATIONS

Board staff supports this proposal. Increasing the category of Oral Communication to three credits more fairly represents the experience of most students, and it

reduces a barrier for some transfer students.

Proposed amendments were shared with the Council on Academic Affairs and Programs on December 1, 2022, and shared with the Instruction, Research and Student Affairs committee on December 8, 2022.

BOARD ACTION

I move to approve the first reading of proposed amendments to Board Policy III.N., Statewide General Education, as submitted in Attachment 1.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

ATTACHMENT 1

Idaho State Board of Education
GOVERNING POLICIES AND PROCEDURES
SECTION: III. POSTSECONDARY AFFAIRS
SUBSECTION: N. Statewide General Education **October 2021**

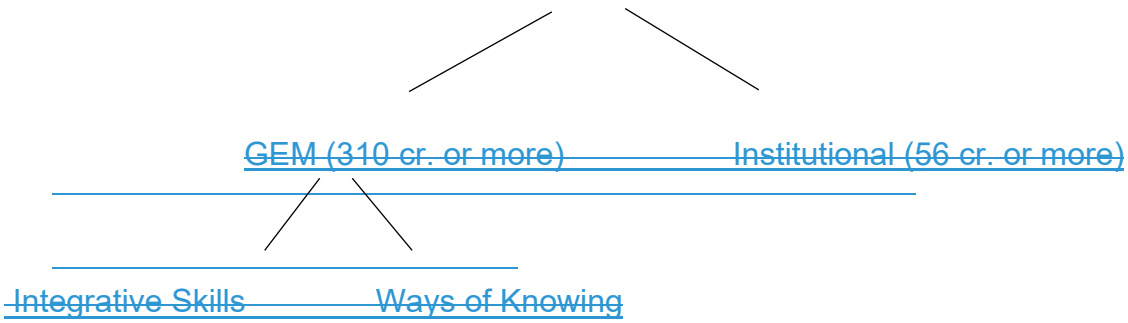
In our rapidly-changing world, students need to understand how knowledge is generated and created. They need to adapt to new opportunities as they arise as well as effectively communicate and collaborate with increasingly diverse communities and ways of knowing. In combination with major coursework, general education curriculum prepares students to use multiple strategies in an integrative manner to explore, critically analyze, and creatively address real-world issues and challenges. General education coursework provides students with an understanding of self, the physical world, and human society—its cultural and artistic endeavors as well as an understanding of the methodologies, value systems, and thought processes employed in human inquiries. General education helps instill students with the personal and civic responsibilities of good citizenship, and prepares them to be adaptive, life-long learners.

This policy shall apply to the University of Idaho, Boise State University, Idaho State University, Lewis-Clark State College, College of Eastern Idaho, College of Southern Idaho, College of Western Idaho, and North Idaho College (hereinafter "institutions").

1. The state of Idaho's general education framework for Associate of Arts, Associate of Science, and Baccalaureate degrees, outlined below in Figure 1, shall be:

   a. Thirty-one (3110) credits or more of the general education curricula must fit within the general education Matriculation (GEM) competency areas defined in subsection 4 of this policy, and
   b. Six Five (56) or more credits of the general education curricula, which are reserved for institutions to address the specific mission and goals of the institution. For this purpose, institutions may create new competency areas or they may choose to count additional credits from GEM competencies. Regardless, these institutionally designated credits must have learning outcomes linked to Association of American Colleges and Universities (AAC&U) Essential Learning Outcomes.

~~**Fig. 1: General education framework reflecting AAC&U Essential Learning Outcomes**~~



2. The intent of the general education framework is to:

    a. Establish statewide competencies that guide institutions' determination of courses that will be designated as GEM courses
    b. Establish shared rubrics that guide course/general education program assessment; and
    c. Create a transparent and seamless transfer experience for undergraduate students.

3. There are six (6) GEM competency areas. The first two (2) emphasize integrative skills intended to inform the learning process throughout general education and major. The final four (4) represent ways of knowing and are intended to expose students to ideas and engage them in a broad range of active learning experiences. The GEM competency areas are as listed:

    a. Written Communication
    b. Oral Communication
    c. Mathematical Ways of Knowing
    d. Scientific Ways of Knowing
    e. Humanistic and Artistic Ways of Knowing
    f. Social and Behavioral Ways of Knowing

4. GEM courses in each area shall include the following competencies:

    a. Written Communication
    Upon completion of a course in this category, students are able to demonstrate the following competencies:

        i. Use flexible writing process strategies to generate, develop, revise, proofread, and edit texts.
        ii. Adopt strategies and genre appropriate to the rhetorical situation.
        iii. Use inquiry-based strategies to conduct research that explores multiple and diverse ideas and perspectives, appropriate to the rhetorical context.
        iv. Use rhetorically appropriate strategies to evaluate, represent, and respond to the ideas and research of others.
        v. Address readers' biases and assumptions with well-developed evidence-based reasoning.
        vi. Use appropriate conventions for integrating, citing, and documenting source material.
        vii. Read, interpret, and communicate key concepts in writing and rhetoric.

    b. Oral Communication
    Upon completion of a course in this category, students are able to demonstrate the following competencies:

i. Research, discover, and develop information resources and structure spoken messages to increase knowledge and understanding.
ii. Research, discover, and develop evidence-based reasoning and persuasive appeals for ethically influencing attitudes, values, beliefs, or behaviors.
iii. Adapt spoken messages to the diverse personal, ideological, and emotional needs of individuals, groups, or contexts.
iv. Employ effective spoken and nonverbal behaviors that support communication goals and illustrate self-efficacy.
v. Listen in order to effectively and critically evaluate the reasoning, evidence, and communication strategies of self and others.
vi. Demonstrate knowledge of key theories, perspectives, principles, and concepts in the Communication discipline, as applied to oral communication.

c. Mathematical Ways of Knowing
Upon completion of a course in this category, a student is able to demonstrate the following competencies:

i. Interpret mathematical concepts.
ii. Represent information/data.
iii. Use appropriate strategies/procedures when solving mathematical problems.
iv. Draw reasonable conclusions based on quantitative information.

d. Scientific Ways of Knowing
Upon completion of a non-lab course in this category, a student is able to demonstrate competencies i-iv. A student is able to demonstrate all five competencies, i-v, upon completion of a lab course.

i. Apply foundational knowledge and models of a discipline in the physical or natural sciences to analyze and/or predict phenomena.
ii. Apply scientific reasoning to critically evaluate assertions.
iii. Interpret and communicate scientific information via written, spoken and/or visual representations.
iv. Describe the relevance of specific scientific principles to the human experience.
v. Test a hypothesis in the laboratory or field using discipline-specific tools and techniques for observation, data collection and analysis to form a defensible conclusion.

e. Humanistic and Artistic Ways of Knowing
Upon completion of a course in this category, students are able to demonstrate at least five (5) of the following competencies:

i. Recognize and describe humanistic, historical, or artistic works within problems and patterns of the human experience.
ii. Distinguish and apply methodologies, approaches, or traditions specific to the discipline.

iii. Differentiate formal, conceptual, and technical elements specific to the discipline.
iv. Analyze, evaluate, and interpret texts, objects, events, or ideas in their cultural, intellectual or historical contexts.
v. Interpret artistic or humanistic works through the creation of art, language, or performance.
vi. Develop critical perspectives or arguments about the subject matter, grounded in evidence-based analysis.
vii. Demonstrate self-reflection, widened perspective, and respect for diverse viewpoints.

f. Social and Behavioral Ways of Knowing
Upon completion of a course in this category, students are able to demonstrate all five (5) of the following competencies.

i. Demonstrate knowledge of the theoretical and conceptual frameworks of a particular Social Science discipline.
ii. Describe self and the world by examining the dynamic interaction of individuals, groups, and societies as they shape and are shaped by history, culture, institutions, and ideas.
iii. Utilize Social Science approaches, such as research methods, inquiry, or problem-solving, to examine the variety of perspectives about human experiences.
iv. Evaluate how reasoning, history, or culture informs and guides individual, civic, or global decisions.
v. Identify the impact of the similarities and differences among and between individuals, cultures, or societies across space and time.

5. General Education Requirements

a. This subsection applies to Associate of Arts, Associate of Science, and Baccalaureate degrees. For the purpose of this policy, disciplines are indicated by course prefixes.

General education curricula must reflect the following credit distribution:

Competency Area	**Minimum Credits**
Written Communication	6
Oral Communication	3~~2~~
Mathematical Ways of Knowing	3
Scientific Ways of Knowing	7 (from two different disciplines with at least one laboratory or field experience)
Humanistic and Artistic Ways of Knowing	6 (from two different disciplines)
Social and Behavioral Ways of Knowing	6 (from two different disciplines)
Institutionally-Designated Credits	5~~6~~

i. GEM courses are designed to be broadly accessible to students regardless of major, thus college-level and non-GEM pre-requisites to GEM courses should be avoided unless deemed necessary by the institution.

ii. Additional GEM courses, beyond the general education curricula, may be required within the major for degree completion.

b. This subsection pertains to Associate of Applied Science (AAS) degrees.

The general education curricula for the AAS degree must contain a minimum of fifteen (15) credits, so distributed in the following areas:

Competency Area	Minimum Credits
Written Communication	3
Oral Communication	3
Mathematical Ways of Knowing	3
Social and Behavioral Ways of Knowing	3
Any general education course including institutionally designated courses	3

c. GEM courses and institutionally designated courses shall transfer as meeting an associated general education competency requirement at any institution pursuant to Board policy Section III.V.

6. Governance of the General Education Program and Review of Courses

a. GEM courses are developed by faculty and approved via the curriculum approval process of the institution delivering the courses. Faculty discipline groups representing all institutions shall meet at least annually or as directed by the Board, to ensure consistency and relevance of general education competencies and courses approved for their respective GEM competency areas.

b. Common Course Indexing is developed for courses offered within the GEM framework to provide greater transparency and seamlessness within transfer processes at Idaho's postsecondary institutions. Common-indexed courses are accepted as direct equivalents across institutions for transfer purposes. Common course indexing shall include common course prefix, common course number, common course title, and common GEM discipline area designation. The common course number shall be three digits in sequence, but can be preceded by a single digit if four numbers are utilized by the institution (x###).

The common course list shall be approved by the Board on an annual basis and shall be maintained by the Board office. Changes to the list may be proposed by faculty discipline groups to the General Education Matriculation Committee. Proposed additions or removal of courses on the common course list must be reviewed by the General Education Matriculation Committee prior to Board

approval. The request to remove a common-indexed course from an institution's academic catalog must be approved by the Board. The request to discontinue a course must be submitted in writing by the institution to the Board office. The request shall be submitted no less than a year in advance and provide rationale for the inability to offer the course.

c. The General Education Matriculation (GEM) Committee shall consist of a Board-appointed representative from each of the institutions, from the Division of Career Technical Education, from the Idaho Registrars Council, from the digital learning community, from the dual credit community, from the open education community; and the Executive Director of the Board, or designee, who shall serve as the chair of the committee. To ensure alignment with AAC&U Essential Learning Outcomes and subsection 1, the Committee shall meet at least annually to review the competencies and rubrics of the general education framework. The Committee shall make recommendations to the Board regarding the general education framework and the common course list. The Committee shall review and make recommendations on the general education competencies as necessary. GEM Committee duties are prescribed by the Board, including those that may involve addressing issues related to competency areas and course offerings. The GEM Committee reports to the Council on Academic Affairs and Programs.

d. The institutions shall identify all general education courses in their curricula and identify them in a manner that is easily accessible by the public via their respective websites, as well as relevant web resources maintained by the Board office.

SUBJECT

Board Policy III.E. Certificates and Degrees – Second Reading

REFERENCE

December 2013	Board approved first reading of amendments to Board Policy III.E that included updates to definitions for technical certificates and credit hour.
February 2014	Board approved the second reading of amendments to Board Policy III.E.
June 2018	Board approved the first reading of amendments to Board Policy III.E and asked staff to provide a definition of an applied baccalaureate degree, separate from the academic baccalaureate degree.
February 2019	Board approved another first reading of amendments to Board Policy III.E due to changes between readings. This included a definition of an applied baccalaureate degree and a definition of micro-certifications.
April 2019	Board approved second reading of amendments to Board Policy III.E.
June 2020	Board approved the first reading of amendments to Board Policy III.E that added a definition of a specialized certificate.
August 2020	Board approved the second reading of amendments to Board Policy III.E.
October 2022	Board approved the first reading of amendments to Board Policy III.E. that revised the definition of microcredentials, updated several other definitions, and removed the advanced associate of applied science (AAS) degree.

APPLICABLE STATUTES, RULE OR POLICY

Idaho State Board of Education Governing Policies & Procedures, Section III.E.

BACKGROUND/DISCUSSION

Board Policy III.E. provides definitions for approved certificates and degrees, including credit requirements for career technical education programs and academic programs. A brief summary of proposed amendments to this policy are included here:

- Change definition of micro-certification to microcredential and break down the definition to differentiate between a stacked microcredential and a digital badge.
- Provide that microcredentials will be tracked and maintained through a platform approved by the Division of Career Technical Education. Currently this is SkillStack.

- Update definitions of academic undergraduate and graduate certificates to clarify that these certificates can be stand-alone or attached to an undergraduate or graduate degree, respectively.
- Reorganize the definition of technical certificates with one main definition to differentiate between basic, intermediate, and advanced technical certificates by a range of credits required for each.
- Remove the advanced associate of applied science (AAS) degree.
- Clarify that institutions may not confer honorary degrees on staff of the Office of the State Board of Education (OSBE).

IMPACT

The proposed amendments will provide institutions with guidance for the development of microcredentials and specialized certificates and will assist with distinguishing the differences between the technical certificates. Proposed amendments will require institutions offering technical certificates to reevaluate existing offerings to ensure those align with the new definition. Finally, proposed amendments will allow institutions to confer honorary degrees on employees of the Board who are not OSBE staff.

ATTACHMENTS

Attachment 1 – Board Policy III.E. Certificates and Degrees – Second Reading

STAFF COMMENTS AND RECOMMENDATIONS

There were no amendments between the first and second readings. Board staff recommends approval.

BOARD ACTION

I move to approve the second reading of proposed amendments to Board Policy III.E. Certificates and Degrees as submitted in Attachment 1.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

ATTACHMENT 1

Idaho State Board of Education
GOVERNING POLICIES AND PROCEDURES
SECTION: III. POSTSECONDARY AFFAIRS
SUBSECTION: E. Certificates and Degrees ~~August 2020~~ December 2022

1. Definitions

Programs of instruction require specified numbers of credits earned through educational work on the part of students. Completion of the program of instruction results in the awarding of a certificate to or conferring of a degree upon the student by the faculty and the Chief Executive Officer. The following definitions have been approved by the Board:

a. MICROCREDENTIALS
Credentials awarded for mastery of defined skills or concepts, including career technical and academic skills. Microcredentials reflect skills, knowledge, and abilities gained in increments and measured by identified outcomes that are equal to or less than a single course of study but may also build upon or complement each other, resulting in a stacked microcredential. Microcredentials are most often distributed as digital badges.

i. Stacked ~~m~~Microcredential
A set of organized microcredentials that an individual can earn after meeting specific outcomes. Completion of stacked microcredentials may result in credit through institutions' prior learning assessment policies.

ii. Digital Badge
A visual representation of one or more microcredentials. Digital badges, in compliance with standards recognized by the Division of Career Technical Education, are embedded with metadata that are verifiable and portable.

b. CERTIFICATES

i. Academic Certificate of Completion
A credential awarded for completion of a coherent program of study consisting of one (1) to six (6) semester credits ~~or less~~, representing a coherent body of knowledge that does not lead to an academic undergraduate certificate or a degree.

ii. Academic Undergraduate Certificate
A credential awarded for completion of a coherent program of study consisting of ~~-~~seven (7) semester credits or more, representing a coherent body of knowledge that may lead to an academic degree. Academic undergraduate certificates may be earned as standalone certificates or attached to an undergraduate degree.

iii. Graduate Certificate
A credential awarded for completion of a coherent program of study consisting of nine (9) or more semester credits of graduate course work, representing a coherent body of knowledge that may lead to a degree or may be unique and standalone. Graduate certificates may be earned as standalone certificates or attached to a graduate degree.

~~iv. Technical Certificate of Completion~~
~~A career technical credential awarded by the institution consisting of seven (7) semester credits or less that represents mastery of a defined set of competencies.~~

~~v. Basic Technical Certificate~~
~~A credential awarded for completion of requirements in an approved career technical program of at least eight (8) semester credit hours and represents mastery of a defined set of competencies.~~

~~vi. Intermediate Technical Certificate~~
~~A credential awarded for the completion of requirements in an approved career technical program of at least 30 semester credit hours and represents mastery of a defined set of competencies.~~

~~vii. Advanced Technical Certificate~~
~~A credential awarded for completion of requirements in an approved career technical program of at least 52 semester credit and represents mastery of a defined set of competencies.~~

iv. Technical Certificate
A credential awarded for completion of requirements in an approved career technical program that represents mastery of a defined set of competencies. Technical certificates are awarded based on a total number of required credits and intended to be stackable:

1) Technical Certificate of Completion – 1 to 7 credits
2) Basic Technical Certificate – 8 to 29 credits
3) Intermediate Technical Certificate – 30 to 51 credits
4) Advanced Technical Certificate – 52 to 59 credits

~~viii. Microcertification~~
~~A credential in a narrowly focused area within career technical program or academic program that confirms mastery through a formal assessment of a specific industry-related skillset or topic. Completion of multiple microcertification courses may lead to a certificate.~~

~~ix~~v. Specialized Certificate
A credential awarded upon successful completion of specific credit-bearing courses within a career technical or academic program of fewer than 60 semester credits that have been industry validated and sequenced for the

purpose of developing new skills and~~/or~~ upgrading existing skills in an occupation. Specialized certificates are to be stacked on or appended to other credentials as advanced training. In exceptional cases, stand-alone Specialized Certificates may be proposed if justified by the content of the certificate.

~~b~~c. ASSOCIATE OF APPLIED SCIENCE DEGREE: A credential awarded for completion of requirements in an approved career technical program of at least 60 semester credits (includes a minimum of 15 general education credits) and represents mastery of a defined set of competencies. ~~An Advanced option may be awarded for additional credits of at least 15 credit hours that are beyond the A.A.S. degree.~~

~~c~~d. ASSOCIATE DEGREE: A credential awarded for completion of requirements entailing the equivalent of at least 60 semester credits of academic work. An Associate Degree shall not require more than 60 semester credits unless necessary for matriculation to a specific baccalaureate program or for unique accreditation, certification, or professional licensure purposes or by exception approved by the Board.

~~d~~e. BACCALAUREATE DEGREE: A credential awarded for completion of requirements entailing the equivalent of at least 120 semester credits of academic work. A baccalaureate degree shall not require more than 120 semester credits unless needed for unique accreditation, certification, professional licensure purposes, or by exception approved by the Board.

~~e~~f. APPLIED BACCALAUREATE DEGREE: A credential awarded for completion of requirements entailing the equivalent of at least 120 semester credits of academic and career technical coursework (includes a minimum of 36 general education credits). An applied baccalaureate degree shall not require more than 120 semester credits unless needed for unique accreditation, certification, or professional licensure purposes or by exception approved by the Board.

~~f~~g. GRADUATE DEGREES: A credential awarded for completion of academic work beyond the baccalaureate degree, including any required research. Graduate degrees consist of master's degrees, specialist degrees, and doctoral degrees.

2. Academic and Career Technical Credit Hour Requirements

A credit hour is an amount of work represented in intended learning outcomes and verified by evidence of student achievement that is an institutionally established equivalency that reasonably approximates not less than:

a. One (1) hour of classroom or direct faculty instruction and a minimum of two hours of out-of-class student work each week for approximately fifteen weeks for one semester hour of credit, or ten to twelve weeks for one quarter hour of credit, or the

equivalent amount of work over a different amount of time; or

b. At least an equivalent amount of work as required in paragraph (a) of this definition for other academic activities as established by the institution, including laboratory work, internships, practica, studio work, and other academic work leading to the award of credit hours.

3. Requirements for Certificates and Degrees

A postsecondary institution ~~will~~ has authority to establish the number of earned credits required for each certificate and degree. The requirements may differ from the general requirements specified in the definitions in subsection 1; however, all credit requirements must receive Board approval in accordance with the program approval policies provided in Board Policy III.G. Institutional catalogs ~~will~~shall specify the required number of earned credits for each certificate ~~or~~ and degree.

4. Authorization Required

Programs offered at the institution, as well as the certificates and degrees to which they lead, are subject to review and approval in accordance with the program approval policies provided in Board Policy III.G. A certificate or degree conferred upon the student is conferred under the authority of the Board.

5. Authorized Microcredentials, Certificates, and Degrees

A current listing of authorized certificates and degrees awarded by each institution is maintained at the institution by the Chief Executive Officer and for all institutions at the Office of the State Board of Education. All microcredentials shall be tracked as digital badges through a platform approved and maintained by the Division of Career Technical Education.

6. Honorary Degrees

Each institution may award honorary degrees, not to exceed the highest level of Board-authorized degrees currently awarded by the institution, to persons in recognition of distinguished achievements at the local, state, or national level in areas such as education, public service, research, sciences, humanities, business, or other professions. The award of an honorary degree must receive the prior approval of the Chief Executive Officer upon recommendation by the faculty.

Each institution will develop its own procedures for seeking nominations for and selecting honorary degree recipients. Those procedures may include a statement of eligibility requirements for honorary degrees. However, no person who is currently employed by the institution, is a member of the Board, is~~or the Board's~~ staff of the Office of the State Board of Education, or is an incumbent elected official is eligible for an honorary degree during the term of employment, appointment, or office.

SUBJECT

Board Policy III.Z, Planning and Delivery of Postsecondary Programs and Courses – Second Reading

REFERENCE

October 20, 2016	The Board approved the first reading of the proposed amendments to Board Policy III.Z., updating institutions' statewide program responsibilities.
December 15, 2016	The Board approved the second reading of proposed amendments to Board Policy III.Z.
December 21, 2017	The Board approved the first reading of proposed amendments to Board Policy III.Z., changing the planning timeframe from five years to three years.
February 15, 2018	The Board approved the second reading of proposed amendments to Board Policy III.Z.
June 21, 2018	The Board approved the first reading of proposed amendments to Board Policy III.Z., adding responsibilities for applied baccalaureate degrees to each region.
August 16, 2018	The Board approved the second reading of proposed amendments to Board Policy III.Z.
June 10, 2020	The Board approved the first reading of proposed amendments to Board Policy III.Z., changing the name of a statewide program listed for the University of Idaho.
August 26, 2020	The Board approved the second reading of proposed amendments to Board Policy III.Z.
February 18, 2021	The Board approved the first reading of proposed amendments to Board Policy III.Z that added new definitions for high-demand programs and joint programs.
April 22, 2021	The Board approved the second reading of proposed amendments to Board Policy III.Z.
October, 2022	The Board approved the first reading of proposed amendments to Board Policy III.Z. that described a set of minimum criteria by which the Board will evaluate proposals by the universities to offer new associate degrees and proposals by the community colleges to offer baccalaureate degrees.

APPLICABLE STATUTE, RULE, OR POLICY

Idaho State Board of Education Governing Policies and Procedures, Section III.Z. and Section III.G.
Section 33-113, Idaho Code
Section 33-2107A, Idaho Code

BACKGROUND/DISCUSSION

The purpose of Board Policy III.Z, "is to ensure Idaho's public postsecondary institutions meet the educational and workforce needs of the state through academic planning, alignment of programs and courses, and collaboration and coordination." The purpose is to also meet the statutory requirement to "as far as practicable prevent wasteful duplication of effort" by the institutions.

In spring 2022, the University of Idaho submitted a proposal to the Board requesting approval to offer several associate degrees. In addition, in 2021, several community colleges included bachelor's degrees on their three-year plans. Board members proposed as set of criteria to evaluate these types of requests and asked Board staff to work with the institutions to develop policy language to codify these criteria.

IMPACT

Proposed amendments describe a set of five minimum criteria by which the Board will evaluate proposals by the universities to offer new associate degrees and proposals by the community colleges to offer baccalaureate degrees.

ATTACHMENTS

Attachment 1 – Board Policy III.Z. Planning and Delivery of Postsecondary Programs and Courses – Second Reading

STAFF COMMENTS AND RECOMMENDATIONS

There were no amendments between the first and second readings. Board staff recommends approval.

BOARD ACTION

I move to approve the second reading of proposed amendments to Board Policy III. Z. Planning and Delivery of Postsecondary Education Programs and Courses as submitted in Attachment 1.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

ATTACHMENT 1

Idaho State Board of Education
GOVERNING POLICIES AND PROCEDURES
SECTION: III. POSTSECONDARY AFFAIRS
Subsection: Z. Planning and Delivery of Postsecondary Programs and Courses
~~April 2021~~December 2022

The purpose of this policy is to ensure Idaho's public postsecondary institutions meet the educational and workforce needs of the state through academic planning, alignment of programs and courses (hereinafter referred to collectively as "programs"), and collaboration and coordination. This subsection shall apply to the University of Idaho, Boise State University, Idaho State University, Lewis-Clark State College, College of Eastern Idaho, College of Southern Idaho, College of Western Idaho, and North Idaho College (hereinafter "institutions"). The State Board of Education (the Board) aims to optimize the delivery of academic programs while allowing institutions to grow and develop consistent with their vision and mission with an appropriate alignment of strengths and sharing of resources.

This policy requires the preparation and submission of academic plans to advise and inform the Board in its planning and coordination of educational programs in a manner that enhances access to quality programs, while concurrently increasing efficiency, avoiding unnecessary duplication and maximizing the cost-effective use of educational resources through coordination between institutions. As part of this process, the Board hereby identifies and reinforces the responsibilities of the institutions governed by the Board to deliver Statewide Programs. The provisions set forth herein serve as fundamental principles underlying the planning and delivery of programs pursuant to each institution's assigned Statewide and Service Region Program Responsibilities. These provisions also require collaborative and cooperative agreements, or memorandums of understanding, between and among the institutions.

This policy is applicable to campus-based face-to-face programs, including those that use technology to facilitate and/or supplement a physical classroom experience. It also applies to hybrid and blended programs where a substantial portion of the content is delivered on-line and typically has reduced seat time.

1. Definitions

   a. Designated Institution shall mean an institution whose main campus is located in a service region as identified in subsection 2.b.ii.1) and 2) below; and which possesses the first right to offer programs within its designated service region(s).

      i. With respect to academic programs, Designated Institutions and Partnering Institutions shall have Service Region Program Responsibility for those regions identified in subsection 2.b.ii.1).

      ii. With respect to career technical programs, Designated Institutions and Partnering Institutions shall include only the College of Southern Idaho, College of Western Idaho, North Idaho College, College of Eastern Idaho, Lewis-Clark

State College, and Idaho State University and shall have Service Region Program Responsibility for those regions identified in subsection 2.b.ii.2).

b. A memorandum of understanding (MOU) is an agreement between two or more institutions offering duplicative programs within the same service region that details how such programs will be delivered in a collaborative manner. An MOU is intended to provide specific, practical details that build upon what has been provided in each Institution's Plan.

c. High-Need Program shall mean a program identified by an institution or the Board as critical to supporting the future growth of a profession.

d. Joint Program shall mean an educational program jointly developed and delivered concurrently by two or more institutions.

e. Partnering Institution shall mean either
   i. an institution whose main campus is located outside of a Designated Institution's identified service region but which, pursuant to a Memorandum of Understanding, offers Regional Programs in the Designated Institution's primary service region, or
   ii. an institution not assigned a Statewide Program Responsibility which, pursuant to a Memorandum of Understanding with the institution assigned the Statewide Program Responsibility, offers and delivers a statewide educational program.

f. Service Region Program shall mean an educational program identified by the Board to be delivered by a Designated Institution within its respective service region that meets regional educational and workforce needs.

g. Service Region Program Responsibility shall mean an institution's responsibility to offer and deliver a Service Region Program to meet regional educational and workforce needs in its primary service region as defined in subsection 2.b.ii.1) and 2) below. Service Region Program Responsibilities are assigned to the Designated Institution in each service region, but may be offered and delivered by Partnering Institutions in accordance with the procedures outlined in this policy.

h. Statewide Program shall mean an educational program identified by the Board to be delivered by a particular institution which meets statewide educational and workforce needs. Lewis-Clark State College, College of Eastern Idaho, North Idaho College, College of Southern Idaho, and College of Western Idaho do not have Statewide Program Responsibilities.

i. Statewide Program Responsibility shall mean an institution's responsibility to offer and deliver a Statewide Program in all regions of the state. Statewide Program Responsibilities are assigned to a specific institution by the Board, taking into account the degree to which such program is uniquely provided by the institution.

2. Planning and Delivery Process and Requirements

a. Planning

i. Three-Year Plan

The Board staff shall, using the Institution Plans submitted, create and maintain a rolling three (3) year academic plan (Three-Year Plan) which includes all current and proposed institution programs. The Three-Year Plan shall be approved by the Board annually at its August Board meeting.

ii. Institution Plan

Each institution shall, in accordance with a template to be developed by the Board's Executive Director or designee, create and submit to Board staff a rolling three (3) year academic plan, to be updated annually, that describes all current and proposed programs and services to be offered in alignment with each institution's Statewide and Service Region Program Responsibilities (the Institution Plan). Institution Plans shall be developed pursuant to a process of collaboration and communication with the other institutions in the state.

1) Statewide Programs

Institutions assigned a Statewide Program Responsibility shall plan for and determine the best means to deliver such program. Each institution assigned a Statewide Program Responsibility shall include in its Institution Plan all currently offered and proposed programs necessary to respond to the workforce and educational needs of the state relating to such Statewide Program Responsibilities. Each Institution Plan shall include the following information for proposed Statewide programs:

a) A description of the Statewide Programs to be delivered throughout the state and the anticipated resources to be employed.

b) A description of the Statewide Programs to be offered by a Designated or Partnering Institution.

c) A summary of the Memoranda of Understanding (MOUs), if any, to be entered into with Partnering Institutions pursuant to Subsection 2.b.iii. below.

2) Service Region Programs

It is the responsibility of the Designated Institution to plan for and determine the best means to deliver Service Region Programs that respond to the educational and workforce needs of its service region. If, in the course of developing or updating its Institution Plan, the Designated Institution identifies a need for the delivery of a program within its service region, and

the Designated Institution is unable to provide the program, then the Designated Institution shall coordinate with a Partnering Institution (including institutions with Statewide Program Responsibilities if applicable) located outside of the service region to deliver the program in the service region.

The Institution Plan developed by a Designated Institution shall include the following:

a) A description of the proposed academic programs to be delivered in the service region, or outside of the service region, by the Designated Institution and the anticipated resources to be employed.

b) A description of proposed programs to be offered in the service region by Partnering Institutions, including any anticipated transition of programs to the Designated Institution.

c) A description of proposed Statewide Programs to be offered in the service region by an institution with Statewide Program Responsibilities, or by the Designated Institution in coordination with the institution holding the Statewide Program Responsibility.

d) A summary of proposed MOU's, if any, to be entered into between the Designated Institution and any Partnering Institutions in accordance with Subsection 2.b.iii. below.

e) A summary of collaborative programs created to meet areas designated as high-need.

3) Institution Plan Updates

Institution Plans shall be updated and submitted to Board staff annually as follows:

a) Preliminary Institution Plans shall be developed according to a template provided by the Board's Executive Director or designee and submitted to the Council for Academic Affairs and Programs (CAAP) for review, discussion and coordination annually in April.

b) Following review by CAAP, Institution Plans shall be submitted to Board staff. Upon submission of the Institution Plans to Board staff, the Board's Executive Director or designee shall review the Institution Plans for the purpose of optimizing collaboration and coordination among institutions, ensuring efficient use of resources, and avoiding unnecessary duplication of programs.

c) In the event the Board's Executive Director or designee recommends material changes, he/she shall work with the institutions and then submit

those recommendations to CAAP for discussion prior to submission to the Board for inclusion in the Three-Year Plan.

d) The Board's Executive Director or designee shall then provide their recommendations to the Board for enhancements, if any, to the Institution Plans at a subsequent Board meeting. The Board shall approve the Institution Plans annually through the Three-Year Plan submitted by Board staff. Board approval of Institution Plans acts as a roadmap for institutional planning and does not constitute Board approval of a program. Institutions are still required to follow the standard program approval process as identified in Board Policy Section III.G to gain program approval.

b. Delivery of Programs

i. Statewide Program Delivery
The Board has established statewide program responsibilities for the University of Idaho, Boise State University, and Idaho State University. Each institution must assess the need for, and when determined by the assessment, ensure the statewide delivery of educational programs assigned by the Board. A statewide program list consisting of statewide program responsibilities shall be updated by the Board every two years in accordance with a schedule developed by the Executive Director or designee. The program list will be contained in the Board approved three-year plan document and maintained by Board staff.

ii. High-Demand Programs
The Board recognizes that the need for high-demand, high-need programs may require joint delivery by multiple institutions statewide. These high-demand programs must be delivered through collaboration between institutions in order to preserve rural and statewide access. Service region restrictions and primary institution first rights to offer a program do not apply to Board identified high-demand programs. Criteria for statewide program high-demand designation includes, but is not limited to:

1) Idaho Department of Labor data,
2) Idaho industry demand as demonstrated by unfilled positions and industry data,
3) Demonstrated Idaho state needs for programs supporting underserved populations, and
4) Requested by the Board.

An institution wishing to offer a high-demand program that does not have statewide responsibility in the program area must meet the criteria above, have a signed MOU with the Institution with the Statewide Program Responsibility, and the approval of the Board's Executive Director or designee. At that point, the Partnering Institution shall include the program in its Institution Plan. If the

Board determines that an emergency need exists for a program that the Institution with Statewide Program Responsibility cannot meet, then upon Board approval the two Institutions shall enter into an MOU for the delivery of such program.

iii. Service Region Program Delivery

The Board has established service regions for the institutions based on the six geographic areas identified in Section 33-2101, Idaho Code. A Designated Institution shall have the Service Region Program Responsibility to assess and ensure the delivery of all educational programs and services necessary to meet the educational and workforce needs within its assigned service region.

1) Academic Service Regions

Region I shall include the area within Area No.1 under Section 33-2101, Idaho Code. Lewis-Clark State College, the University of Idaho, and North Idaho College are the Designated Institutions serving undergraduate needs. The University of Idaho is the Designated Institution serving the graduate education needs. Lewis-Clark State College, and North Idaho College are the Designated Institutions serving applied baccalaureate degree needs.

Region II shall include the area within Area No.2 under Section 33-2101, Idaho Code. Lewis-Clark State College and the University of Idaho are the Designated Institutions serving undergraduate needs. The University of Idaho is the Designated Institution serving the graduate education needs.

Region III shall include the area within Area No.3 under Section 33-2101, Idaho Code. Boise State University and College of Western Idaho are the Designated Institutions serving undergraduate needs. Boise State University is the Designated Institution serving graduate education needs. Boise State University and College of Western Idaho are the Designated Institutions serving applied baccalaureate degree needs.

Region IV shall include the area within Area No.4 under Section 33-2101, Idaho Code. Idaho State University and College of Southern Idaho are the Designated Institutions serving undergraduate needs. Idaho State University is the Designated Institution serving the graduate education needs, with the exception that Boise State University will meet undergraduate and graduate business program needs. Idaho State University and College of Southern Idaho are the Designated Institutions serving applied baccalaureate degree needs.

Region V shall include the area within Area No.5 under Section 33-2101, Idaho Code. Idaho State University is the Designated Institution serving undergraduate and graduate education needs.

Region VI shall include the area within Area No.6 under Section 33-2101, Idaho Code. Idaho State University and College of Eastern Idaho are the Designated Institutions serving undergraduate education needs. Idaho State University is the Designated Institution serving the graduate education needs. Idaho State University and College of Eastern Idaho are the Designated Institutions serving applied baccalaureate degree needs.

2) Career Technical Service Regions

Postsecondary career technical education is delivered by six (6) institutions, each having responsibility for serving one of the six geographic areas identified in Section 33-2101.

Region I shall include the area within Area No.1 under Section 33-2101, Idaho Code. North Idaho College is the Designated Institution.

Region II shall include the area within Area No.2 under Section 33-2101, Idaho Code. Lewis-Clark State College is the Designated Institution.

Region III shall include the area within Area No.3 under Section 33-2101, Idaho Code. College of Western Idaho is the Designated Institution

Region IV shall include the area within Area No.4 under Section 33-2101, Idaho Code. College of Southern Idaho is the Designated Institution.

Region V shall include the area within Area No.5 under Section 33-2101, Idaho Code. Idaho State University is the Designated Institution.

Region VI shall include the area within Area No.6 under Section 33-2101, Idaho Code. College of Eastern Idaho is the Designated Institution.

3) Program Offerings by Partnering Institutions

If a Partnering Institution (other than an institution with Statewide Program Responsibilities) identifies a Service Region Program not identified, or anticipated to be identified, in a Designated Institution's Plan, and the Partnering Institution wishes to offer such program in the Designated Institution's service region, then the Partnering Institution may communicate with the Designated Institution for the purpose of allowing the Partnering Institution to deliver such program in the service region and to include the program in the Designated Institution's Plan. In order to include the program in the Designated Institution's Plan, the Partnering Institution must demonstrate the need within the service region for delivery of the program, as determined by the Board (or by the Administrator of the Division of Career Technical Education in the case of career technical level programs). In order to demonstrate the need for the delivery of a program in a service region, the Partnering Institution shall complete and submit to the Chief Academic Officer of the Designated Institution, to CAAP and to Board staff,

in accordance with a schedule to be developed by the Board's Executive Director or designee, the following:

a) A study of business and workforce trends in the service region indicating anticipated, ongoing demand for the educational program to be provided.

b) A survey of potential students evidencing demand by prospective students and attendance sufficient to justify the short-term and long-term costs of delivery of such program.

c) A complete description of the program requested to be delivered, including a plan for the delivery of the program, a timeline for delivery of the program, the anticipated costs of delivery, the resources and support required for delivery (including facilities needs and costs), and program syllabuses.

iv. Associate Degrees at Universities and Baccalaureate Degrees at Community Colleges

When a university proposes to offer an associate degree or a community college proposes to offer a baccalaureate degree, the Board will evaluate the proposed degree using at least the following criteria:

1) Demand

Proposed offerings must be to meet an urgent, local need based on where students who complete the offering will be employed rather than on where the students reside. The demand for the proposed offering needs to be clear, urgent, and compelling, as evidenced through data and industry input. Commitments of practical support (e.g. funding, internships, etc.) from industry stakeholders constitutes evidence of demand.

2) Specialization

The proposed offering must be based on the unique capability at the institution, founded on specialized instructional expertise and any infrastructure necessary for program delivery.

3) Non-Competitiveness

The proposed offering must be non-competitive with other institutions' offerings within the identified service area (whether regional or statewide) and supported by other institutions within the service area. The Executive Director or designee may request written commitments from the presidents of other institutions within the service area expressing conceptual and, if necessary, practical support for the proposed program.

4) Collaboration

Alternative approaches to meeting the identified demand addressed by the proposed offering should be fully considered, including potential collaboration with other institutions. High-demand programs must be offered through inter-institutional collaboration as described in this policy.

5) Resources

The institution must have sufficient resources to develop and deliver the proposed offering.

These criteria do not apply to Associate Degrees in General Studies currently offered or proposed to be offered by the universities.

~~iv.~~v. Memoranda of Understanding

The Board encourages and fosters orderly and productive collaboration between Idaho's public institutions. Memoranda of Understanding can support such collaboration.

Institutions proposing to offer a joint program shall develop an MOU to identify the specific roles of each participating institution; the student-related processes associated with delivery of the program; and a timeline for review.

When an institution desires to offer a program already being offered by another institution in the latter institution's service region, an MOU shall be developed between the institutions to offer the program.

If a Designated Institution has identified a workforce or educational need for the delivery of a program within its service region and is unable to provide the program, the Designated Institution may collaborate with a Partnering Institution to offer the program. An MOU will not be required for review or approval prior to implementation in this case. Institutions are required to follow the standard program approval processes as identified in Board Policy III.G to obtain program approval.

An institution with Statewide Program Responsibility need not enter into an MOU with any other institutions before offering the statewide program in service regions outside the service region of the institution with Statewide Program Responsibility. If an institution desires to offer a program for which another institution has Statewide Program Responsibility, the institution that does not have Statewide Program Responsibility shall be required to enter into an MOU with the institution that has Statewide Program Responsibility for that program.

When an institution with Statewide Program Responsibility or Service Region

Program Responsibility desires to offer a program within a service region where such program is currently being offered by another institution, the institutions shall enter into a transition MOU that includes an admissions plan between the institutions providing for continuity in student enrollment during the transition period.

Idaho public postsecondary institutions may enter into MOUs with out-of-state postsecondary institutions or private postsecondary institutions to offer programs. Such MOUs do not require notification or approval by the Board, but shall be shared with the Council on Academic Affairs and Programs. While the Board does not prohibit MOUs with out-of-state postsecondary institutions, agreements with in-state public institutions are preferred.

Articulation agreements between any postsecondary institutions for the purposes of facilitating course or program transfer do not require approval by the Board. Such agreements shall be managed and tracked by the institutions, and shall be reported to the Board on an annual basis as part of the three-year planning process. All articulation agreements must be in compliance with Section 33-3729, Idaho Code, and Board Policy III.V.

All MOUs shall be submitted in conjunction with related program proposals following the standard program approval processes as identified in Board Policy III.G.

~~v.~~vi. Facilities

For programs offered by a Partnering Institution (whether an institution with Statewide Program Responsibilities, or otherwise) within a municipal or metropolitan area that encompasses the campus of a Designated Institution, the Partnering Institution's programs offerings shall be conducted in facilities located on the campus of the Designated Institution to the extent the Designated Institution is able to provide adequate and appropriate property or facilities (taking into account financial resources and programmatic considerations), or in facilities immediately adjacent to the campus of the Designated Institution. Renting or building additional facilities shall be allowed only upon Board approval, based on the following:

1) The educational and workforce needs of the local community demand a separate facility at a location other than the campus of the Designated Institution or adjacent thereto as demonstrated in a manner similar to that set forth in Subsection 2.b.ii.1) above, and

2) The use or development of such facilities are not inconsistent with the Designated Institution's Plan.

Facilities rented or built by a Partnering Institution (whether an institution with Statewide Program Responsibilities, or otherwise) on, or immediately adjacent to, the "main" campus of a Designated Institution may be identified (by name)

as a facility of the Partnering Institution, or, if the facility is rented or built jointly by such institutions, as the joint facility of the Partnering Institution and the Designated Institution. Otherwise, facilities utilized and programs offered by one or more Partnering Institutions within a service region shall be designated as "University Place at (name of municipality)."

For programs offered by a Partnering Institution (whether an institution with Statewide Program Responsibilities, or otherwise) within a municipality or metropolitan area encompassing a campus of a Designated Institution, to the extent programmatically possible, auxiliary services (including, but not limited to, bookstore, conference and other auxiliary enterprise services) and student services (including, but not limited to, library, information technology, and other auxiliary student services) shall be provided by the Designated Institution. To the extent programmatically appropriate, registration services shall also be provided by the Designated Institution. It is the goal of the Board that a uniform system of registration ultimately be developed for all institutions governed by the Board. The Designated Institution shall offer these services to students who are enrolled in programs offered by the Partnering Institution in the same manner, or at an increased level of service, where appropriate, as such services are offered to the Designated Institution's students. An MOU between the Designated Institution and the Partnering Institution shall outline how costs for these services will be allocated.

~~vi.~~vii. Duplication of Courses

If courses necessary to complete a Statewide Program are offered by the Designated Institution, they shall be used and articulated into the Statewide Program.

~~vii.~~viii. Discontinuance of Programs

Unless otherwise agreed between the applicable institutions pursuant to an MOU, if, for any reason, (i) a Designated Institution offering programs in its service region that supports a Statewide Program of another institution, (ii) a Partnering Institution offering programs in the service region of a Designated Institution, or (iii) an institution holding a Statewide Program Responsibility offering Statewide Programs in the service region of a Designated Institution, wishes to discontinue offering such program(s), it shall use its best efforts to provide the institution with Statewide or Service Region Program Responsibility, as appropriate, at least one (1) year's written notice of withdrawal, and shall also submit the same written notice to the Board and to oversight and advisory councils. In such case, the institution with Statewide or Service Region Program Responsibilities shall carefully evaluate the workforce need associated with such program and determine whether it is appropriate to provide such program. In no event will the institution responsible for the delivery of a Statewide or Service Region Program be required to offer such program

(except as otherwise provided herein above).

3. Existing Programs

   Programs being offered by a Partnering Institution (whether an institution with Statewide Program Responsibilities, or otherwise) in a service region prior to July 1, 2003, may continue to be offered pursuant to an MOU between the Designated Institution and the Partnering Institution, subject to the transition and notice periods and requirements set forth above.

4. Oversight and Advisory Councils

   The Board acknowledges and supports the role of oversight and advisory councils to assist in coordinating, on an ongoing basis, the operational aspects of delivering programs among multiple institutions in a service region, including necessary resources and support and facility services, and the role of such councils in interacting and coordinating with local and regional advisory committees to address and communicate educational needs indicated by such committees. Such interactions and coordination, however, are subject to the terms of the MOU's entered into between the institutions and the policies set forth herein.

5. Resolutions

   All disputes relating to items addressed in this policy shall be forwarded to the Board's Executive Director or designee for review. The Board's Executive Director or designee shall prescribe the method for resolution. The Board's Executive Director or designee may forward disputes to CAAP and, if necessary, make recommendations regarding resolution to the Board. The Board will serve as the final arbiter of all disputes.

6. Exceptions

   a. This policy is not applicable to programs for which 90% or more of all activity is required or completed online, or dual credit courses for secondary education.

   b. This policy also does not apply to courses and programs specifically contracted to be offered to a private, corporate entity. However, in the event that an institution plans to contract with a private corporate entity (other than private entities in the business of providing educational programs and course) outside of their Service Region, the contracting institution shall notify the Designated Institutions in the Service Region and institutions with Statewide Program Responsibilities, as appropriate. If the corporate entity is located in a municipality that encompasses the campus of a Designated Institution, the Board encourages the contracting institution to include and draw upon the resources of the Designated Institution insomuch as is possible.

SUBJECT

Open Educational Resources (OER) Report

REFERENCE

April 2018	Board received an update on an Open Educational Resources (OER) initiative.
June 2018	Board discussed system-wide access and affordability strategies including OER and requested an inventory and implementation timeline be provided at the October 2018 Board meeting.
August 2018	Board approved a line item request for OER funding.
December 2018	The Board was provided with a timeline and inventory update regarding OER and the total number of course sections delivered exclusively with OER throughout Idaho colleges and universities.
April 2019	The Board was provided with an inventory of common indexed courses for which funding will be focused for OER adoption.
August 2019	The Board approved the first reading of proposed new Board Policy III.U. Textbook and Instructional Material Affordability.
October 2019	The Board approved the second reading of proposed new Board Policy III.U. Textbook and Instructional Material Affordability.
February 2021	The Board temporarily waived the implementation deadline for Board Policy III.U.
April 2021	The Board approved the first reading of proposed amendments to Board Policy III.U. Textbook and Instructional Material Affordability that set expectations for goal-oriented, institution-specific, and measurable access and affordability initiatives at Idaho institutions.
June 2021	The Board approved the second reading of proposed amendments to Board Policy III.U. Textbook and Instructional Material Affordability

APPLICABLE STATUTE, RULE, OR POLICY

Idaho State Board of Education Governing Policies & Procedures, Section III.U.

BACKGROUND/DISCUSSION

The cost of instructional materials for college students continues to far outpace the rate of inflation. The American Enterprise Institute reported that textbook costs rose 182 percent between 1998 and 2016[1], and other sources report an increase of over 1,000 percent since the 1970s[2]. Over the past several years, institutions

[1] https://www.aei.org/carpe-diem/chart-of-the-day-the-astronomical-rise-in-college-textbook-prices-vs-consumer-prices-and-recreational-books/
[2] https://www.nbcnews.com/feature/freshman-year/college-textbook-prices-have-risen-812-percent-1978-n399926

across the United States, including in Idaho, have responded to this alarming trend by deploying cost-saving programs and other measures to help students access more affordable instructional materials. These collective actions have likely helped stem the rise in textbook costs, which appear to have leveled off. However, despite recent plateaus in textbook cost prices, a 2021 survey of 5,000 college students at 80 U.S. institutions revealed that 65% of students did not purchase a textbook for a class because of affordability concerns, despite believing that going without required materials would negatively impact their grades.[3] This report indicated that student access to instructional materials has gotten worse as a result of the COVID-19 pandemic, compounded by other factors like loss of employment, unreliable internet access, and food insecurity.

The Board envisions a student-centered education system that creates opportunities for all Idahoans to improve their quality of life. To achieve this vision, the Board prioritizes access to educational opportunities for all, regardless of geography or socioeconomic status. Increasing access to, and affordability, of instructional materials in higher education is a critical part of accomplishing this vision.

In October 2019, the Board adopted a new policy, Board Policy III.U. Textbook and Instructional Material Affordability, to establish minimum standards for textbook affordability at Idaho's four-year public institutions. An amended version of this policy was approved by the Board in June 2021, after receiving input from faculty and academic leaders at all eight postsecondary institutions. The policy positions Open Educational Resources (OER) as the primary element of institutions' textbook affordability plans. In particular, the policy requires the four-year institutions to develop plans to increase access and affordability of instructional materials. The policy defines several required elements that must be included in the plans and identifies several optional elements that institutions may consider including in their plans. The policy also requires institutions to submit their plans to the Board office and provide annual reports on the implementation and outcomes of the plans.

All eight institutions submitted plans in summer 2022. The community colleges submitted their plans in response to the $1M in funding provided by the Legislature in FY2022 to support the development of Zero Textbook Cost Degrees, or pathways that allow students to complete an associate degree for zero or very low instructional materials' cost.

Additionally, in Spring 2022, the Board office conducted a survey of faculty to better understand their course-level efforts to increase access and affordability of instructional materials and their practices and perceptions related to OER. Faculty who taught courses with reliably zero or very low instructional materials' costs were asked to complete the survey.

[3] https://uspirg.org/reports/usp/fixing-broken-textbook-market-third-edition

Finally, the Board Office has recently allocated $50K per year ongoing to support the Open Pedagogy, Advocacy and Leadership (OPAL) Fellowship program, which supports faculty in adapting, adopting, and creating OER, as well as helping them become leaders in the open education movement in Idaho and beyond.

IMPACT

The new requirements in Board Policy III.U led all eight institutions to establish clear strategic plans for increasing access and affordability to instructional materials over the past year. Many institutions created task forces or workgroups comprised of stakeholders from across campus to develop these plans. For example, Boise State University has established an "Affordable Learning Committee" with a charge to "act as a mechanism to gather together key stakeholders including student, faculty, instructor, and staff representation" in support of the goals of the institution's plan. All institutional plans address the elements required by policy, and many address several optional elements as well.

The OER Faculty Survey revealed that many faculty across the state actively use OER, understand its purpose and promise, and consider student financial needs in deciding which instructional materials to assign.

The OPAL Fellowship is in its second round, with 19 faculty from across the state participating in the program this academic year. An initial 13 fellows participated in the previous academic year. Many of these faculty have produced new OER that are hosted on the Idaho Open Press[4], a repository of openly licensed, locally developed content maintained by the Board Office.

ATTACHMENTS

Attachment 1 – OER Report Presentation
Attachment 2 – Institutional Plans to Increase Instructional Materials Access and Affordability - 2022

STAFF COMMENTS AND RECOMMENDATIONS

Increasing access and affordability of instructional materials requires significant culture change among faculty and academic leaders. Many productive examples of such culture change already exist in Idaho. The new version of the policy promotes best practices that have already proven successful within and beyond Idaho and encourages new, practical experimentation in scaling access and affordability efforts across our state. In particular, the requirements for institutional plans place the responsibility for establishing relevant goals and outcomes squarely on the shoulders of the institutions—allowing each to attend to its unique contexts while also encouraging collaboration on common interests and programs (e.g., common-indexed GEM courses, shared degree pathways, etc.).

[4] https://idaho.pressbooks.pub/

The policy requirements are supported by the funding allocated from the legislature and the Board Office for open education-related initiatives, including an initial legislative investment of $50K for supporting faculty to develop open textbooks, an ongoing Board Office investment of $50K annually to support the Openness in Pedagogy, Advocacy and Leadership (OPAL) Fellowship program, and $1M in FY 2022 for Zero Textbook Cost Degrees in the community colleges.

BOARD ACTION

This item is for informational purposes.

Open Educational Resources (OER) Report

December 21, 2022

1.
OER - A Brief Overview
Open Educational Resources

An International Definition of OER

Open Educational Resources (OER) are learning, teaching and research materials in any format and medium that reside in the public domain or are under copyright that have been released under an open license, that permit no-cost access, re-use, re-purpose, adaptation and redistribution by others.

-UNESCO Recommendation on OER, 2019

https://www.unesco.org/en/legal-affairs/recommendation-open-educational-resources-oer

Idaho's Definition

Open Educational Resources (OER) are learning, teaching and research materials that reside in the public domain or are have been released under an intellectual property license copyright, such as a Creative Commons license, that permits free use and repurposing by others.

-Board Policy III.U. Instructional Materials Access and Affordability, 2021

https://boardofed.idaho.gov/board-policies-rules/board-policies/higher-education-affairs-section-iii/iii-u-instructional-materials-access-and-affordability/

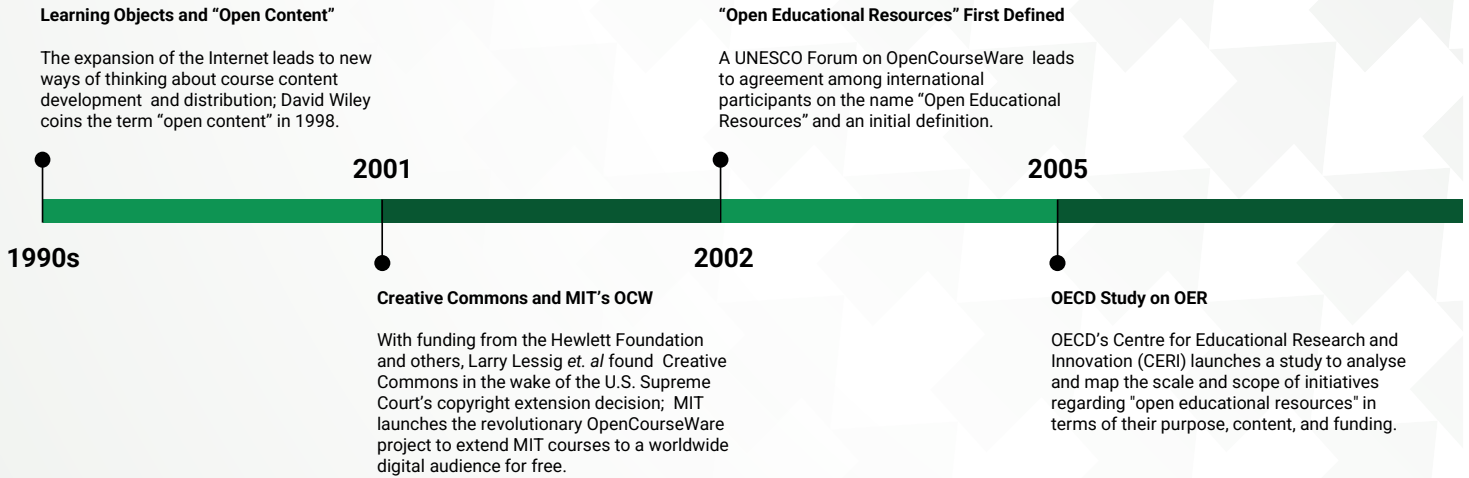
Purpose of OER

Recognizing that, in building inclusive knowledge societies, Open Educational Resources (OER) can support quality education that is equitable, inclusive, open and participatory as well as enhance academic freedom and professional autonomy of teachers by widening the scope of materials available for teaching and learning,

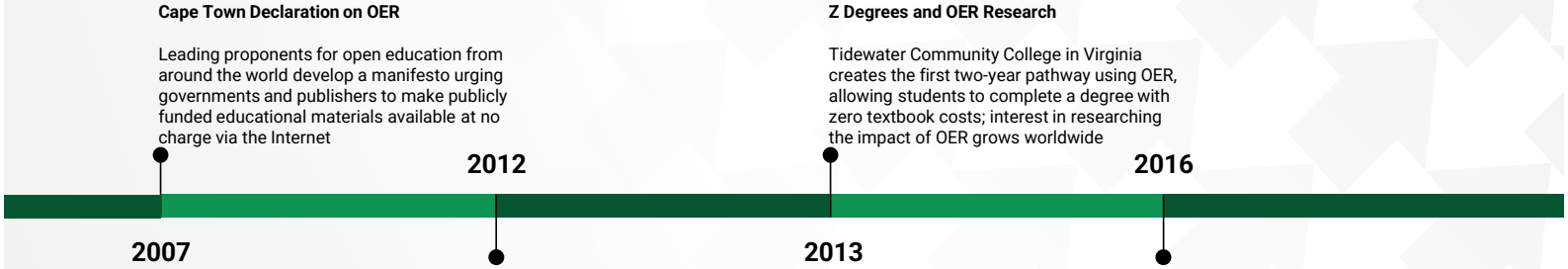
-UNESCO Recommendation on OER, 2019

https://www.unesco.org/en/legal-affairs/recommendation-open-educational-resources-oer

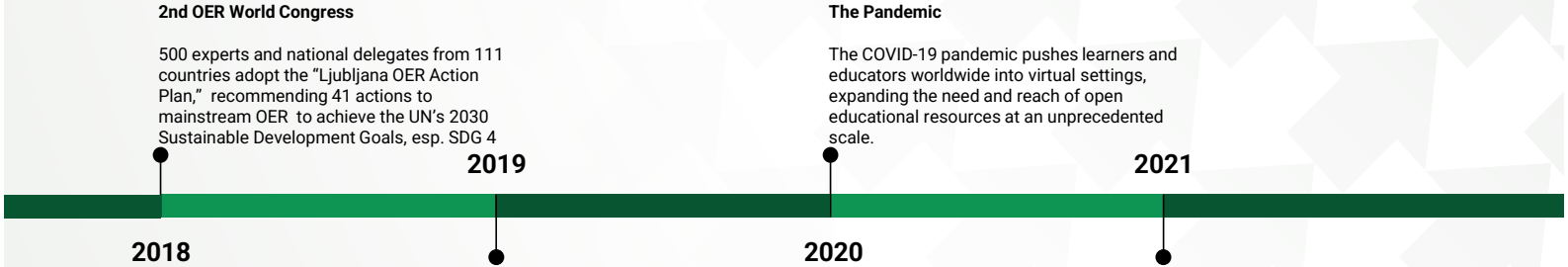
An OER Timeline



An OER Timeline



An OER Timeline



2018

2nd OER World Congress

500 experts and national delegates from 111 countries adopt the "Ljubljana OER Action Plan," recommending 41 actions to mainstream OER to achieve the UN's 2030 Sustainable Development Goals, esp. SDG 4

2019

UNESCO Recommendation on OER

After three years of regional meetings, the UNESCO General Conference adopts a Recommendation on OER addressing five "action areas" for promoting and expanding the use of OER in educational settings throughout the world.

2020

The Pandemic

The COVID-19 pandemic pushes learners and educators worldwide into virtual settings, expanding the need and reach of open educational resources at an unprecedented scale.

2021

Expanding Public Support

Idaho allocates $1M for OER Degrees at all four community colleges in the state (the most per capita in history); one month later, California allocates $115M for OER Degrees at all 116 community colleges in the state (the most per capita in history); states and governments throughout the world, including Idaho, continue developing and improving policy related to OER.

8

2.

OER Research

The Impact of OER on College Students

More Recent Research

Clinton and Kahn, 2019

A meta-analysis examining learning performance of 100,012 students (22 studies) found equivalent learning between open and commercial textbooks.

An examination of withdrawal rates of 78,593 students (11 studies) found that courses with open textbooks had withdrawal rates that were 29% lower than courses with commercial textbooks.

https://journals.sagepub.com/doi/full/10.1177/2332858419872212

10

3.
Board Support for OER
OPAL, ZTC Degree, Policy III.U.

HB 267, Section 5, 2019

SECTION 5. OPEN EDUCATION RESOURCES. Of the amount appropriated in Section 1 of this act for open education resources, up to $50,000 from the General Fund shall be used to pilot open education resources for postsecondary courses. Selection of the eligible course(s) for the pilot shall include consideration of the number of students taking the course systemwide, the cost of traditional textbooks associated with the course, and availability of the course to secondary students through dual credit. Development of the open education resources shall be collaborative and serviceable to general education courses at no less than four (4) postsecondary institutions.

OPAL Fellowship Program

Openness: Regular, statewide engagement with affinity/inquiry groups

- ⇨ Statewide opportunities to directly influence policies
- ⇨ Weekly open office hours on relevant topics

Pedagogy: Aligning priorities with teaching/learning goals

- ⇨ Interoperable teaching and learning tools/opportunities available
- ⇨ Interinstitutional, discipline-specific professional development opportunities

Advocacy: Formal recognition and promotion of effective practice

- ⇨ Comprehensive policy/literature reviews for interpolicy oversights
- ⇨ Reliable systems of faculty/student support and recognition

Leadership: Giving power to those closest to the pain

- ⇨ Multi-semester inter-institutional faculty fellowships
- ⇨ Original research and publication

PB

H5P

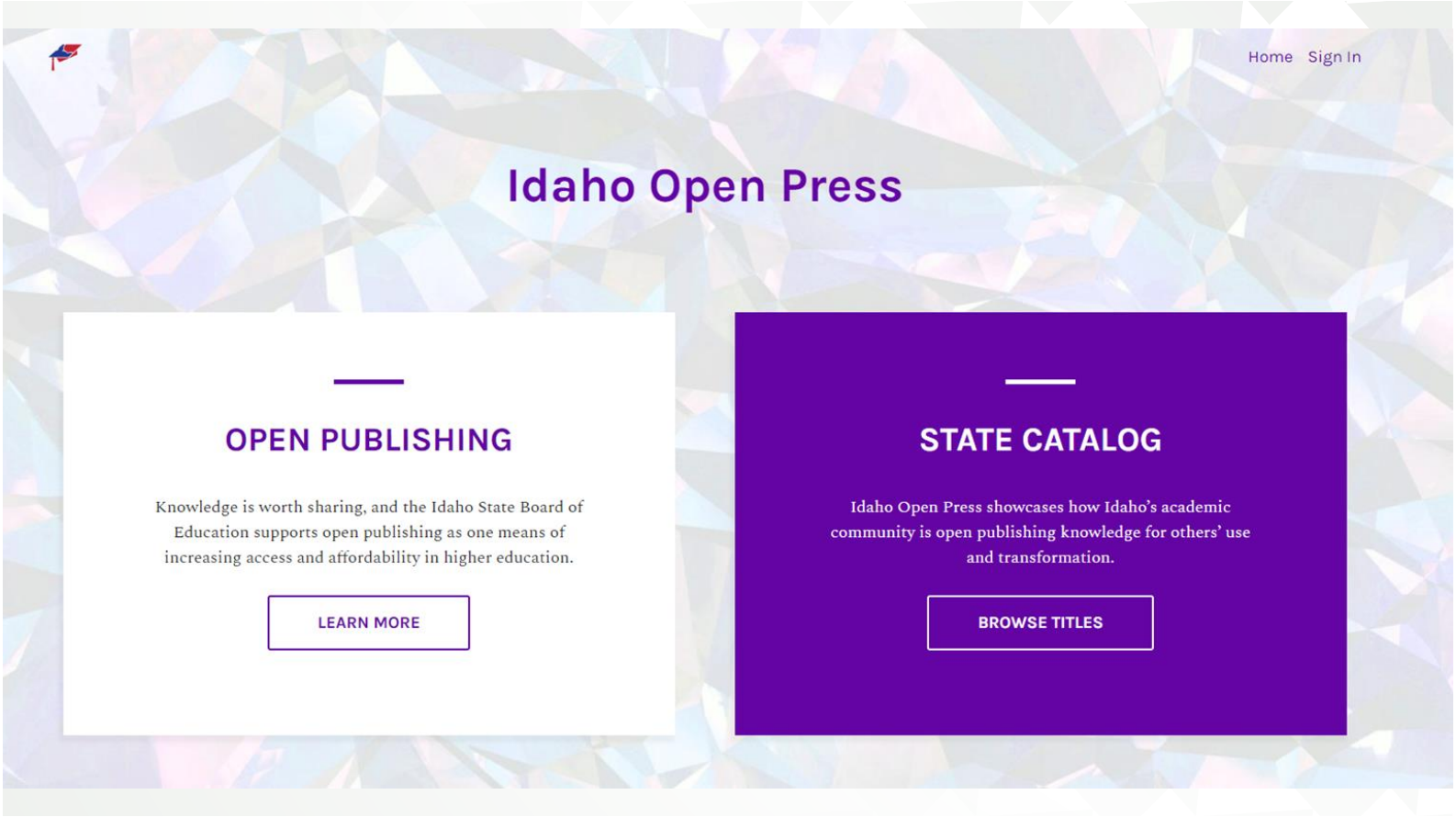
canvas
BY INSTRUCTURE

OPAL

Rebus COMMUNITY

OPEN EDUCATION NETWORK
Member

13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BROWSE TITLES

Project Z-Degree Will Make College More Affordable

By Kurt Liebich, President, Idaho State Board of Education

The 'Z' in Project Z-degree stands for 'zero cost' and the goal is to make it possible for students to earn an associate degree with zero or very low textbook costs.

The Idaho Legislature and Governor Brad Little jump-started this change initiative by investing $1 million in Project Z-degree earlier this year as part of the Governor's "Building Idaho's Future" initiative.

The money will be used to help community college faculty who choose to participate in the effort transition their courses to zero-cost or very low-cost instructional materials such as open educational resources, or OER. "It really

Policy III.U. Instructional Materials Access and Affordability

- Definitions
  - Automatic Charge
  - Course Marking
  - Instructional Materials
  - Cost (zero, very low, low, mid, high)
  - Open Educational Resources

Policy III.U. Instructional Materials Access and Affordability

- Institution Plans (Required Elements)
  - **Resources and support for faculty to ensure accessibility of materials**
  - **Institutional policies and strategies to minimizing material costs and promote OER**
  - **Professional Development for faculty re: OER**
  - **Course marking processes for some courses**
  - **Strategies for using OER in common-indexed courses (gen-ed)**

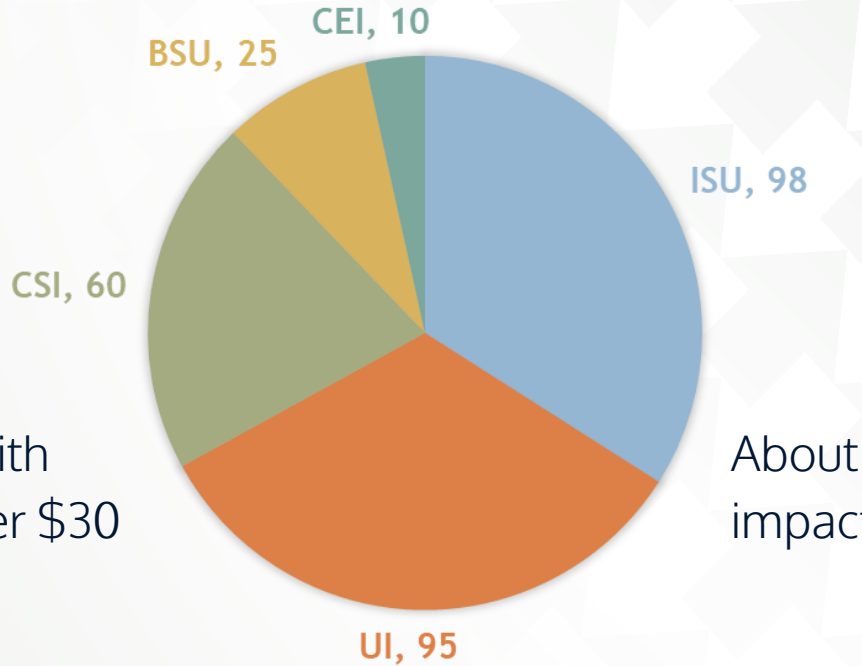
Policy III.U. Instructional Materials Access and Affordability

- Institution Plans (Optional Elements)
  - Course marking process for all courses
  - **Strategies for using OER in other courses (beyond gen-ed)**
  - **Institutional policies that encourage faculty to be intentional in material selection**
  - **Inclusion of access and affordability efforts in Tenure & Promotion**

4.
Survey of Faculty Use of OER

April 2022

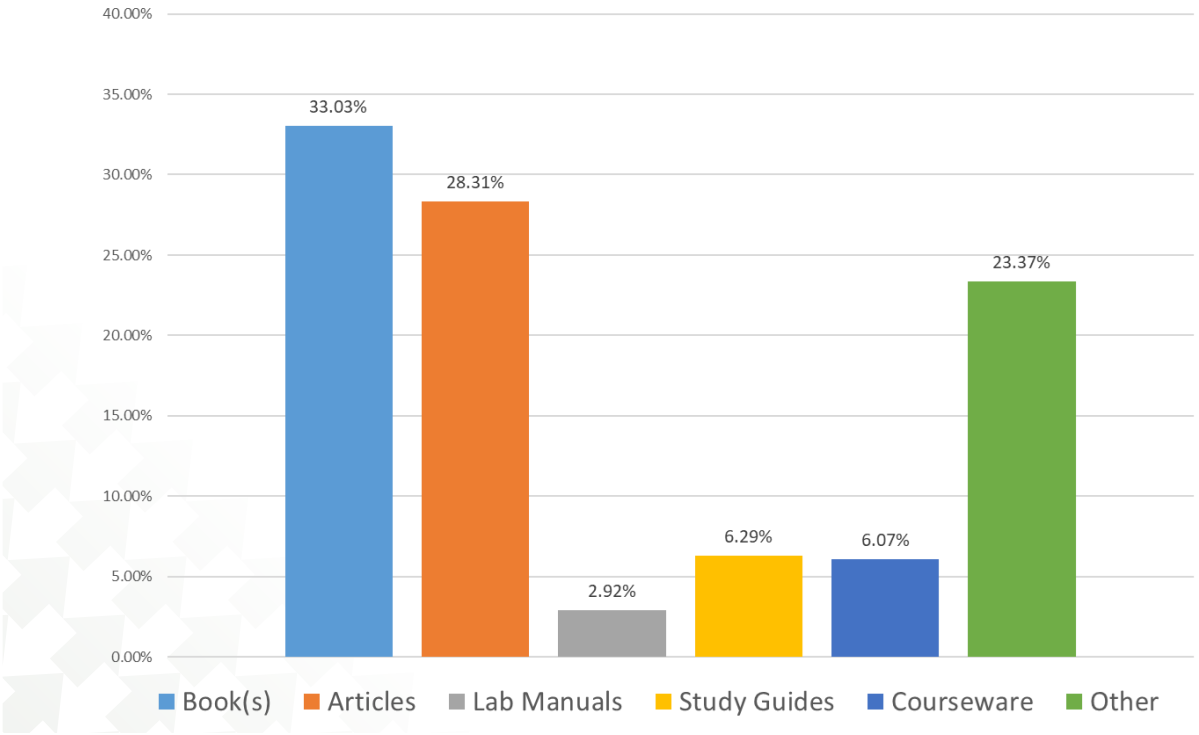
RESPONSES BY INSTITUTION



335 courses with materials under $30

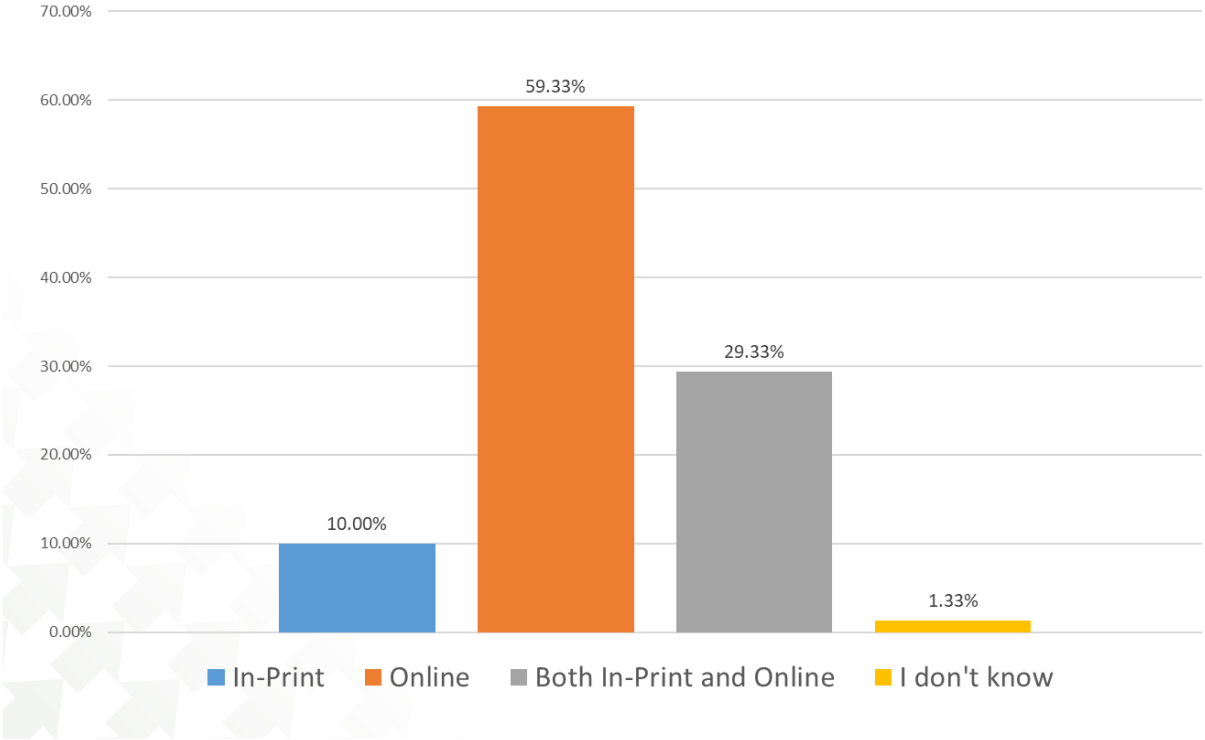
About 10,000 students impacted

Types of Material Required*



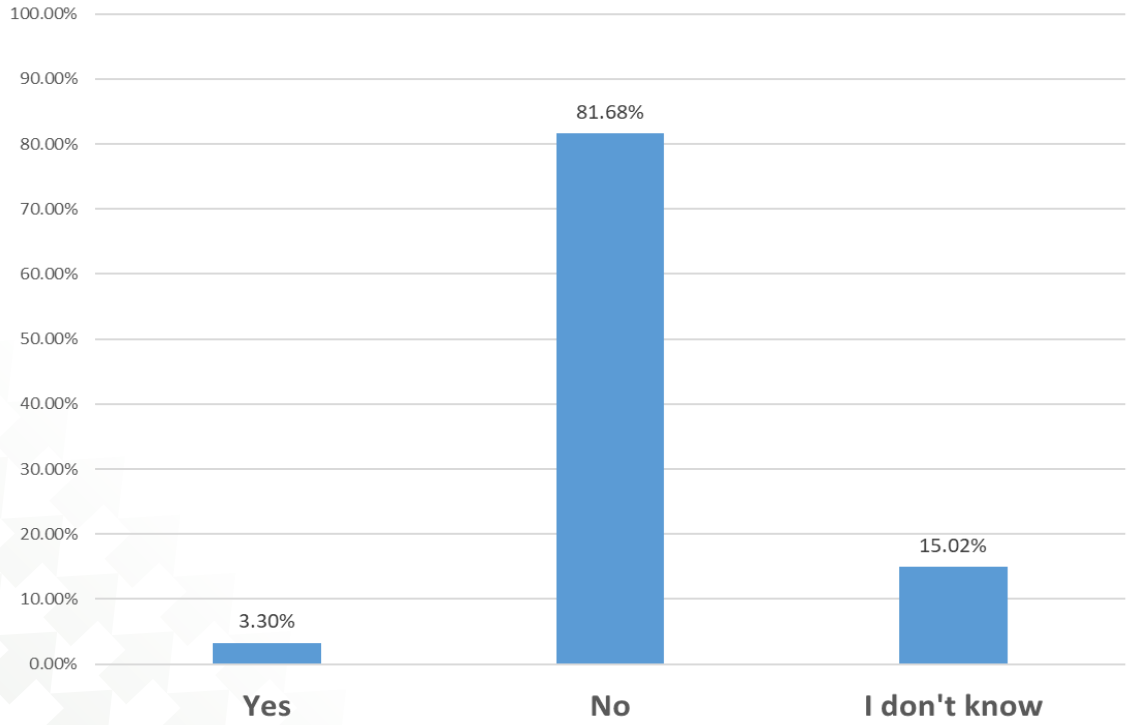
*285 Courses

How Students Access Materials*



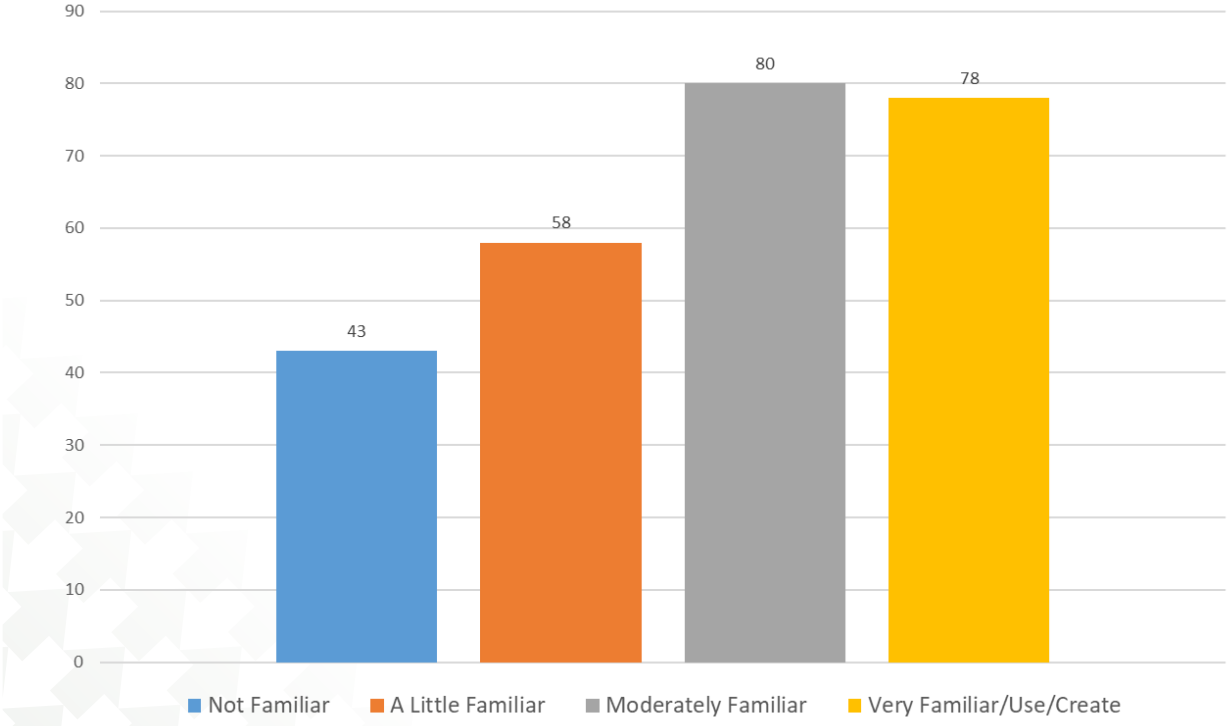
*275 Courses

Automatic Charge Use*



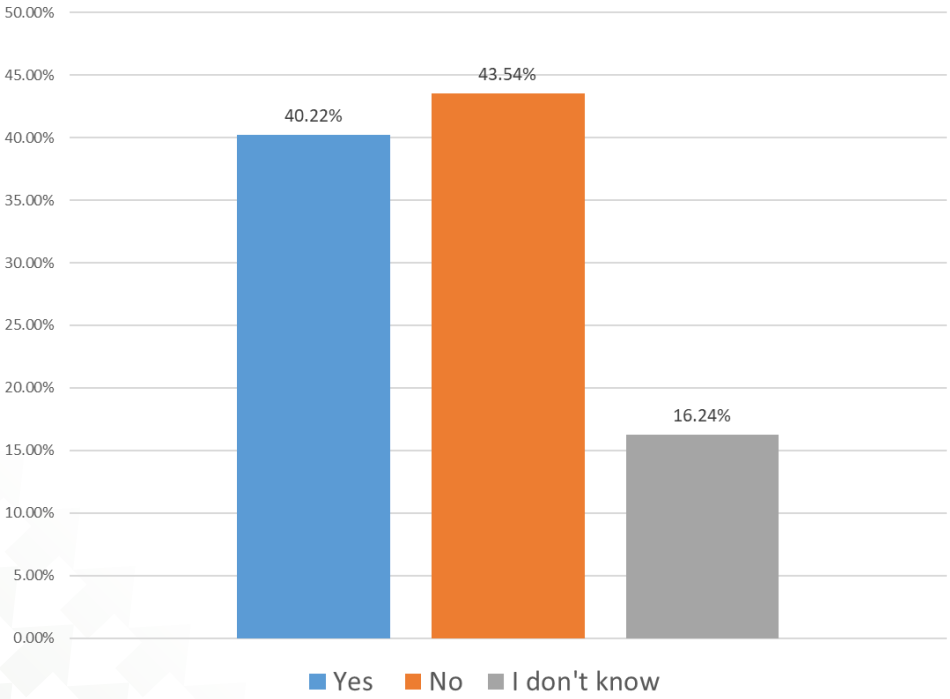
*272 Courses

Faculty Familiarity with OER*



*259 Courses

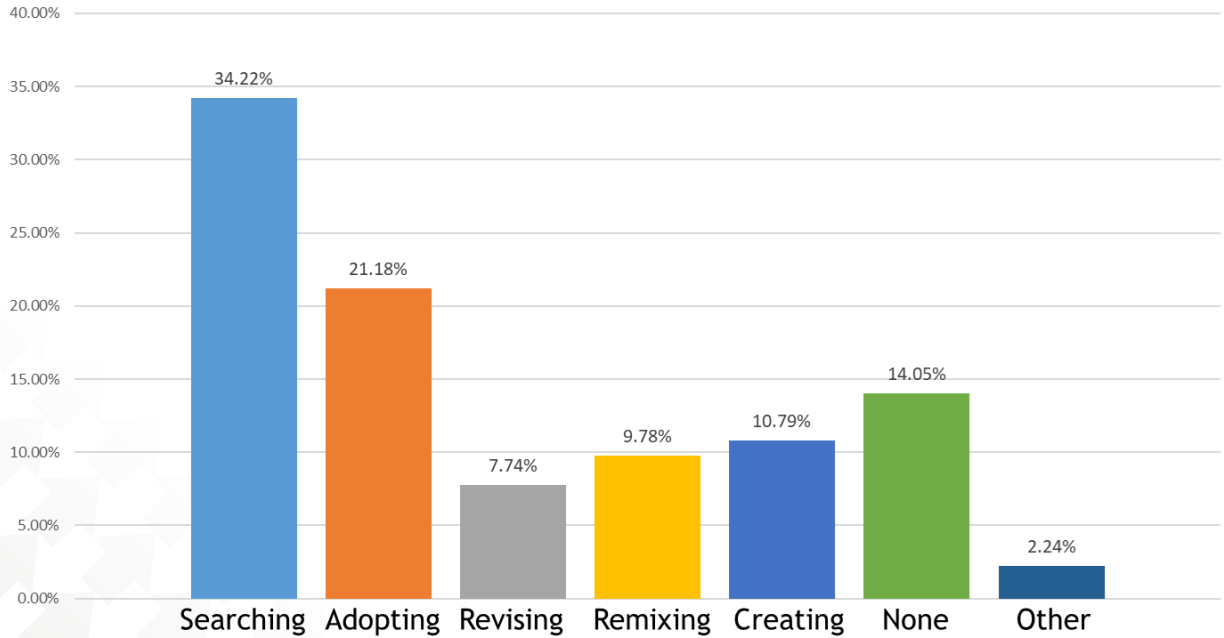
Faculty Use of OER*



*270 Courses

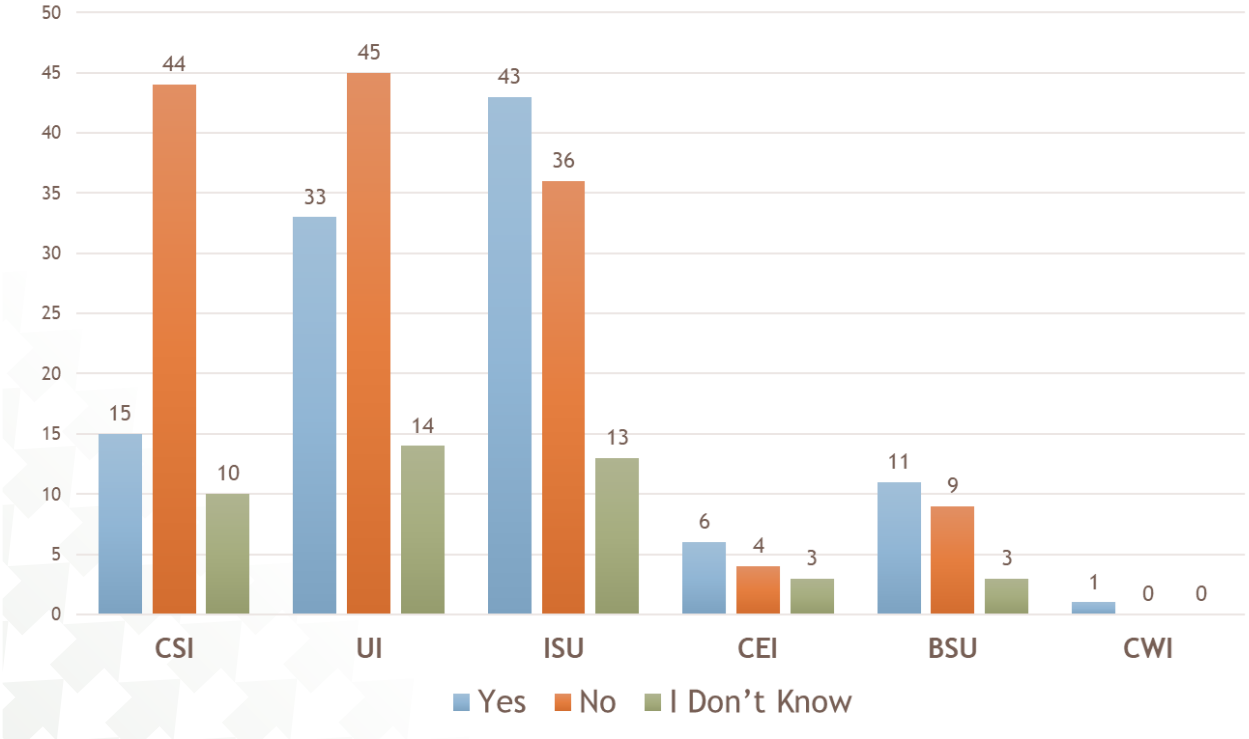
25

Activities Related to OER*



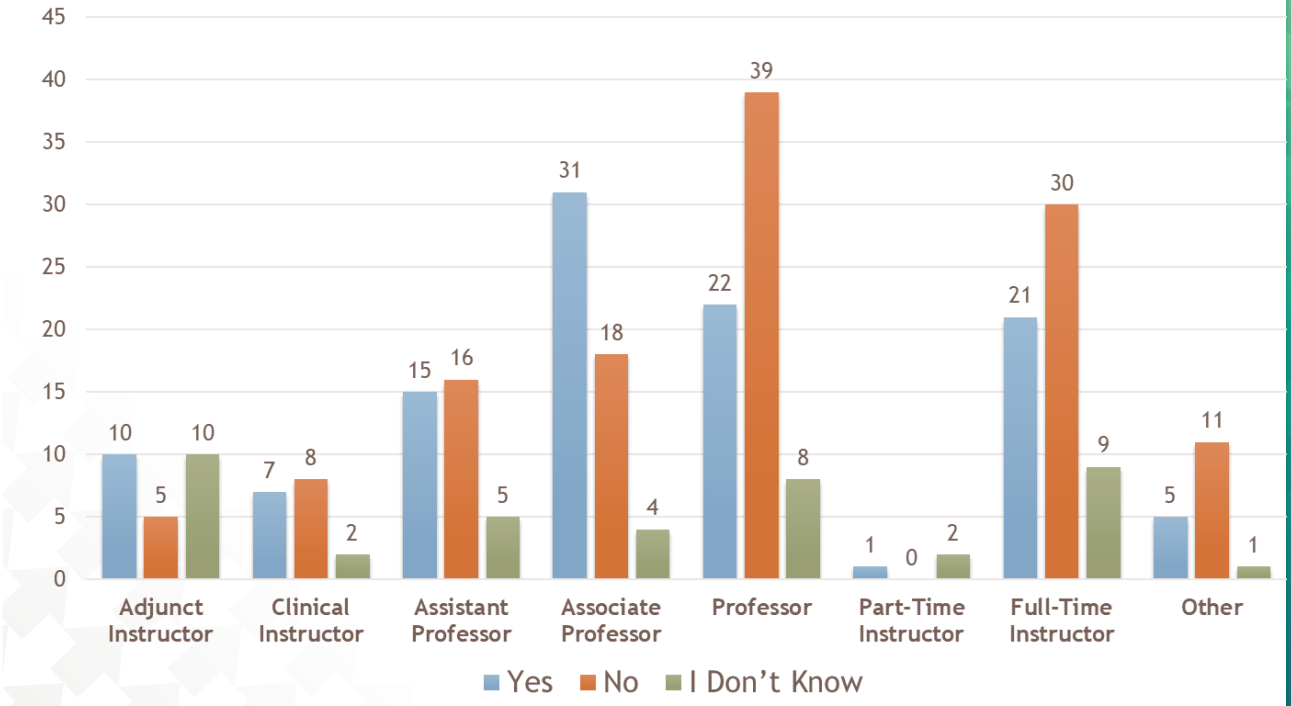
*491 Responses (could choose multiple)

OER Use by Institution*



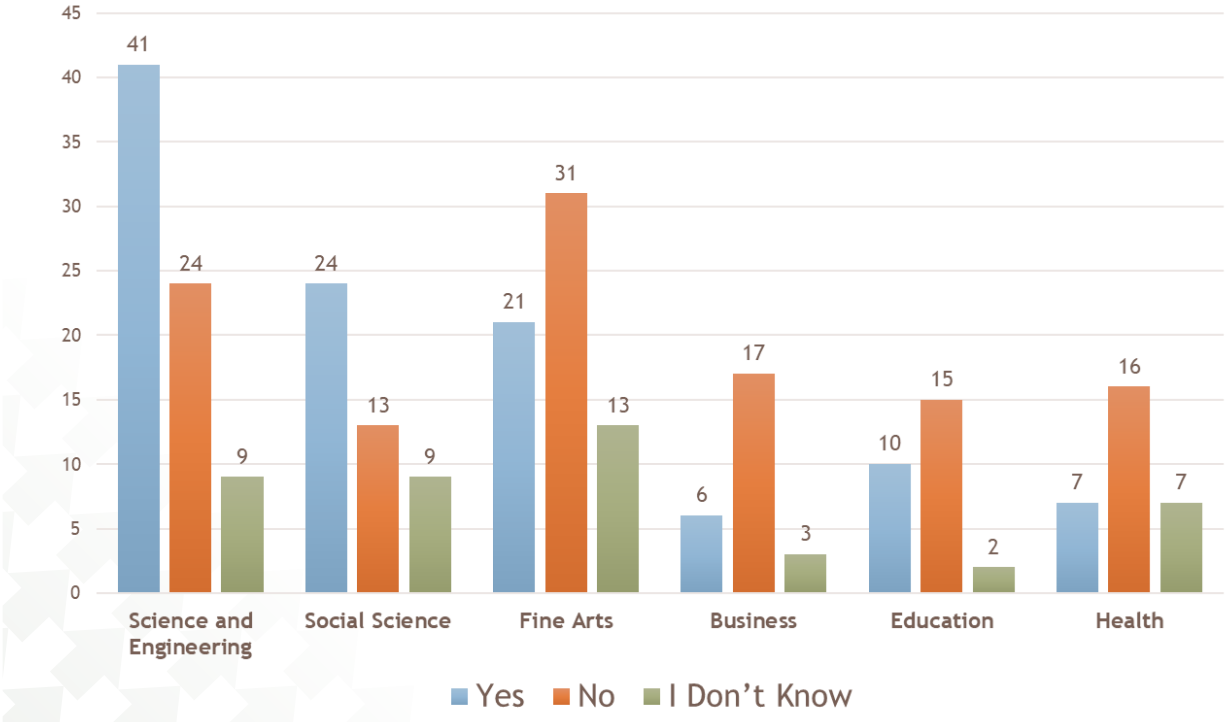
*290 Courses

OER Use by Position/Rank*



*280 Courses

OER Use by Major Discipline*



*286 Courses

Thanks!

Any questions?

Institutional Plans to Increase Instructional Materials Access and Affordability

2022

Table of Contents

Boise State University…….3

College of Eastern Idaho…….30

College of Southern Idaho…..33

College of Western Idaho…….36

Idaho State University……..41

Lewis-Clark State College…..58

North Idaho College……..63

University of Idaho…….66

BOISE STATE UNIVERSITY

Affordable Learning Initiative Action Plan

Context

After input from faculty senate representatives from around the state of Idaho as well as representatives from community colleges, the State Board of Education passed Policy III. U, Instructional Material Access and Affordability during the summer of 2021. This policy requires postsecondary institutions to develop a plan in support of access and affordability of learning materials.

Policy III. U. asks that plans address the following elements:

- *Resources and support to help faculty ensure all instructional materials are relevant and accessible for all students, especially those who require learning accommodations or additional modes of delivery (e.g. a print version of a digital textbook, internet access, etc.).*
- *Policies and/or strategies that minimize the cost of instructional materials for students while maintaining the quality of education, the academic freedom and responsibility of faculty and students, and the recognition that the average cost of instructional materials is higher in certain disciplines, and some disciplines require higher cost materials which are used over multiple terms or throughout an entire program.*
- *Professional development opportunities for faculty and staff related to the discovery, adoption, and use of OER and other affordable instructional materials.*

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- *Strategies to support faculty adoption, adaption, and/or use of OER and other affordable instructional materials.*
- *Programs, incentive structures, or other strategies to encourage and support faculty to publicly share OER developed for their own courses.*
- *Course marking processes at the time of course schedule releases that indicate the cost of instructional materials in course sections that are reliably zero cost or very low cost, as defined in this policy.*
- *Course marking processes at the time of course schedule releases that indicate course sections that reliably require the purchase of, including an automatic charge for, any access codes for instructional materials.*
- *Strategies with measurable goals for improving and using readily available and relevant OER or other very low cost instructional materials in common indexed courses as articulated in Board Policy III.N.6.b, including dual credit courses.*

Although open educational resources (OER) are a component of the required plans, the policy addresses affordability of learning materials in a broader sense. Therefore, in order to move a plan forward for Boise State University in a thoughtful manner, it needed to include voices from diverse campus stakeholders. At the end of 2021, the Provost's Office appointed a Learning Materials Access and Affordability (LMAA) Task Force charged with the development of a university plan in support of access and affordability of instructional materials.

Introduction

Boise State University seeks to support and encourage faculty in transitioning their courses, where possible, to affordable learning materials, including alternatives to traditional textbooks. For the purposes of this work, we define affordable learning materials as materials that do not incur a significant additional per semester cost for students. These solutions may include both free and very low-cost (no more than $30 total list price per course) resources.

In compiling this plan we acknowledge the following guiding principles: that students come first; that we as a campus are committed to affordability, access, and accessibility of learning materials for all; and that academic freedom of instructors is essential. Throughout this plan the

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LMAA Task Force discusses affordable learning as encompassing a number of course material types that might be considered affordable. Among the spectrum of course material options the Task Force evaluated attributes for inclusion such as those outlined in Figure 1: free to students, duration of access, accessibility, availability on day-one of a course, etc. Affordable learning in the context of this plan refers to the following three categories of learning materials:

> **Open Educational Resources** "are learning, teaching and research materials in any format and medium that reside in the public domain or are under copyright that have been released under an open license, that permit no-cost access, re-use, adaptation and redistribution by others." (UNESCO)
>
> **Open Access Content** "is digital, online, free of charge, and free of most copyright and licensing restrictions. What makes it possible is the internet and the consent of the author or copyright-holder." (Suber, 2004)
>
> **Library Licensed Content** are library collections (primarily online materials) that can be used in the classroom. This can include an array of materials such as streaming video, chapters from multi-user ebooks, case studies, articles from journals, and more. Materials such as these can be linked as an e-reserve or within the learning management system (Jensen, n.d.). Library licensed content represents materials that reside behind a paywall and are inaccessible to students without an active Boise State University log-in.

While Boise State University encourages the adoption, revision and/or development of open educational resources, we understand that they may not be the best option for all courses. We affirm instructor choice in selecting resources that maintain excellent teaching and learning outcomes in their disciplines.

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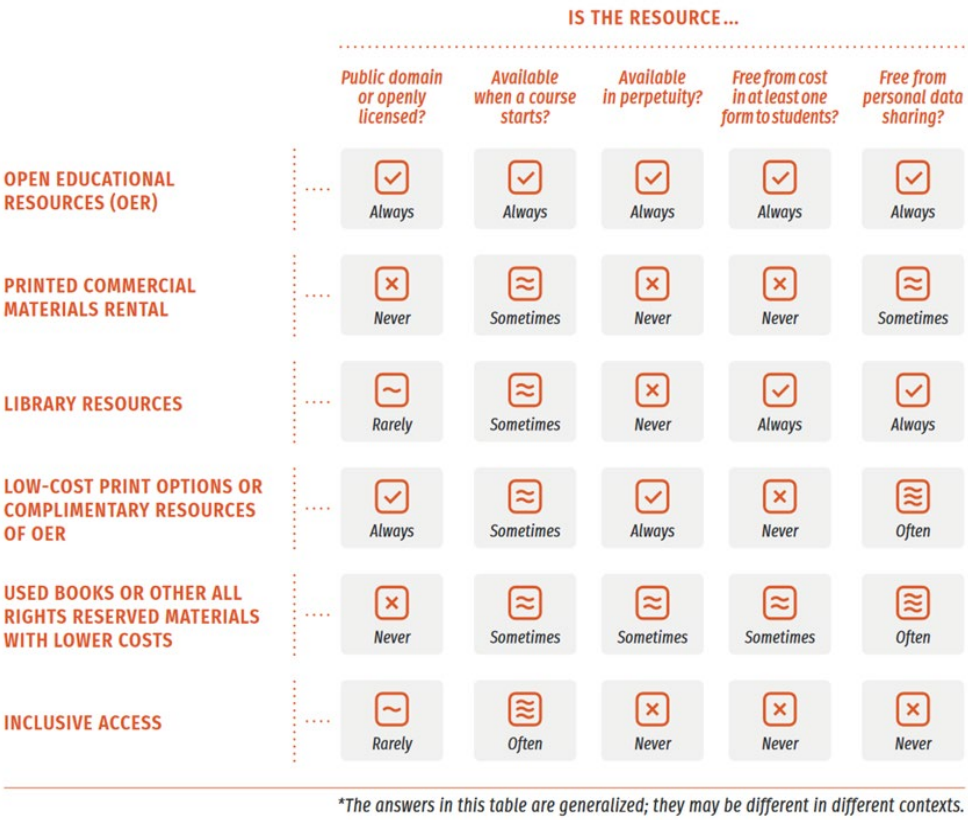

Figure 1. A comparison table of how frequently different types of learning materials (e.g. OER, printed commercial materials, inclusive access) are openly licensed, available when a course starts, available in perpetuity, free from cost to students in at least one form, and free from personal data sharing (Zaback, 2022).

Three primary groups were identified as being actively involved in facilitating access to, and supporting the creation of, affordable learning materials: Albertsons Library, Boise State OER Group, and the Center for Teaching and Learning. There was recognition that this work was also supported through numerous efforts across campus including the Bronco Shop, eCampus Center, Educational Access Center, and Learning Technology Solutions. While significant work has been done across campus to grow and advocate for OER in particular, led by the efforts of the OER Group (a driven community of practice), it was fragmented in nature and unable to support instructors campus-wide.

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A central challenge in understanding the extent to which faculty have adopted affordable learning materials is the fact there is a significant deficit of harvested, detailed data at Boise State University around this subject. The OER Group shared that they have often discussed methods for collecting such information on a large scale, but the task was outside the scope of an informal group. The campus bookstore has an option to designate OER as a course material when faculty fill out course material requirements for their courses, but this data is not comprehensive and messaging does not provide a definition of OER to instructors which may lessen self-identification. The library attempts to collect information about library-licensed material usage in the classroom when items are ordered, but this data is piecemeal in nature. Finally, both the OER Group and the eCampus Center have offered grant opportunities in the past to encourage the adoption, adaptation, or creation of OER by instructors of online programs. Data based around these grant programs is available, but does not capture courses or instructors working outside of eCampus Center supported programs, thus representing an incomplete picture of the campus landscape.

Using the information gathered from the environmental scan, the LMAA Task Force collaboratively prioritized four primary categories to focus their efforts: accessibility, assessment, course marking, and OER. LMAA aligned existing efforts that connected directly to these categories as well as identified areas for growth at Boise State. This phase of our process was crucial to having an accurate picture of current services, staffing, and potential gaps to address in order to support affordable learning.

Action Items

After the environmental scan phase the LMAA Task Force was able to identify four primary action items. These action items reflect what is possible without significant additional monetary or workforce investment. They outline methods for a collaborative, across-campus approach to support instructors in learning about and adopting affordable learning materials at the

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instructors' own pace, and propose opportunities to collect data around affordable learning to track and assess progress.

Action Item 1 - Establish and Promote Affordable Learning Services

This action item seeks to align existing services (see Appendix A: Current Affordable Learning Services) with Boise State's Affordable Learning Initiative. The goal is to develop a framework for instructors to be able to easily access services that support affordable learning.

This goal will be achieved through development of a web presence that directs instructors to the services that support affordable learning at Boise State. This website will act as a single access point to provide clarity for instructors to know what support is available within the scope of affordable learning. Content will include information for training, tools, points of contact, etc. This approach will help units where these services live ensure timely communication of resources to instructors, and support necessary referrals to other units on campus. The website will also serve as a platform to share select assessment outcomes of Boise State's Affordable Learning Initiative.

Estimated timeline	Partners	Additional Partners
Initial Website Development • 3-6 months *Website Maintenance (e.g. responding to user experience, adding new services)* • Ongoing	Albertsons Library, Bronco Shop, Center for Teaching and Learning, eCampus Center, Educational Access Center, Learning Technology Solutions, Office of the Registrar, University Foundations	Office of Information Technology, IT Accessibility Committee

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Assessment Strategies
(See Appendix B: Sample Assessment Strategies)

Website

- Analyze the environmental scan data from LMAA as a framework for creating this one access point for affordable learning.
- Utilize university web analytics to track usage data, trends, popular pages, etc.
- Survey of affordable learning partners to evaluate improvement in communication of resources, ease of referrals to other services, and suggested additions.

Policy III.U.

Action Item 1 addresses portions of the following elements of Policy III.U.:

- Resources and support to help faculty ensure all instructional materials are relevant and accessible for all students, especially students who require learning accommodations or additional modes of delivery (e.g. a print version of a digital textbook, internet access, etc.).
- Policies and/or strategies that minimize the cost of instructional materials for students while maintaining the quality of education, the academic freedom and responsibility of faculty and students, and the recognition that the average cost of instructional materials is higher in certain disciplines, and some disciplines require higher cost materials which are used over multiple terms or throughout an entire program.

Blueprint for Success

Action Item 1 connects to the following goals and strategies of Boise State's Strategic Plan:

- Goal 1 - Improve Educational Access and Student Success
  We can enhance the comprehensive student experience with a focus on student success and post-graduate outcomes.
  - Strategy 3 - Expand educational access for all Idahoans through improved outreach, communication, financial aid, philanthropy, online resources and education.
  - Strategy 4 - Cultivate a commitment to high-quality, new and innovative learning experiences in all courses, curricula and co-curricula.

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Action Item 2 - Appoint an Affordable Learning Committee

In order to maintain momentum on the work the LMAA Task Force has begun, form a campus-level Affordable Learning Committee under the guidance of the Provost's office. This committee will act as a mechanism to gather together key stakeholders including student, faculty, instructor, and staff representation. The committee's charge should consider responsibilities for implementation of Boise State's Affordable Learning Initiative such as:

- Compile the annual report on the implementation and outcomes of the affordable learning work for submission to the SBOE.
- Continue to evaluate existing course schedules and course material adoption workflows and platforms to develop a process for course marking for both zero and very low-cost courses.
- Determine essential data to collect in the course marking processes to allow for ongoing assessment of the impact of the Affordable Learning Initiative on teaching and learning at Boise State.
- Make recommendations to university administration for new policies and incentive structures tied to the Affordable Learning Initiative. Maintain an awareness of how policies and incentive structures support diverse instructor types (e.g. tenure track faculty and tenured faculty, lecturers, adjunct instructors, clinical faculty).
- Provide input on whether new programs fall within the scope of Affordable Learning at Boise State.
- Facilitate conversations for how faculty may view their OER efforts in tenure and promotion processes as part of their workload assignments per Policy 4.1.4. See Appendix C: OER in Tenure and Promotion Resources for examples.

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Estimated timeline	Partners	Additional Partners
***Note this is a sequential timeline.** *Forming a Committee* • 3-6 months *Determine Essential Data to Collect* • 3-6 months *Course Marking* • 3-6 months for continued research • 9-12 months for trial implementation *Policy / Incentive Structure Recommendations* • Ongoing *Annual Report* • Prepare annually each spring semester	Albertsons Library, Bronco Shop, Center for Teaching and Learning, Faculty Senate, Office of the Registrar, Student Senate	eCampus Center, Educational Access Center, Learning Technology Solutions, University Foundations

Assessment Strategies *(See Appendix B: Sample Assessment Strategies)*
Annual Report • Analysis of overall data from campus stakeholders in affordable learning, including statistics form from Action Item 3 assessment. • Benchmark progress in each part of the action plan and make adjustments for future iterations as needed.
Course Marking • As early iterations of course marking occur, maintain documentation on lessons learned to ensure knowledge management for the future. • In coordination with the registrar's office, capture the actual number of sections that reside within the zero to very low-cost range over time as well as the enrollment data for those sections. • In coordination with Bronco Shop and Library, capture data on learning material types that fall within the scope of affordable learning.
Incentive Structures • Survey partners (e.g. Center for Teaching and Learning) to capture both qualitative perspective of incentive structures as well as quantitative data regarding number of instructors supported, queries for specific types of incentive opportunities, etc.
Committee Scope & Progress • Conduct a pre/post survey of committee members each academic year.

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Policy III.U.

Action Item 2 addresses portions of the following elements of Policy III.U.:

- Policies and/or strategies that minimize the cost of instructional materials for students while maintaining the quality of education, the academic freedom and responsibility of faculty and students, and the recognition that the average cost of instructional materials is higher in certain disciplines, and some disciplines require higher cost materials which are used over multiple terms or throughout an entire program.
- Programs, incentive structures, or other strategies to encourage and support faculty to publicly share OER developed for their own courses.
- Course marking processes at the time of course schedule releases that indicate the cost of instructional materials in course sections that are reliably zero cost of very low cost, as defined in this policy.
- Course marking processes at the time of course schedule releases that indicate course sections that reliably require the purchase of, including an automatic charge for, any access codes for instructional materials.
- Strategies with measurable goals for improving and using readily available and relevant OER or other very low cost instructional materials in common indexed courses as articulated in Board Policy III.N.6.b, including dual credit courses.
- Inclusion of efforts to increase access and affordability of instructional materials as part of tenure and promotion processes.

Blueprint for Success

Action Item 2 connects to the following goals and strategies of Boise State's Strategic Plan:

- Goal 4 - Foster Thriving Community
  We will promote and advance a fair, equitable and accessible environment to enable all members of the campus community to make a living, make a life and make a difference.
  - Strategy 2 - Create a comprehensive, whole-employee experience that aligns university resources and is designed to enhance employee well-being and career growth at the university.
  - Strategy 3 - Create a transparent, centralized business operations model that responsibly uses university resources, supports collaboration, and promotes consistency across individual campus units.

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Action Item 3 - Design and Implement Training

Center for Teaching and Learning, Albertsons Library, and Educational Access Center to collaboratively assess existing training structures such as New Faculty Orientation, Ten for Teaching, Faculty Learning Communities, etc. and identify opportunities to integrate, scaffold, and amplify training focused around accessibility of course materials, open educational resources, and copyright considerations. These groups will also work to create mechanisms for instructors to share about their affordable learning efforts. In addition, these groups will revise and build upon existing workshop materials, as well as consider new possibilities such as an OER Certification. Utilize the website from Action Item 1 as a single access point to these training opportunities.

This action item will build upon existing educational infrastructure at Boise State and provide equitable professional development opportunities for instructors throughout their career at the university.

Estimated timeline	Partners	Additional Partners
Assess Existing Training • 3-4 months *Outline Gaps* • 4-9 months *Develop Modules, Curriculum, etc. to Address Gaps* • 4-6 months	Albertsons Library, Center for Teaching and Learning, Educational Access Center	eCampus Center, IT Accessibility Committee, Learning Technology Solutions, OER Group

Assessment Strategies *(See Appendix B: Sample Assessment Strategies)*
Pre-Training Development • Conduct a campus-wide survey to all instructors tailored toward barriers to OER use to learn what training would be most useful. • Partner with the IT Accessibility Committee to determine where they have identified gaps.

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Training Implementation

- Track the number of attendees completing training opportunities.
- Align attendees with colleges in order to identify trends for future targeted outreach.
- Track the role of attendees within the university in order to determine if the training supports diverse instructor audiences.

User Experience

- Design a brief pre/post assessment for attendees when they attend training.
- Follow-up via email with attendees the following semester to see how they may be implementing what they learned.

Targeted Outreach

- Identify units across campus whose instructors may not be aware of these trainings and directly promote opportunities to these units, including instructors of common indexed courses.
- Work with the IT Accessibility Committee to learn about effectiveness of accessibility policies and additional messaging to incorporate.
- Determine effectiveness through enrollment data and course materials utilized.

Policy III.U.

Action Item 3 addresses portions of the following elements of Policy III.U.:

- Professional development opportunities for faculty and staff related to the discovery, adoption, and use of OER and other affordable instructional materials.
- Strategies to support faculty adoption, adaption, and/or use of OER and other affordable instructional materials.
- Programs, incentive structures, or other strategies to encourage and support faculty to publicly share OER developed for their own courses.
- Strategies with measurable goals for improving and using readily available and relevant OER or other very low cost instructional materials in common indexed courses as articulated in Board Policy III.N.6.b, including dual credit courses.

Blueprint for Success

Action Item 3 connects to the following goals and strategies of Boise State's Strategic Plan:

- Goal 1 - Improve Educational Access and Student Success
  We can enhance the comprehensive student experience with a focus on student success and post-graduate outcomes.
  - Strategy 4 - Cultivate a commitment to high-quality, new and innovative learning experiences in all courses, curricula and co-curricula.
- Goal 2 - Innovation for Institutional Impact

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We will expand and implement leading-edge innovations to provide access to integrated high-quality teaching, service, research and creative activities.
    - Strategy 2 - Build scalable university structures and align philanthropic and strategic investments that support innovation.
- Goal 4 - Foster Thriving Community
  We will promote and advance a fair, equitable and accessible environment to enable all members of the campus community to make a living, make a life and make a difference.
    - Strategy 2 - Create a comprehensive, whole-employee experience that aligns university resources and is designed to enhance employee well-being and career growth at the university.

Action Item 4 - Communication and Promotion

This action item ties to Action Items 1-3 with the goal of clearly communicating university services to support affordable learning and accessibility of course materials. Regular updates to instructors about opportunities to learn about existing services and new opportunities to engage with affordable learning at Boise State will be crucial to building a campus culture around these efforts. Part of this work is to address existing messaging channels that align with the scope of affordable learning at Boise State (e.g. course materials adoption process via Bronco Shop).

This action item relies on Action Item 1 to achieve a cohesive user experience through one primary access point to both information about and materials to support affordable learning. Action Item 4 also has a goal of promoting courses that fall into the zero-cost and low-cost categories as defined by SBOE to the student body. Over time, this action item connects to sharing and promoting the outcomes and impacts of the Affordable Learning Initiative to campus and beyond.

Estimated timeline	Partners	Additional Resources & Partners
• Ongoing	Affordable Learning Committee, Albertsons Library, Bronco Shop, Center for Teaching and Learning	Campus Update, OER Group, Office of Communications and Marketing

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Assessment Strategies
(See Appendix B: Sample Assessment Strategies)

Faculty Inquiries

- Develop a single statistics form for Affordable Learning. Train groups that instructors regularly contact for help (e.g. eCampus, Albertsons Library, Bronco Shop) on using the statistics form. Coordinate with the Affordable Learning Committee on this task.

Marketing Campaigns

- Social media engagement (e.g. likes, shares, etc.).

Communication Effectiveness

- Design a brief "how are we doing" survey intended to gauge user confidence that can be embedded into the website and marketing emails as needed.
- Lead focus groups with instructors to understand the user experience and where they are encountering institutional barriers.

Policy III.U.

Action Item 4 addresses portions of the following elements of Policy III.U.:

- Resources and support to help faculty ensure all instructional materials are relevant and accessible for all students, especially those who require learning accommodations or additional modes of delivery (e.g. a print version of a digital textbook, internet access, etc.).
- Policies and/or strategies that minimize the cost of instructional materials for students while maintaining the quality of education, the academic freedom and responsibility of faculty and students, and the recognition that the average cost of instructional materials is higher in certain disciplines, and some disciplines require higher cost materials which are used over multiple terms or throughout an entire program.
- Professional development opportunities for faculty and staff related to the discovery, adoption, and use of OER and other affordable instructional materials.
- Strategies to support faculty adoption, adaption, and/or use of OER and other affordable instructional materials.
- Programs, incentive structures, or other strategies to encourage and support faculty to publicly share OER developed for their own courses.

Blueprint for Success

Action Item 4 connects to the following goals and strategies of Boise State's Strategic Plan:

- Goal 1 - Improve Educational Access and Student Success

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We can enhance the comprehensive student experience with a focus on student success and post-graduate outcomes.
    - Strategy 3 - Expand educational access for all Idahoans through improved outreach, communication, financial aid, philanthropy, online resources and education.
    - Strategy 4 - Cultivate a commitment to high-quality, new and innovative learning experiences in all courses, curricula and co-curricula.
- Goal 2 - Foster Thriving Community
  We will promote and advance a fair, equitable and accessible environment to enable all members of the campus community to make a living, make a life and make a difference.
    - Strategy 3 - Create a transparent, centralized business operations model that responsibly uses university resources, supports collaboration, and promotes consistency across individual campus units.

These action items have the potential, over time, to support student success and lifelong learning by providing alternative options to traditional textbooks. Boise State has a diverse student population, with over 21% of our undergraduates over the age of 25 (Boise State, 2020). A U.S. PIRG update tied to student basic needs during the Covid-19 pandemic found that access to course materials from traditional publishers and ed tech companies "pose numerous problems for students, such as their lack of instructor flexibility, reliance on a strong wifi connection, and student data privacy" (2020). Supporting affordable learning means supporting students. The LMAA Task Force recognizes that for these Action Items to be successful long-term, we need to empower the Boise State community to engage with affordable learning and associated services consistently across campus, and provide stewardship for the implementation of this action plan.

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Submitted on May 16th, 2022 by Boise State University's Learning Materials Access and Affordability Task Force:

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Individuals

- Mark Damm, Associate Registrar for Systems, Curriculum, and Catalog
- Dr. Pete Koetsier, President, Boise State University Faculty Senate
- Amy Mayton, Coordinator of Scheduling, Office of the Registrar
- Dr. Susan Shadle, Vice Provost for Undergraduate Studies
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Groups

- Associated Students of Boise State University
    - Executive Council: Kenneth Huston, ASBSU President; Sarah Smith, ASBSU Vice President; Amaia Gurricabeitia, Administrative Director; Graf Kirk, Associate Vice President of Academic Affairs; Grace Burgert, Associate Vice President of Inclusive Excellence; Kayla Magana, Associate Vice President of Student Organizational Affairs; Taite Griffin, Ethics Officer; Samantha Muvihill, Government Relations Officer; Eric Kline, Communications Officer.
- Boise State University Deans Group
- Boise State University Faculty Senate
- Open Educational Resources Group

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Appendix A: Current Affordable Learning Services

Service Description	Primary Boise State Service Department / Division	Service Notes
Access to digital course materials (non-OER)	Albertsons Library, Acquisitions & Collections	https://www.boisestate.edu/library/collections/
Access to digitized primary sources	Albertsons Library, Special Collections, Acquisitions & Collections	
Access to government documents	Albertsons Library, Acquisitions & Collections	
Accessibility checks and consultations	Albertsons Library, Scholarly Communications and Data Management, Instruction & Research Services	
Accessibility tools: Ally, Adobe DC Pro, etc.	Learning Technology Solutions	https://boisestate.atlassian.net/wiki/spaces/LTS/pages/92110851/Ally+Basics
Library licensed content adoption & implementation consults	Albertsons Library, Instruction & Research Services, Acquisitions & Collections	
OER adoption & implementation consults	Albertsons Library, Scholarly Communications and Data Management, Instruction & Research Services	
OER grant incentives	Center for Teaching and Learning / State Board of Education	https://www.boisestate.edu/ctl/programs-2/infuse-grant/ https://idaho.pressbooks.pub/opal/

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Service Description	Primary Boise State Service Department / Division	Service Notes
OER publishing platforms: Institutional Repository, Pressbooks	Albertsons Library - Scholarly Communications and Data Management / Learning Technology Solutions / State Board of Education	https://scholarworks.boisestate.edu/ https://boisestate.pressbooks.pub/ https://www.oercommons.org/groups/boise-state-oer/2032/
Online course and program accessibility checks and consultations	eCampus Center, Development and Support Team	
Online OER adoption & implementation consults	eCampus Center, Development and Support team, Research and Innovation Team	
Open access content adoption & implementation consults	Albertsons Library, Scholarly Communications and Data Management, Instruction & Research Services	
Preservation of Boise State created course materials	Albertsons Library, Scholarly Communications and Data Management	https://scholarworks.boisestate.edu/
Workshops and training on accessibility	Center for Teaching and Learning / OIT / Educational Access Center	https://www.boisestate.edu/oit-training/calendar-of-classes/wordpress/ https://www.boisestate.edu/accessibility/accessibility-101/web-content-accessibility-micro-certification-badge/
Workshops and training on copyright	Albertsons Library, Scholarly Communications and Data Management / Center for Teaching and Learning	

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Service Description	Primary Boise State Service Department / Division	Service Notes
Workshops on Open Education	Albertsons Library - Scholarly Communications and Data Management, Instruction & Research Services / Center for Teaching and Learning / eCampus Center / OER Group / State Board of Education	https://open.umn.edu/oen/members

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Appendix B: Sample Assessment Strategies

1. Sample Survey Questions for the targeted survey for High Enrollment Course Instructors:
    - Are you aware of the concept of Affordable Learning Materials?
    - What measures have you taken to investigate the affordability of the instructional materials for your course?
    - What actions have you taken to learn more about how to make your course materials more affordable for your students?
    - Have you ever taken training on Affordable Learning Materials, and if so please describe it?
    - Do you know who to ask regarding, or where to find answers to, your questions regarding affordable instructional materials for your course?

2. Using enrollment data analyze whether courses marked as using Affordable Learning Materials see increased enrollment after adoption and marking the course as such.

    This will require that the marking is clearly explained and will only be able to be measured after a clear marketing campaign that explains what affordable learning means and how it benefits students.

3. Create focus groups of students enrolled in courses designated as using Affordable Learning Materials.

    Create a survey for these focus groups that include questions such as:

    - Did you specifically enroll in this course because of the Affordable Learning designation?
    - Describe your experience using the course materials.
    - What were the advantages/disadvantages of using Affordable Learning Materials?
    - Open discussion on Affordable learning.

    After conducting these focus groups, use the feedback to create a marketing campaign to target both instructors and students. For instructors this campaign would be targeted to help them understand the benefits of adopting Affordable Learning Materials. For the students, it would help them understand how much Affordable Learning benefits them, and how they can know what courses fall into this category.

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4. Data from a single statistics form.

   On a regular basis, pull data from the single statistics form and analyze it for patterns including where instructors are most likely to start their inquiry (the department or person they asked), in what departments the instructors teach in, what kinds of courses the instructors teach, etc.

   Then follow up with instructors to see if their questions were answered and where they are in the process of adopting Affordable Learning Materials.

5. Affordable Learning Materials Adoption Training

   For existing courses that add in Affordable Learning Materials adoption track the participation numbers, the faculty type, college, courses taught, etc. Coordinate with CTL in their existing assessment data, and add in a brief survey with questions specifically geared towards Affordable Learning.

   For new courses or certificates, track the same usage data as above.

   Create a more robust survey including questions like:

   - Why did you decide to take this course?
   - What do you plan to change in terms of instructional materials after taking this course?
   - What do you think the adoption of Affordable Learning materials can mean for student success?

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Appendix C: OER in Tenure and Promotion Resources

Organization Name	Resource Description	Resource Notes
Driving OER Sustainability for Student Success (DOERS3)	Tenure and Promotion Matrix	https://www.doers3.org/tenure-and-promotion.html
Iowa Open Education Action Team (Iowa OER)	Handouts for Advocates and Self-Advocacy	https://oept.pubpub.org/
BC Campus	Making OER Count Webinar	https://bccampus.ca/event/making-oer-count-incorporating-oer-into-the-tenure-and-promotion-process/

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LEARNING RESOURCE AFFORDABILITY PLAN*
COLLEGE OF EASTERN IDAHO
8-17-2022

Introduction

The cost of textbooks has been a longstanding barrier to student access and affordability. According to the Educational Data Initiative website:

- In 2021 students spent an average of $1420 at public two-year colleges.
- Research shows that many students will also avoid buying textbooks, if at all possible.
- In 2020, 19% of students indicated material costs of a class influence what course they take.

As reported by faculty members and those in student affairs, students attending the College of Eastern Idaho sometimes forego obtaining the textbook altogether and attempt to make it through the course without necessary materials. First-generation students may not even be aware that they are required to purchase textbooks and not know the high costs and variability of textbook selection and adoption. Many students attend the first week of classes without textbooks and quickly fall behind.

While national data indicate that the total cost of textbooks has declined since 2016, it remains a barrier. The College of Eastern Idaho is committed to a mitigation of textbook and/or learning resource costs with the end goal of adding several "zero added textbook cost degrees," where students secure their learning resources as a function of their course registration. This will have the effect of:

- Student relief from additional costs of textbooks and other learning resources so there are no "added cost" surprises
- Students will have access to their resources on day one of the course and be fully equipped to succeed
- Equitable access to designated courses/pathways in the schedule, rather than searching for a course with the lowest textbook cost
- Improved access to higher education and student success

While CEI is not subject to Idaho State Board of Education *Policy III.U. Instructional Material Access and Affordability*, which provides the universities guidance and sets expectations, the College has made the commitment to adhere as best it can to the policy in good faith.

Current activity

In Spring 2022, CEI's Office of the Vice President of Academic & Student Affairs requested the formation of a committee with the express purpose of determining how best to gradually move toward the ultimate goal of creating a Zero Cost Textbook Degree. Two employees were selected to co-chair the committee, including a faculty member and an instructional designer with a deep back ground in OER materials. The committee, made up of faculty and staff members, has met and made great progress towards the creation of the degree. All classes have been identified in an Associate of Arts degree. The committee is currently working with the office of the registrar to mark the courses a student would take to obtain an AA degree while expending zero cost towards textbooks.

This analysis not only creates a snapshot of current faculty commitments to keeping costs low but creates a goal or target for the total cost of the initiative. The following are some of the strategies needed to accomplish this goal.

- Faculty dedication and commitment to sensitivity around textbook costs
- Continued deployment of inclusive access
- Use of the CEI Library as a resource
- Institutional support
- Minimal course fees in lieu of textbook purchases
- Development and adoption of open education resources (OER)

The College is currently participating in a new community college statewide OER initiative (Project Z-Degree), which will provide $1 million to be split across the four community colleges, to support this effort over the next few years. However, textbook adoption and selection remains a primary role of faculty, and the institution fully supports this academic freedom right.

Plan

According to policy III.U. the institutional plan is to consist of the following elements at a minimum. For each of the elements, institutional comment is provided.

- *Resources and support to help faculty ensure all instructional materials are relevant and accessible for all students, especially students who require learning accommodations or additional modes of delivery (e.g. a print version of a digital textbook, internet access, etc.).*
    - This is accomplished through institutional program review, outcomes assessment, and textbook adoption processes, along with input from the Student Disability Services.
- *Policies and/or strategies that minimize the cost of instructional materials for students while maintaining the quality of education, the academic freedom and responsibility of faculty and students, and the recognition that the average cost of instructional materials is higher in certain disciplines, and some disciplines require higher cost materials which are used over multiple terms or throughout an entire program.*
    - As stated earlier, the CEI faculty have made these commitments as an inherent function of their positions. However, during the process of textbook adoption and selection review, the College will undertake to reasonably create parameters around selection that are consistent with the language in the policy.
- *Professional development opportunities for faculty and staff related to the discovery, adoption, and use of OER and other affordable instructional materials.*
    - Will be accomplished through the deployment of Project Z-Degree (the community college OER project).
- *Strategies to support faculty adoption, adaption, and/or use of OER and other affordable instructional materials.*
        - Deans and Department Chairs will work with faculty to ensure faculty have the resources and development they need to feel comfortable adopting low cost materials
- *Programs, incentive structures, or other strategies to encourage and support faculty to publicly share OER developed for their own courses.*

- A function of Project Z-Degree including significant collaboration between institutions.

- *Course marking processes at the time of course schedule releases that indicate the cost of instructional materials in course sections that are reliably zero cost or very low cost, as defined in this policy.*
  - Course marking will be deployed as soon as possible within the registrar's office.
- *Strategies with measurable goals for improving and using readily available and relevant OER or other very low-cost instructional materials in common-indexed courses as articulated in Board Policy III.N.6.b., including dual credit courses.*
  - This will be a component of the plans cited above in the first two bullet points as well as those set forth in the conditions of Project Z-Degree, e.g. a zero textbook cost major developed at each Idaho community college.

* Adapted from College of Southern Idaho's Plan

LEARNING RESOURCE AFFORDABILITY PLAN*
COLLEGE OF EASTERN IDAHO
8-17-2022

Introduction

The cost of textbooks has been a longstanding barrier to student access and affordability. According to the Educational Data Initiative website:

- In 2021 students spent an average of $1420 at public two-year colleges.
- Research shows that many students will also avoid buying textbooks, if at all possible.
- In 2020, 19% of students indicated material costs of a class influence what course they take.

As reported by faculty members and those in student affairs, students attending the College of Eastern Idaho sometimes forego obtaining the textbook altogether and attempt to make it through the course without necessary materials. First-generation students may not even be aware that they are required to purchase textbooks and not know the high costs and variability of textbook selection and adoption. Many students attend the first week of classes without textbooks and quickly fall behind.

While national data indicate that the total cost of textbooks has declined since 2016, it remains a barrier. The College of Eastern Idaho is committed to a mitigation of textbook and/or learning resource costs with the end goal of adding several "zero added textbook cost degrees," where students secure their learning resources as a function of their course registration. This will have the effect of:

- Student relief from additional costs of textbooks and other learning resources so there are no "added cost" surprises
- Students will have access to their resources on day one of the course and be fully equipped to succeed
- Equitable access to designated courses/pathways in the schedule, rather than searching for a course with the lowest textbook cost
- Improved access to higher education and student success

While CEI is not subject to Idaho State Board of Education *Policy III.U. Instructional Material Access and Affordability*, which provides the universities guidance and sets expectations, the College has made the commitment to adhere as best it can to the policy in good faith.

Current activity

In Spring 2022, CEI's Office of the Vice President of Academic & Student Affairs requested the formation of a committee with the express purpose of determining how best to gradually move toward the ultimate goal of creating a Zero Cost Textbook Degree. Two employees were selected to co-chair the committee, including a faculty member and an instructional designer with a deep back ground in OER materials. The committee, made up of faculty and staff members, has met and made great progress towards the creation of the degree. All classes have been identified in an Associate of Arts degree. The committee is currently working with the office of the registrar to mark the courses a student would take to obtain an AA degree while expending zero cost towards textbooks.

This analysis not only creates a snapshot of current faculty commitments to keeping costs low but creates a goal or target for the total cost of the initiative. The following are some of the strategies needed to accomplish this goal.

- Faculty dedication and commitment to sensitivity around textbook costs
- Continued deployment of inclusive access
- Use of the CEI Library as a resource
- Institutional support
- Minimal course fees in lieu of textbook purchases
- Development and adoption of open education resources (OER)

The College is currently participating in a new community college statewide OER initiative (Project Z-Degree), which will provide $1 million to be split across the four community colleges, to support this effort over the next few years. However, textbook adoption and selection remains a primary role of faculty, and the institution fully supports this academic freedom right.

Plan

According to policy III.U. the institutional plan is to consist of the following elements at a minimum. For each of the elements, institutional comment is provided.

- *Resources and support to help faculty ensure all instructional materials are relevant and accessible for all students, especially students who require learning accommodations or additional modes of delivery (e.g. a print version of a digital textbook, internet access, etc.).*
    - This is accomplished through institutional program review, outcomes assessment, and textbook adoption processes, along with input from the Student Disability Services.
- *Policies and/or strategies that minimize the cost of instructional materials for students while maintaining the quality of education, the academic freedom and responsibility of faculty and students, and the recognition that the average cost of instructional materials is higher in certain disciplines, and some disciplines require higher cost materials which are used over multiple terms or throughout an entire program.*
    - As stated earlier, the CEI faculty have made these commitments as an inherent function of their positions. However, during the process of textbook adoption and selection review, the College will undertake to reasonably create parameters around selection that are consistent with the language in the policy.
- *Professional development opportunities for faculty and staff related to the discovery, adoption, and use of OER and other affordable instructional materials.*
    - Will be accomplished through the deployment of Project Z-Degree (the community college OER project).
- *Strategies to support faculty adoption, adaption, and/or use of OER and other affordable instructional materials.*
        - Deans and Department Chairs will work with faculty to ensure faculty have the resources and development they need to feel comfortable adopting low cost materials
- *Programs, incentive structures, or other strategies to encourage and support faculty to publicly share OER developed for their own courses.*

- A function of Project Z-Degree including significant collaboration between institutions.

- *Course marking processes at the time of course schedule releases that indicate the cost of instructional materials in course sections that are reliably zero cost or very low cost, as defined in this policy.*
  - Course marking will be deployed as soon as possible within the registrar's office.
- *Strategies with measurable goals for improving and using readily available and relevant OER or other very low-cost instructional materials in common-indexed courses as articulated in Board Policy III.N.6.b., including dual credit courses.*
  - This will be a component of the plans cited above in the first two bullet points as well as those set forth in the conditions of Project Z-Degree, e.g. a zero textbook cost major developed at each Idaho community college.

* Adapted from College of Southern Idaho's Plan

COLLEGE OF SOUTHERN IDAHO

OFFICE OF THE PROVOST

LEARNING RESOURCE AFFORDABILITY PLAN
3.18.2022

Introduction

The cost of textbooks has been a longstanding barrier to student access and affordability. According to the Educational Data Initiative website:

- In 2021, the average cost for full-time, undergraduate students at a four-year university for books and supplies per year was approximately $1240.00, **with students spending the most (average of $1420) at public two-year colleges** compared to $1220 per year at private four-year colleges (average of $450-$625 per semester).
- When possible, nearly **66% of students will avoid buying course materials** due to the steep prices
- In 2020, 25% of students indicated they **worked extra hours** to pay for their books and materials and 11% **skipped meals** in order to afford books and course materials
- In 2020, 19% of students indicated **the cost of materials and books directly influenced their decision on what classes to take**

Anecdotally, we are fully aware that students attending the College of Southern Idaho sometimes forego the textbook altogether and attempt to muddle through the course. First-generation students may not even be aware that they are required to purchase textbooks, let alone know the high costs and variability of textbook selection and adoption. Many students attend their first class sessions without textbooks and get off to a rocky start.

While national data indicate that through various means the total cost of textbooks has declined since 2016, it remains a significant problem. The College of Southern Idaho is committed to a mitigation if not elimination of textbook and/or learning resource costs with the end goal of becoming a "zero added textbook cost institution," where students simply secure their learning resources as a function of their course registration. This will have the effect of:

- Student relief from *additional* costs of textbooks and other learning resources so there are no *added cost* surprises; and
- Students will have access to their resources on day one of the course and be fully equipped to succeed; and
- Equitable access to any course in the schedule, rather than searching for a course with the lowest textbook cost; and
- Improved access to higher education and student success

While CSI is not subject to Idaho State Board of Education *Policy III.U. Instructional Material Access and Affordability*, which provides the universities guidance and sets expectations, the College has made the commitment to adhere as best it can to the policy in good faith, including the specific requirements set forth therein.

Current activity

In 2021 at the behest of the Office of the Provost, an ad hoc committee was formed with the express purpose of determining how best to incrementally move toward the ultimate goal of becoming Idaho's first Zero Added Textbook Cost Institution. Two employees were selected to co-chair the committee, including a member of the CSI Teaching and Learning Center (and former President of the Faculty Senate) and the Director of the CSI Bookstore. Both had been instrumental in the deployment of the *inclusive access*, also known as *automatic charge*, which is a textbook publisher subscription service for digital textbooks as a significant cost saving measure. The committee, made up largely of faculty, has met a number of times and set milestones for meeting the goal as well as quantifying the total financial cost to students.

This analysis not only creates a snapshot of current faculty commitments to keeping costs down but creates a goal or target for the total cost of the initiative. It is quite apparent that it will take multiple tactics to reach the goal, including but not limited to:

- Faculty dedication and commitment to sensitivity around textbook costs (something that is already apparent)
- Continued deployment of inclusive access/automatic charge
- Use of the CSI Library as a resource
- CSI Foundation support
- Institutional support
- Minimal course fees in lieu of textbook purchases
- Development and adoption of open educational resources (OER)

The College is currently participating in a new statewide OER initiative (Project Z-Degree) which will provide $1 million to support this effort over the next few years. However, textbook adoption and selection remains a primary role of faculty and the institution fully supports this academic freedom right.

Plan

According to policy III.U. the institutional plan is to consist of the following elements at a minimum. For each of the elements, institutional comment is provided.

- *Resources and support to help faculty ensure all instructional materials are relevant and accessible for all students, especially students who require learning accommodations or additional modes of delivery (e.g. a print version of a digital textbook, internet access, etc.).*
    - This is accomplished through institutional program review, outcomes assessment, and textbook adoption processes, along with support from and in consultation with the Student Disability Services unit and the Teaching and Learning Center. A review of current textbook adoption processes across departments and programs is planned for the Spring 2022 semester.
- *Policies and/or strategies that minimize the cost of instructional materials for students while maintaining the quality of education, the academic freedom and responsibility of faculty and students, and the recognition that the average cost of instructional materials is higher in certain disciplines, and some disciplines require higher cost materials which are used over multiple terms or throughout an entire program.*

- As stated earlier, the CSI faculty have made these commitments as an inherent function of their positions. However, during the process of textbook adoption and selection review, the College will undertake to create reasonable parameters around selection that are consistent with the language in the policy.
- The College will commit to the creation of institutional textbook selection policy.

- *Professional development opportunities for faculty and staff related to the discovery, adoption, and use of OER and other affordable instructional materials.*
  - Will be accomplished through the deployment of Project Z-Degree (the community college OER project) as well as through the Teaching and Learning Center, library, and other instructional support services.
- *Strategies to support faculty adoption, adaption, and/or use of OER and other affordable instructional materials.*
  - See the first and second bullets above
- *Programs, incentive structures, or other strategies to encourage and support faculty to publicly share OER developed for their own courses.*
  - This is a function of Project Z-Degree including significant collaboration between institutions.
- *Course marking processes at the time of course schedule releases that indicate the cost of instructional materials in course sections that are reliably zero cost or very low cost, as defined in this policy.*
  - Course marking will be deployed as soon as possible, although it is important to point out that CSI is adopting a new Student Information System which may cause a delay.
- *Strategies with measurable goals for improving and using readily available and relevant OER or other very low cost instructional materials in common-indexed courses as articulated in Board Policy III.N.6.b., including dual credit courses.*
  - This will be a component of the plans cited above in the first two bullet points as well as those set forth in the conditions of Project Z-Degree, e.g. a zero textbook cost major developed at each Idaho community college.

COLLEGE OF WESTERN IDAHO

Access Plan for Affordable Instructional Materials

June 30, 2022

According to Idaho State Board President Kurt Liebich, "the 'Z' in Project Z-degree stands for 'zero cost' and the goal is to make it possible for students to earn an associate degree with zero or very low textbook costs." To this end, The State Board of Idaho allocated one million dollars to Idaho community colleges to create at least one Z degrees per institution by 2023. CWI is confident that it can do at least that, and we intend to build on the momentum of instructors who have already been doing a lot of work in this area.

CWI has identified three A.A. degrees to begin as Z degrees in Fall 2023. Our goal is to increase the numbers of Z degrees available to students, to make it clear which courses they take are 0 to low-cost for instructional materials, and to become known as the place students can come to for a high-quality, lower cost degree. As Z degrees become more common at CWI, the affordability for all students will increase.

Even though CWI, as a Community College, is not subject to State Board policy III.U which requires an affordable instructional materials plan, we believe in the merits of this policy and are striving along with our four-year institutions to put a successful plans in place. Along with our Z degree goals, we have commented on the material parts of policy III.U as they relate to our plans to increase access to instructional materials to all students on day one of class with little to no cost to them. Comments are provided in the sub-points below each policy item marked by roman numerals.

a. Plans shall include the following elements:
    i. Resources and support to help faculty ensure all instructional materials are relevant and accessible for all students, especially students who require learning accommodations or additional modes of delivery (e.g. a print version of a digital textbook, internet access, etc.).
        a. As part of our materials accessibility strategy, CWI Library staff and CTL are committed to supporting all CWI faculty who employ OER and other materials in their courses to ensure instructional materials are accessible. This includes 1:1 help as well as existing training on Accessibility of instructional materials.
        b. CTL supports Ally, a tool that works in our Blackboard LMS to allow faculty to ensure that all instructional materials are accessible. CTL has training and a yearly accessibility competition to help faculty improve their instructional materials accessibility score.
        c. The Idaho Legislature's OER funding and support by Merlot ensure a renewed focus on the types of instructional materials faculty employ for

students, encouraging them to take advantage of developing course specific OER for their courses that is both accessible and relevant. Faculty are awarded stipends from this money to help ensure that their instructional materials are relevant and accessible for all students.

ii. Policies and/or strategies that minimize the cost of instructional materials for students while maintaining the quality of education, the academic freedom and responsibility of faculty and students, and the recognition that the average cost of instructional materials is higher in certain disciplines, and some disciplines require higher cost materials which are used over multiple terms or throughout an entire program.

a. The Idaho Legislature's OER funding and support by Merlot ensure resource support for our OER plan through the end of the Fall 2023 academic term. OER is a key strategy for CWI, especially in the General Education courses to ensure students have first day access to instructional materials. We will ensure that there are several full pathways through the Gen Ed designated courses and multiple degrees offered at CWI using strategic funding of stipends for faculty to create OER for their courses in these areas.
b. CWI has created an OER committee that includes members from the Library, the Center for Teaching and Learning, Deans, Department Chairs, faculty with expertise in OER, and the OER coordinator that is overseeing the distribution of stipends for faculty engaging in OER work and training.
c. Already gathered lists of instructional material cost for different courses will be utilized to identify additional 'high cost' textbook courses where instructors might be encouraged to look into more affordable solutions through the role of the OER coordinator at CWI.
d. Work is ongoing with department chairs who use instructional materials with an 'automatic charge' such as IncludED to make sure that they are in disciplines that are appropriate (especially for support in practice in repetitive skills or problem-solving). These types of courses will be included as part of a 'Z degree' initiative for zero to very low-cost instructional materials across the whole range of required courses for degrees at CWI, but only as a last resort because these 'special fees' do raise the cost for any students paying out of pocket for their education.

iii. Professional development opportunities for faculty and staff related to the discovery, adoption, and use of OER and other affordable instructional materials.

a. The Idaho Legislature's OER funding and support by Merlot ensure that resources are available to award faculty stipends who undertake training in best practices in OER through a supported LMS site developed for this

purpose. Faculty training in topics including 'What is OER?'; 'Finding better OER'; 'Creative Commons licensing'; 'How to use Pressbooks'; and 'Accessibility and Universal Design' is currently ongoing and supported through stipends.

b. Where appropriate, department chairs can support those creating OER to showcase their work at conferences both online and in person. Department chairs will be encouraged to make this available to interested and qualified faculty.

iv. Strategies to support faculty adoption, adaption, and/or use of OER and other affordable instructional materials.

a. The Idaho Legislature's OER funding and support by Merlot ensure resource support for up to 40 faculty to identify, adopt and adapt OER for their courses. Strategies include this staged stipend process.

b. Planned in-service meetings starting Fall 2022 where the basics of OER are discussed and opportunities given to faculty to participate in finding and creating OER for their courses.

c. The OER Coordinator has identified degree programs that are closest to a Z degree pathway (3 of these have been positively identified, with several others close to having a Z degree) and will continue persuading department chairs of the benefits of this for students and for their instructors.

v. Programs, incentive structures, or other strategies to encourage and support faculty to publicly share OER developed for their own courses.

a. The State Board of Idaho has provided access for CWI to their own instance of Pressbooks which faculty are encouraged through training in Pressbooks publishing and appropriate stipends, to make their OER available on this site. Along with the 3 titles currently available as of mid-June 2022, there are at least 2 more in production for Gen Ed common numbered courses that will be published in the next few months.

b. Stipends are available to faculty who have significantly altered or created OER to publish their work on the CWI Pressbooks site.

c. Discussions with all community college OER coordinators are ongoing on the best way to share the OER that are being developed at each institution as well as faculty who are involved in this process. This should encourage further collaboration as well as minimize duplication of work in any given discipline area.

vi. Course marking processes at the time of course schedule releases that indicate the cost of instructional materials in course sections that are reliably zero cost or very low cost, as defined in this policy.

a. The CWI OER Committee is currently in discussion with the registrar on ways to use our course management system to not only indicate the sections of

courses that are 0 to very low-cost as well as the Z degrees available at CWI. We hope to have a plan in place for course marking by the Spring 2023 semester.

vii. Course marking processes at the time of course schedule releases that indicate course sections that reliably require the purchase of, including an automatic charge for, any access codes for instructional materials.
   a. See above comment under vi.

viii. Strategies with measurable goals for improving and using readily available and relevant OER or other very low-cost instructional materials in common-indexed courses as articulated in Board Policy III.N.6.b., including dual credit courses.
   a. Goal 1: Utilize the State Legislature's funding to focus the stipend process to develop OER, in coordination with other Community Colleges, for as many common-numbered courses as possible by Fall 2023. A reachable goal would be 50% of common indexed courses across the 4 community colleges.
   b. Goal 2: Utilize the State Legislature's funding to develop as many Z degrees as possible in coordination with other Community Colleges and Merlot who has been provided as our 3rd party solution partner. For CWI, the goal is to develop at least 4 Z degrees by Fall 2023.
   c. Goal 3: By Spring 2022, to identify common indexed courses that are good candidates for OER but ones that CWI faculty have not considered, and make stipends available to dual credit instructors for these courses to develop OER and complete OER training if they are interested. Dual credit instructors will also be made aware of any OER developed for the courses they instruct to use if they wish.

b. Plans may include the following elements:
   i. Course marking that indicates the cost of instructional materials in course sections at time of registration that are low cost, mid cost, and/or high cost, as defined in this policy.
      a. See goal vi.a above
   ii. Strategies with measurable goals for improving and using readily available and relevant OER or other affordable instructional materials in non-common-indexed courses.
      a. In April 2022, calls to interested instructors of common indexed courses, and then all Gen Ed designated courses at CWI went out. After 3 weeks, this call was widened to all courses at CWI. By Fall 2022, additional common indexed courses should be identified in coordination with the other Community Colleges, and a structured call for instructors to develop OER for those courses

should be sent out. This call should, using the same process, be widened to all Gen Ed designated courses at each institution in Spring 2023.

iii. Policies or procedures that encourage faculty to be intentional in selection and use of instructional materials, including ongoing review and reconsideration of required materials.

a. At a period of 2-3 years after the original publishing of course specific OER, faculty who organized/created any published CWI Pressbook content would be asked to revisit their published OER and update as needed, with the awarding of a $500 stipend as an additional incentive for this.
b. Continuing Professional development opportunities around the use of OER will be planned for at least once/academic year by the OER coordinator around the benefits and effectiveness of using OER.

iv. Inclusion of efforts to increase access and affordability of instructional materials as part of tenure and promotion processes.

a. The OER committee will lead discussions with the promotion committee on the best way to notate and acknowledge the work done by faculty in the area of OER and resource accessibility on their yearly reviews and promotion materials.

v. Other elements as determined by the institution.

Idaho State University

Plan to Increase Access and Affordability of Instructional Materials

June 1, 2022

Idaho State University

OPEN EDUCATIONAL RESOURCES
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Idaho State University

Plan to Increase Access and Affordability of Instructional Materials

CONTENTS

INSTITUTIONAL PROCESS 1

ACCESS AND AFFORDABILITY OF INSTRUCTIONAL MATERIALS OVERVIEW 1

STRATEGIES TO INCREASE ACCESS AND AFFORDABILITY OF INSTRUCTIONAL MATERIALS 3

1. Continue to Support Existing OER and Low Cost Resources and Incentives 3
2. Update University Class Registration System to Include Course Markings 4
3. Promote and Support the Inclusion of OER and Affordability Work in Evaluation and Promotion Guidelines 5
4. Identify Courses With High Return on Investment 6
5. Address Common Misconceptions about OER with Instructors and Administrators 7
6. Encourage the Adoption of Affordability Values for Faculty and Administration 8
7. Continue the Proposal-Based Program for Course Material Affordability Projects 9
8. Expand Regular Professional Development Related Course Material Affordability 10

REFERENCES 12

INSTITUTIONAL PROCESS

In response to the expectations set forth by the Idaho State Board of Education Policy III.U. Instructional Material Access and Affordability, Idaho State University (ISU) formed an Open Educational Resources (OER) Committee in September of 2021 to develop a plan to increase access and affordability for instructional materials. This standing committee consists of one faculty member representative from each college as well as representatives from Academic Affairs, the ISU Libraries, the Instructional Technology Resource Center (ITRC), and Faculty Senate. Committee members participated in 10 meetings over the course of the Fall 2021 and Spring 2022 semesters. Additionally, they conducted two surveys to gather foundational OER data. The first survey, distributed to all ISU Instructors in November of 2021, was formed in order to gauge instructor knowledge, interest, and current usage of OER materials. Over 300 instructors responded to this survey. The second survey was sent to all university departmental chairs and program directors in February of 2022. This survey was designed to determine which departments would potentially benefit most from OER initiatives, and included questions which focused on each department's high enrollment courses. Based on the information gathered in these surveys, OER Committee discussions, and feedback from the Faculty Senate, Dean's Council, Leadership Council, Administrative Council and individual faculty from across campus through numerous forums, ISU is submitting the following plan to increase access and affordability of instructional materials for all students.

ACCESS AND AFFORDABILITY OF INSTRUCTIONAL MATERIALS OVERVIEW

Open Educational Resources (OER) are free, openly licensed textbooks and other course materials, and adopting these materials for use in higher education has a powerful effect on student success rates. A recent meta-analysis on OER adoption studies shows that, on average, courses which use open textbooks have a 29% lower withdrawal rate in comparison to courses with commercial textbooks (Clinton & Khan, 2019). Benefits appear even stronger for Pell-eligible, non-white, and part-time students, and may result in grade improvements for these populations (Colvard et al., 2018; Delgado et al., 2019). Notably, adopting OER has been shown to result in learning efficacy comparable to commercial textbooks (Clinton & Khan, 2019; Grinias & Smith, 2020). Instructors generally perceive the quality of their selected OER as at least equivalent to the quality commercial textbooks (Allen & Seaman, 2014).

Recent studies have concluded that the price of course materials can negatively impact student success. A 2018 survey of over 21,000 university students revealed that around 23% dropped, 18% withdrew from, and 17% failed a course because they were not willing or able to purchase course materials (Florida Virtual Campus, 2019). Textbook costs also

limit the number of courses students can afford to take per semester, and may cause them to delay taking certain courses (Florida Virtual Campus, 2019; Martin et al., 2017; Senack, 2014). It is critical that affordable materials are available for Early College classes, and particularly rural high school students, who are highly unlikely to be able to afford textbooks and other learning materials.

Although there is strong evidence in favor of OER adoption as a student success and retention measure, OER is still not widely used in higher education. Unlike previous technological advances in education, however, OER has no entrenched groups of opposition or factions with powerful objections (Allen & Seaman, 2014) so adoption is on the rise (Spilovoy, Seaman & Ralph, 2020). However, barriers to faculty adoption are significant and include:

- lack of time and expertise to search for and evaluate relevant OER offerings;
- low awareness and understanding of OER;
- lack of time to develop or update courses to incorporate OER;
- inadequate institutional resources or support to pursue OER work (Belikov & Bodily, 2016; Seaman & Seaman, 2018); and
- lack of professional recognition for doing so in promotion and tenure processes (Skidmore & Provida, 2019).

When Belikov & Bodily (2016) asked about incentives to overcome these barriers, faculty named more institutional support for OER, such as, course load reduction, research assistance, or monetary compensation. Another necessary incentive is professional recognition: OER work is currently undervalued in higher education, and faculty are reluctant to take on this work out of concern it will not be recognized by evaluation processes or promotion and tenure guidelines (Skidmore & Provida, 2019).

Seaman & Seaman (2020) concluded that faculty who are aware of institutional or state/regional OER initiatives are three to four times more likely to undertake an OER adoption program. OER adoption is frequently financially incentivized by grant programs, including federal, regional, state and institutionally funded grants, and faculty development structures include training opportunities offered by libraries and/or centers for teaching excellence (McGowan, 2020). For example, in 2021, the Idaho Legislature invested $1 million into Project Z-degree. This state-funded initiative was created to help community college faculty transition their courses to low or no-cost course materials, increasing access and affordability for their students. By pursuing similar initiatives, ISU can make these same benefits available to the university's students.

STRATEGIES TO INCREASE ACCESS AND AFFORDABILITY OF INSTRUCTIONAL MATERIALS

This plan offers eight strategies to enhance the use of OER and low cost materials by Idaho State University faculty. These strategies build on programs, resources, and incentives currently in place at ISU and are intended to be continued or launched variously during the Spring 2022 semester and the following academic year. The recommendations focus either on cost minimization or on faculty support and are listed below.

1. Continue to Support Existing OER and Low Cost Resources and Incentives

ISU recently developed two university-wide professional development opportunities related to OER and low cost materials; ISU's Open Education Week and the Program for Instructional Effectiveness (PIE) OER Symposium. Additionally, the University Libraries, the Instructional Technology Resource Center (ITRC), Disability Services, and the Idaho State Board of Education all offer numerous resources and support for faculty in order to increase access and affordability of instructional materials.

The first ISU Open Education Week was held in March 2021 and the second offered in March 2022. This event is intended to be offered as an annual event. It was organized by a committee within ISU University Libraries known as the Open and Affordable Educational Resources (OAER) Committee, made up of both librarians and instructional designers. The week's educational programming has consisted of virtual presentations given by recent Textbook Hero Honorees (see below), and additional educational presentations about discovering OER, using H5P interactive learning software, and OER basics. Videos of the events are available on the ISU Libraries YouTube Channel.

Following the first round of OPAL Fellowship grants awarded by the Idaho State Board of Education, the PIE program hosted a symposium in March 2020 for the ISU fellows to share their experiences. This symposium is intended to be offered on a biennial basis.

ISU University Libraries has provided a Subject Guide for instructors interested in learning more about OER. Topics covered in the guide include OER basics, a beginner's guide to searching OER, resources for creating and adapting OER, and other affordability strategies such as using electronically licensed library materials. The Guide also contains a contact form to request OER search help, a list of previous Textbook Heroes and a link to the ISU Pressbooks catalog of open textbooks. Librarians consult with faculty members to identify existing items in collection whose copyright status and/or licensing terms permit use suitable for a class. Additionally, individual items with Digital Rights Management properties permitting class use are added to the collection where feasible. The University Libraries continues to revise job descriptions where feasible to include Open and Affordable ER support skills and knowledge.

The Instructional Technology Resource Center (ITRC) provides accessibility support for all faculty associated with all of their instructional materials. This support includes captioning of videos and review of instructional documents to assure they are completely

accessible for students through the use of screen reader tools. ITRC supports faculty who are working with students with other vision limitations such as, but not limited to, color blindness or the ability to discern contrasts. These services are purposefully coordinated with online faculty and online courses as part of ISU's Quality Assurance processes, Quality+, also these same services are available to any faculty teaching in any mode, including face-to-face.

In addition to reviewing and assisting with the accessibility of instructional materials, the ITRC staff, along with the Universities Library staff, assist faculty with obtaining digital instructional materials that faculty can utilize legally within their courses or share with their students through ISU's LMS. The ITRC supports faculty as they work to increase access and affordability for instructional materials.

The Disability Services office provides accessibility support for all students with disabilities at all campuses and for those attending classes via distance methods. Support includes but is not limited to transcription services, Braille, large print materials, sign language interpreting, books in etext format with text to speech software, speech to text software, note taking software and other note taking tools, screen and text magnifiers, readers, note takers, and scribes. Disability Services is also the sponsoring organization for ISUPP 1020 - Electronic and Information Technology Accessibility which specifically delineates the expectations regarding accessible instructional materials at ISU.

The Idaho State Board of Education provides the Pressbooks publishing platform for ISU faculty, staff and students. This resource allows the creation and distribution of open educational resources, as well as free materials under traditional copyright. ISU members interested in publishing any materials and making them free online can contact the ISU Pressbooks administrator for an account. The ISU Pressbooks Catalog displays publications created or curated by ISU users that they have chosen to make publicly available on the web.

Timeline and Outcomes:

ISU will continue to offer professional development opportunities, resources, and support for faculty in order to increase access and affordability of instructional materials.

2. Update University Class Registration System to Include Course Markings

Course marking initiatives are projects to update university registration systems by including an indicator of the cost of required materials in their course schedules. These markings can help students plan for textbook costs by allowing a price filtering option within a registration system, so students can select the classes that best meet their financial needs. A number of major universities and university systems in the U.S. have undertaken similar projects, as described in Marking Open and Affordable Courses: Best Practices and Case Studies.

To achieve this, the Idaho State University Office of the Registrar will begin collecting material cost information from departments when they submit their course schedules. They will program the system to display material costs in the course schedule by price bands, and create a search filter on this attribute in the program's user interface. The ISU registration process will utilize the following three definitions developed by Idaho State Board of Education in Board Policy III.U.:

i. "Zero cost" means a total materials list price of $0.
ii. "Very low cost" means a total materials list price of $1-$30.
iii. "Low cost" means a total materials list price of $31-$50.

The ISU registration process will further include a course marking process that indicates course sections that require the purchase of any access codes for instructional materials.

Timeline:

The ISU Registrar projects that this project will be completed for registration for the Spring 2023 semester. The implementation will take place during Summer 2022 in order to ensure the system is ready for the Spring 2023 registration process which begins in September of 2022.

Outcomes:

- Course markings will be available and searchable beginning with the Spring 2023 course schedule.

3. Promote and Support the Inclusion of OER and Affordability Work in Evaluation and Promotion Guidelines

Instructors may be reluctant to undertake affordability projects if they do not believe the work will be seen as valuable in evaluation processes or promotion and tenure guidelines (Skidmore & Provida, 2019). To make it feasible for instructors to undertake OER and affordability projects on a widespread basis, this work must be valued by existing faculty evaluation processes.

OER advocates have consistently recommended that these evaluation processes be revised to place more emphasis on affordability work, and have created resources to help universities that wish to follow this path. For example, the Open Education in Promotion, Tenure & Faculty Development Project is one such initiative that provides resources on this topic, including examples of policies at other universities that may begin conversations about how similar policies might be adapted to ISU's needs and environment.

ISU's OER Committee is well positioned to raise these issues in the appropriate venues and share resources related to the inclusion of OER and affordability work in promotion and tenure and evaluation guidelines. Members of ISU's OER Committee will provide educational presentations and other resources to the Faculty Senate, including the Faculty Professional Policies Council (FPPC) and their Promotion and Tenure subcommittee, and they will connect this work to ISU's mission. The OER Committee will make similar

presentations to university deans and department chairs in appropriate venues. Informal follow up conversations will take place as necessary to determine whether any changes in policy are appropriate.

Timeline:

Outreach to Faculty Senate, Faculty Professional Policies Council, Dean's Council, and department chair meetings will begin to take place during the 2022-2023 academic year. Follow-up conversations will be conducted at appropriate intervals to determine whether policies and processes should be updated.

Outcomes:

- Educational materials and resources will be available across campus for those interested in incorporating OER into promotion and tenure and annual evaluation guidelines.
- A minimum of two presentations will be provided to leadership groups each semester in order to determine whether policies and processes should be updated surrounding OER.
- Faculty Senators and departmental leadership will have increased knowledge of OER and affordability benefits, and the resources necessary to incorporate affordability work into university and department-level promotion and tenure and annual evaluation guidelines, should they choose to do so.
- The OER Committee will stay aware of any policy changes related to OER and affordability work in promotion and tenure or annual evaluation guidelines.

4. Identify Courses With High Return on Investment

High enrollment introductory general education courses provide the highest return on investment when OER is adopted. At ISU, data on current OER usage within these courses is extremely limited and incomplete. To ensure a high return on OER funding investments, a helpful first step will be to identify courses where OER projects can be implemented across sections to benefit the most students.

Students take general education and 1100-level courses to satisfy objectives or to try new subjects they have not yet committed to studying. In addition to providing the highest total cost savings, OER projects that target high-enrollment courses with multiple sections can give students the flexibility to try new subjects without committing to high-cost textbooks, many of which are bundled with digital access codes and cannot be resold. (Note: some OER textbooks come with ancillary materials such as slide decks, study guides and test banks, similar to the material available via access code from their commercial counterparts. OpenStax is an example of an introductory textbook publisher that makes ancillary materials freely available to instructors and students.)

At ISU, several successful OER adoptions have occurred at the department level or across multiple sections of high-enrollment courses. Notable OER success stories include a recent department-led update of all Sociology 1101 sections to use an OER textbook, and a similar redesign across all sections of ART 1101.

To identify further opportunities, a survey of department chairs was conducted in Spring 2022 to pinpoint high-enrollment courses within departments that may be candidates for OER use in multiple sections. This survey data will be utilized to target courses and departments for potential OER discussions.

To provide a better understanding of OER usage across campus, higher-quality data collection (e.g., drop/fail/withdrawal rates across disaggregated populations) will occur in conjunction with the new course marking scheme to be implemented for Spring 2023.

Timeline and Outcomes:

- ISU's departmental survey highlighted possible OER opportunities which will provide a high return on investment.
- Institutional Research will gather data on OER usage at ISU to determine current adoption rates and help set benchmarks and goals for future growth.
- Student cost savings from OER usage will be calculated as one measure of OER impact.

5. Address Common Misconceptions about OER with Instructors and Administrators

In a 2021 survey sent out to ISU instructors, 85.76% of respondents (n=309) said that they were either somewhat familiar or very familiar with the definition of OER. However, despite a baseline level of familiarity, many misconceptions about OER remain and were reflected in the open-ended survey comments, and may prove to be obstacles to greater OER adoption at ISU. OER awareness activities at ISU will place a high priority on addressing these misconceptions and should actively provide information addressing them.

Academic Freedom

A common misconception about OER initiatives is that they are an effort to limit the course materials instructors can select. Although OER has many benefits, it is not an appropriate choice for every course. Clearly, there are many courses where traditional commercial textbooks are, and will continue to be, the best choice. ISU instructors must retain their current level of academic freedom to select the best course materials for their students. The goals of OER initiatives at ISU will be to raise awareness of the benefits of OER, and support interested instructors and departments in pursuing OER and affordability projects if they wish to undertake this work.

Efforts to address this misconception will include information about how OER enables academic freedom and pedagogical flexibility, since openly licensed materials can be remixed, changed and updated. OER materials can be updated to be context-dependent and to make materials more inclusive, empowering instructors and increasing representations of diversity in course materials, as described in the "Centering Diversity and Inclusion" chapter of the Iowa State University OER Starter Kit.

Quality Concerns
Another common misconception is that because OER textbooks are low-cost or free, their creators were not compensated for the intellectual work required to create them, and they are subsequently of low quality (frequently expressed as "you get what you pay for"). In reality, many national, state, regional, and institutional grants exist to enable the creation of OER, and many of these grants provide for, and even require, a peer review process to take place once the OER is created. For example, Chippewa Valley Technical College was awarded a grant from the U.S. Department of Education to create their OpenRN nursing OER program, which provides for a peer review process by faculty, deans, industry members, and students.

In addition to messaging efforts, "OER Basics" trainings that address these common misconceptions will be offered on a regular basis.

Timeline and Outcomes:

- Two "OER Basics" trainings will be held over calendar years 2022-2023. OER Basics trainings may incorporate material from the Open Education Network membership provided by the Idaho State Board of Education.
- Faculty surveys and other similar tools will be used regularly to determine the continued presence of OER misconceptions on campus.

6. Encourage the Adoption of Affordability Values for Faculty and Administration

Thus far, OER work at ISU has been pursued by motivated faculty members, librarians, instructional designers, and individual departments. However, widespread adoption of OER in higher education requires not only advocates in the classrooms but also support from university leadership, including the development of a culture that values affordability and "accessibility" in education.

ISU has set forth the need to provide "diverse pathways to retention and graduation through educational preparation, academic and co-curricular opportunities, and extensive student support services" in its designation for Core Theme Two: Access and Opportunity. To facilitate the meeting of this goal and to help meet the desired impact, OER initiatives and events held at ISU must enjoy strong support from university leadership. An active and concerted commitment from ISU leadership to promote such initiatives and events will be a strong aspect of their success.

To increase support for this work at ISU, it is also important to continually promote the successes of existing OER initiatives and projects, which includes measuring and sharing metrics about their impact on students. The Textbook Heroes Honor initiated in 2020 by the Universities Libraries and their Open and Affordable Educational Recourses (OAER) Committee is an example of recognizing faculty for their OER accomplishments, however, limited data have been gathered on the impact of OER projects to date. ISU's

Institutional Research department is well positioned to gather data on the impact of affordability projects, and will regularly measure and report on the impacts such projects have on students.

Timeline and Outcomes:

- Education and resources about the benefits of OER will be made widely available to faculty and those in leadership positions.
- Two "OER Basics" trainings will be held over calendar years 2022-2023. An OER Basics training may incorporate material from the Open Education Network membership provided by the Idaho State Board of Education.
- ISU's Institutional Research will track student outcomes for courses that adopt OER or undertake affordability projects on a semesterly basis, and report the disaggregated data for drop/fail/withdrawal rates and other key metrics as appropriate.
- Tools such as surveys will be used to determine the adoption of affordability values in ISU leadership and instructors.
- Outcomes of OER initiatives, including data on student impacts, will be widely shared and presented to university and faculty leadership annually, to increase the profile of OER work on campus.

7. Continue the Proposal-Based Program for Course Material Affordability Projects

OER and course material affordability programs frequently follow a proposal-based model in which instructors apply for funding and professional development resources to enable them to complete their proposed projects. This type of model allows the flexibility to accommodate different types of projects, while directing funds to projects which will most benefit students according to the program's stated goals and chosen evaluation criteria. A proposal-based model allows interested instructors to maintain control over how they approach their affordability project, while ensuring they receive adequate university support to complete their project.

Faculty grant programs are a common method of incentivizing affordability projects (McGowan, 2020) and similar programs already exist at institutions within Idaho, such as the University of Idaho's Think Open Fellowship, Boise State's OER Support Grants program, and the Idaho State Board of Education's OPAL grant program. Numerous resources exist within the OER community to provide guidelines for the development and management of proposal-based affordability grant programs.

ISU Academic Affairs has provided funding for 10 affordability stipend awards for the completion of affordability projects for the 2022-2023 academic year. The proposal process takes advantage of existing proposal and monetary award processes already in place at ISU's Instructional Technology Resource Center (ITRC). According to results of a survey conducted at Idaho State University in Fall 2021, ITRC assistance with course

redesign is one of the most highly requested professional development opportunities related to OER, which made the ITRC a natural choice to administer this program.

To raise the profile of affordability work at ISU, successful applicants are expected to give a brief presentation at the ISU Open Education Week events to be held annually in the first week of March. Further details about this program, including applicant requirements and project evaluation criteria, can be found in appendix A of this report.

Timeline:

Ten affordability grants were allotted to ISU faculty in Spring 2022 for an affordability project to be implemented in a course taught Fall 2022 and/or Spring 2023. Successful applicants will give a presentation at ISU Open Education Week in March 2023.

Outcomes:

- The ISU Affordability Grant Program intends to continue to award a minimum of 10 grants on an annual basis.
- Metrics will be collected to measure the success of the program, which may include data on total student cost savings, increased awareness among faculty, improved course material accessibility, and other pedagogical benefits related to OER adoption.

8. Expand Regular Professional Development Related Course Material Affordability

Increased awareness of OER initiatives has been shown to increase OER adoption rates among faculty (Seaman & Seaman, 2020). One way ISU can raise the awareness level of OER on campus is to provide regular professional development opportunities and proactively market them at the university, college, and department level.

In Fall 2021, ISU's OER Committee surveyed faculty members about their biggest professional development needs related to OER. Based on these survey results, the top professional development opportunity of interest was assistance with OER discovery (searching for OER relevant to their courses and disciplines).

Within Idaho State University Libraries, the Open and Affordable Educational Resources (OAER) Committee has established the annual ISU Open Education Week. This provides an opportunity for University Libraries, the Instructional Technology Resources Center (ITRC), and the Program for Instructional Effectiveness (PIE) to offer professional development opportunities in conjunction with this event, as well as regularly throughout the year.

Timeline and Outcomes:

- Professional development opportunities will be held annually at ISU and will be widely promoted.

- At least one professional development opportunity related specifically to OER discovery will be offered annually through the Program for Instructional Effectiveness (PIE) at ISU.
- The ISU Open Education Week event will be held annually to promote OER awareness and may be held in conjunction with professional development opportunities related to OER. The event will continue to be held the first week in March to coincide with global Open Education Week.

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Idaho State University

Lewis-Clark State College – OER / Low-Cost Course Materials Report
6.22.2022

Introduction

This brief report describes Lewis-Clark State College's efforts surrounding the Idaho State Board of Education's *Policy III.U Instructional Materials Access and Affordability*. At LC State, due to the makeup of our student population, we have been engaged in practices associated with access to affordable materials long before the State Board policy was instituted. Some of the common practices included (and still include):

- Using available OER materials for courses
- Design and implementation of OER has been accepted as evidence of scholarship or teaching excellence as part of annual performance review and the tenure / promotion processes
- Deliberately using older editions of textbooks that were attainable at much lower cost to students
- Using the same textbook for a sequence /series of courses (i.e. - SPAN 101, 102, 201, and 202 or BIOL 227 and 228)
- Hosting informal textbook exchange libraries in the lobbies of the Nursing and Science buildings

With the advent of policy III.U, the College has expanded its efforts, particularly focused OER / Low-cost efforts on General Education Core classes, and is now tracking OER / Low-cost implementation on an annual basis. As a consequence, our tracking data shows the following results:

- We survey annually our General Education Core offerings (from the six State Board of Education policy-defined areas/ways of knowing).
- 27.7% of our General Education Core course sections are offered with OER materials or at no cost to students
- Another 34.4% of the sections offered fall into the low-cost category (defined as costing between $10 to $50.
- See appendix (below) for complete listings and results.

Plan

LC State's plan is to fully comply with the stipulations which are outlined in policy III.U. The institutional plan is to consist of the following elements at a minimum. For each of the elements, institutional comment is provided.

- *Resources and support to help faculty ensure all instructional materials are relevant and accessible for all students, especially students who require learning accommodations or additional modes of delivery (e.g. a print version of a digital textbook, internet access, etc.).*
    - This is being accomplished through a variety of partnerships and resources. These include our campus bookstore, Library, Center for Teaching & Learning, e-Learning Services, and Accessibility Services.

- Workshops are being provided on a regular basis hosted by the CTL and/or e-Learning services.
- These resources are introduced to all new faculty as part of our *New Faculty Orientation* program.

- *Policies and/or strategies that minimize the cost of instructional materials for students while maintaining the quality of education, the academic freedom and responsibility of faculty and students, and the recognition that the average cost of instructional materials is higher in certain disciplines, and some disciplines require higher cost materials which are used over multiple terms or throughout an entire program.*
  - LC State administration and faculty have made this commitment.
  - Textbooks and materials selections are reviewed by programs and divisions each year.
  - The Provost's Office will work with faculty leadership to create a student-centered institutional textbook selection policy.
- *Professional development opportunities for faculty and staff related to the discovery, adoption, and use of OER and other affordable instructional materials.*
  - LC State has been actively involved in funding and supporting OER implementation efforts by faculty.
    - As mentioned above, regular training and workshops are offered by e-Learning and the CTL.
    - The Dean of Liberal Arts & Sciences offered GEM-TRAC mini-grants to faculty to develop OER / Low-cost options for Gen Ed courses.
    - Participation of 3 different faculty members in the statewide OPAL Fellows program (sponsored by the OSBE).
    - Support for faculty travel and participation in OER-themed conferences.
    - Sabbatical support for faculty OER projects.
- *Strategies to support faculty adoption, adaption, and/or use of OER and other affordable instructional materials.*
  - See above:
    - Regular trainings.
    - GEM-TRAC mini-grants.
    - OPAL Fellowship participation.
- *Programs, incentive structures, or other strategies to encourage and support faculty to publicly share OER developed for their own courses.*
  - See above:
    - CTL & e-Learning support / trainings.
    - GEM-TRAC mini-grant participants included faculty from 11 separate General Education Core courses. Nearly $20,000 has been spent since 2018 on these projects which have included:

- Purchasing textbooks for HUM 150, HIST 101 & 102, and ENGL 261 and establishing a lending library in partnership with the LC State Library.
- Creating OER curriculum from scratch for COMM 204 and MUS 101.
- Creating an online course shell (using Canvas) for ENGL 101 & 102 that is accessible to all first-year composition instructors. It is outfitted with complete course templates using OER materials. Instructors also freely add in their own materials to share.
- Creating OER resources/materials for NS 150, ENGL 175

▪ OPAL Fellow participation in ENGL 101, MATH 153, and ECON 201/202 over $11,000 of support funding.

- *Course marking processes at the time of course schedule releases that indicate the cost of instructional materials in course sections that are reliably zero cost or very low cost, as defined in this policy.*
  - This is something that we are currently working on with the Registrar.
  - We have built, in partnership with our campus bookstore, links to required course materials for every class that is listed in the course registration system. Students can look, prior to signing up for a class, what the required materials will be (including if no materials are required).
- *Strategies with measurable goals for improving and using readily available and relevant OER or other very low-cost instructional materials in common-indexed courses as articulated in Board Policy III.N.6.b., including dual credit courses.*
  - The focus of our efforts over the past three to four years has been to increase OER and low-cost option in our General Education Core areas, which specific attention paid to the common-indexed courses.
  - The latest tracking data is provided below in an appendix that shows OER and Low-cost options in relation to our entire Gen Ed Core offerings.
  - LC State's current dual-credit course model does not require high school students taking courses at their own high school to purchase additional materials. Students are either supplied the texts/materials by their high school or through cooperation of our Early College Programs office.

Appendix:

Tracking data for 2020-21 of OER and Low-Cost sections offered of all General Education courses from the six State Board of Education policy-designated ways of knowing Core areas.

Course	#Sections	# OER or No-Cost Sections	# Low ($10-$50) Cost Sections	Comments
ART 100	5	0	0	
COMM 101	4	0	4	
COMM 203	2	0	0	
COMM 204	16	3	9	
ENGL 101	26	22	4	
ENGL 102	21	9	8	
ENGL 175	8	0	2	Requires a number of classic texts
ENGL 257	2	0	1	Requires a number of classic texts
ENGL 258	3	0	2	Requires a number of classic texts
ENGL 261	1	1	0	Requires a number of classic texts
HUM 101	3	0	1	
HUM 150	2	2	0	
MUS 101	2	0	0	
MUS 102	0			
MUS 150	0			
MUS 151	0			
NP 101	1	0	1	A packet created by the professor
NP 102	1	0	1	A packet created by the professor
SPAN 101	7	0	0	Same textbook is used for SPAN 101 --
SPAN 102	3	0	0	-- SPAN 102, 201, & 202
THEA 101	6	4	0	
MATH 123	2	1	1	
MATH 130	0			
MATH 143	3	0	0	
MATH 147	1	0	0	
MATH 153	10	3	0	
MATH 170	2	0	0	
MATH 253	0			
MATH 257	1	0	0	
BIOF 100	1	0	0	

BIOL 100	0			
BIOL 120	1	0	1	
BIOL 123	0			
BIOL 175	1	0	0	
BIOL 227	6	0	0	
CHEM 100	0			
CHEM 105	11	2	4	
CHEM 111	4	2	2	
CS 108	2	0	0	
FSCI 101	0			
GEOL 101	2	0	2	
GEOL 120	0			
GIS 271	1	0	1	
NS 140	1	0	0	
NS 150	3	1	2	
NS 174	2	0	0	
PHYS 111	1	0	0	
PHYS 112	1	0	0	
PHYS 171	2	0	2	
PHYS 205	1	1	0	
PHYS 211	1	0	0	
ANTH 102	6	6	0	OER text used
ANTH 120	1	0	1	
ANTH 170	1	1	0	No cost non-OER materials assigned
GEOG 102	2	0	2	
HIST 101	3	3	0	All sections have no cost checkout from library
HIST 102	3	3	0	All sections have no cost checkout from library
HIST 111	5	0	5	Most students can purchase used texts for under $10
HIST 112	1	0	1	
POLS 101	3	0	0	2 texts required; each is under $50 but combined are about $59
POLS 237	0	0	0	No sections offered AY20-21
POLS 285	1	0	1	
PSYC 101	6	0	6	
PSYC 205	11	0	5	
SOC 101	6	0	6	Older edition used which commonly retails between $10 and $35

North Idaho College

Institutional Plan for Implementation

Idaho State Board of Education // III.U. Instructional Material Access and Affordability

OVERVIEW + PROGRESS

When the *Project Z-Degree* initiative was announced by the Idaho State Board of Education in June of 2021, the *Assistant Dean of Instruction*, Gail Ballard, convened a small sub-group of staff from the library and eLearning in FA21 to discuss support and next steps at North Idaho College (NIC). This group consisted of the *Director of eLearning*, Thomas Scott, and *Public Services/Collection Development Librarian*, Brian Seguin as well as other faculty who had or were shifting course materials to lower cost options. The initiative overlapped with a significant leadership change at the college. However, the work that Gail invested in building a foundation for this project's success at NIC cannot be overstated. During this transitional period, she networked and identified interested parties in the faculty body, collected information about current OER use that, combined, ultimately led to the suggestion of two associate Z-Degree pathways for the college.

In April of 2022, Brian Seguin, was identified by the Provost and Dean of Instruction as the institutional/project lead for the Z-Degree initiative. Externally, he is meeting every other week with the MERLOT team to pose questions in support of implementation. Similarly, he attends the SBOE's Open Education Office Hours Zoom meetings hosted by Jonathan Lashley. This group is comprised of participants from other higher education institutions in the state. The group includes colleagues from the College's eLearning department and Office of Instruction.

Internally, the Project Lead has met separately with the Provost and Dean of General Studies to confirm support of the funding model proposed by CWI which was officially adopted in May of 2022.

Since April of 2022, the following has been accomplished:

- *Project Lead identified (Brian Seguin).*
- *'Project Z Degree' briefly introduced during the May Faculty Assembly meeting and petitioned those with interest in converting to OER options to contact the Project Lead directly. 'Project Z' will be discussed again at either the August or September 2022 meeting.*
- *Project Lead met with key stakeholders in April and May to discuss vision, scope, and barriers.*
- *Project Lead created a survey to solicit interst from colleagues in joining an OER Workgroup. Lead will coordinate meetings in late May 2022.*
- *Project Lead has met with the Natural Sciences Division Chair to discuss the adoption and development of materials to support all BIOL 100 courses at NIC.*

PLAN FOR IMPLEMENTATION

As outlined by policy *III.U.* the College's plan for implementation is as follows:

- *Resources and support to help faculty ensure all instructional materials are relevant and accessible for all students, especially students who require learning accommodations or additional modes of delivery (e.g. a print version of a digital textbook, internet access, etc.).*
  - This will be accomplished through coordination with *Disability Support Services* and the Accountant of *Auxiliary Services*. Currently, the college's contract with the bookstore service provider, Follett was renewed through 2022-23 but it is unclear who the provider will be for 2023 and beyond.
- *Policies and/or strategies that minimize the cost of instructional materials for students while maintaining the quality of education, the academic freedom and responsibility of faculty and students, and the recognition that the average cost of instructional materials is higher in certain disciplines, and some disciplines require higher cost materials which are used over multiple terms or throughout an entire program.*
  - The College does not have a textbook selection policy and respects faculty's freedom to choose course materials that best supports learning in the classroom. The Project Lead and OER Workgroup will work to provide introductions to OER and other learning opportunities through workshops and resources (OER research guide) to make faculty aware of the availability and benefits of adopting low-cost materials.
- *Professional development opportunities for faculty and staff related to the discovery, adoption, and use of OER and other affordable instructional materials.*
  - PD opportunities will be available through the MERLOT group and state funding for *Project Z-Degree*. Additionally, as mentioned above, workshops will be developed and made through collaboration between the library, eLearning, and the *Teaching and Learning Center* (TLC).
- *Strategies to support faculty adoption, adaption, and/or use of OER and other affordable instructional materials.*
  - In addition to workshops focusing on introducing and adopting OER, the Project Lead hopes to identify early-adopter faculty to participate in conversations about implementation to help promote the benefits to colleagues and share information to improve efficiency when adopting/adapting/developing.
- *Programs, incentive structures, or other strategies to encourage and support faculty to publicly share OER developed for their own courses.*
  - The *Project Z-Degree* funding model that was adopted points to scalable funding for implementation. Additionally, the College has discussed honoring achievements at the end of the academic years through an award. This will be discussed further.
- *Course marking processes at the time of course schedule releases that indicate the cost of instructional materials in course sections that are reliably zero cost or very low cost, as defined in this policy.*
  - Course marking will be discussed and coordinated with the College's Registrar and I.T. department. Target rollout date is SP22.
- *Strategies with measurable goals for improving and using readily available and relevant OER or other very low-cost instructional materials in common-indexed courses as articulated in Board Policy III.N.6.b., including dual credit courses.*
  - The initial review and assessment of material to be implemented will be done by the Project Lead. Future evaluations with regard to currency/relevance will be defined.

CONCLUSION

The evidence outlining the impacts of OER and low-to-no-cost course materials continues to grow. The positive impact on student retention and reducing the financial insecurities that many community college student populations experience is clear. Anecdotally, NIC library staff have noted the demand for course reserve materials is greatest in the first five weeks of a semester when required textbooks are often backordered or unavailable. At the least, offering low-to-no-cost materials through this period of time could have a significant impact on retention rates.

The Project Lead will continue to document and assess progress, collaborations, and adoption of OER at NIC and will suggest changes or pivots as necessary. NIC is eager to support *Project Z* and will be working towards offering Associates Degrees in *General Studies* and *Education*.

University of Idaho Institution Plan for Instructional Material Access and Affordability

The University of Idaho vision is to "expand the institution's intellectual and economic impact and make higher education relevant and accessible to qualified students of all backgrounds". To help realize this vision two key objectives in our 2016-2025 Strategic Action Plan are to:

1. Provide greater access to educational opportunities to meet the evolving needs of society**.**
2. Create an inclusive learning environment that encourages students to take an active role in their student experience.

This plan for instructional material access and affordability is designed to contribute to the accomplishment of these objectives. In addition, the plan fulfills the Idaho State Board of Education's requirement that each institution develop and implement a plan to increase access and affordability of instructional materials for all students (Governing Policies and Procedures, Section III.U.).

Units that play central roles in the implementation of this plan include, among others:

- Center for Center for Disability Access and Resources (CDAR, Amy Taylor, Director and Eric Matson, Assistive Technology Specialist)
- Center for Excellence in Teaching and Learning (CETL, Brian Smentkowski, Director)
- Information Technology Services (ITS, Dan Ewart, Chief Technology Officer)
- Office of the Provost & Executive Vice President (Torrey Lawrence, Provost & Executive Vice President)
- Office the Registrar (Steven Stubbs Assistant Registrar)
- University of Idaho Library (Marco Seiferle-Valencia, Open Education Librarian)
- University Teaching Committee (UTC)

i. Resources and support to help faculty ensure all instructional materials are relevant and accessible for all students.

   a. University of Idaho Library (See: Appendix A)
      - The Library is a skilled and practiced partner in securing print and digital copies of course materials and has significant experience providing instructional materials across all modes of delivery. The Library is working with the Center for Disability Access and Resources, the unit on campus which coordinates and administers learning accommodations, to explore additional options for streamlining and integrating the process of making accessible course materials more widely available.
      - In 2021, the Library received a $75,000 ARPA Grant to fund a pilot program to provide temporary internet access in the form of loanable wi-fi hotspots as well as provide high quality laptops. In addition to this program, the Library offers Chromebooks through the Gary Strong Curriculum Center in the College of Education. These programs will need sustained funding to continue indefinitely.

- Leganto: The Library's integrated course reserves platform that helps make course materials more accessible to students. Embedded directly into each Canvas course and connected to the library's resources, Leganto allows instructors to easily create and customize reading lists, so that students can access all their course materials in one place. Source
    a. Leganto workshop video,
    b. Curating a reading list guide, or
    c. Contact libreserve@uidaho.edu for personalized help
    d. Leganto FAQs

b. Center for Disability Access and Resources (CDAR)
- CDAR created (and will maintain) a checklist to assist faculty with the task of building accessibility into a course. The objective is to increase the number of courses that start each term with course content and processes that meet published standards for accessibility, outlined in the Web Content Accessibility Guidelines (WCAG) 2.0. While the focus of the guidelines is web content, the industry applies these standards to all digital content. CDAR's checklist is an easy to read, short checklist of common accessibility-related areas that should be designed into each course. By building in content and processes that meet the standards we can develop a culture of proactively designing courses with accessibility in mind, rather than a more reactive approach to making adjustments to courses after a term has begun. Key areas included on the checklist are such things as PDF's with searchable text, word documents with headers, images with alt text, videos captioned or with auto transcriptions enabled, hyperlinks properly labeled, font style & size, color contrast, and organization/layout.
- There are many resources available with respect to digital content. In addition to the checklist CDAR is working with CETL to create additional targeted guides for each item on the checklist that draw upon these resources.
- CDAR and CETL routinely offer workshops for faculty on making courses more accessible. For example, "From Our Perspective, a Student Panel on Creating Accessible, Inclusive Classes", March 31, 2022.
- When a textbook is required for a course and that textbook has been ordered from the bookstore, CDAR will know of the requirement prior to the start if the semester. The same is not yet true of instructional material that is not distributed through the bookstore (e.g., OER, journal articles). The plan is to add an "instructional material type" attribute to the Course Leaf Section Scheduler (CLSS) that would prompt CDAR to be aware that a course will include non-textbook materials. CDAR benefits from knowing, prior to the beginning of a semester, the type of instructional material (e.g., textbook, journal articles), if not the specifics of such material (e.g., specific articles) that is planned for each course. Knowing the types of instructional materials gives CDAR a heads up on what to anticipate.

c. Awareness building about available resources and support
- A critical step for developing a culture that is mindful of accessibility standards and practices is increasing awareness of the benefits of meeting the standards and an

awareness of available resources. The key units mentioned at the beginning of this plan will implement ongoing, coordinated messaging with respect to accessibility-related goals and practices to faculty, staff, students, and other stakeholders across digital and traditional channels.

ii. Policies and/or strategies that minimize the cost of instructional materials for students while maintaining the quality of education.

a. Library
- The Library provides strategies in the form of specific content recommendations, such as identifying suitable Open texts per instructor request and support for innovative instructional design via the development of unique digital web spaces. The Library's expansion to a more integrated course reserves system (Leganto) allows faculty using the system to have total control of designing their course material reading lists while providing a zero-cost course to students. The Library has prioritized strategies that allow for faculty to retain total academic freedom and discretion, versus pushing a particular vision or ideology of Open.

b. Center for Excellence in Teaching and Learning
- In collaboration with the University Teaching Committee and ITS, CETL will administer a bi-yearly (i.e., Sept/Feb) survey of faculty about technology use by course and section. Results of the survey will be shared bi-yearly (i.e., Nov/April) prior to the time when instructional-materials decisions are made for the upcoming term. Collecting and then sharing information about technology tools in each course and section will help units and faculty see areas for collaboration or common use of technology across courses. For example, if an individual faculty member sees that other courses in their unit are using Tableau (i.e., a visual software) they may choose to use Tableau in their course rather than an alternative visualization software.
- A draft of the questionnaire is included in Appendix C.

iii. Professional development opportunities for faculty and staff related to the discovery, adoption, and use of OER and other affordable instructional materials.

a. Library
- Professional development opportunities created by the Library include workshops and programming on both OER and Open, and more recently on using Leganto and Course Reserves, as well as more intensive opportunities like the Think Open Fellowship Program. The Library is allocating additional library faculty time to dedicated Open programming to expand our outreach, partnership, and workshop offerings.

b. Awareness building about professional develop opportunities, resources, and support
- Increase awareness of OER-related development opportunities through integrated communication efforts. The key units mentioned at the beginning of this plan will implement ongoing, coordinated messaging with respect to OER-related resources and practices to faculty and staff across digital and traditional channels.

- Communicate opportunities for learning more about OER and collaborating with others working to incorporate more OER materials at their institutions. Opportunities such as: Open Education Week and Idaho Open Education Week Symposium.

iv. Strategies to support faculty adoption, adaption, and/or use of OER and other affordable instructional materials.

a. Library
- Our primary strategy to support faculty use of affordable instructional materials has centered around our two main programs that support this goal: Think Open Fellowships and Leganto course reserves. Think Open Fellowships support more intensive materials development as needed and result in a zero-cost course materials list with supporting syllabus. Leganto course reserves helps transition an established student cost savings system, physical reserves and e-reserves, into a more integrated and usable system that blends with the LMS. Leganto course reserves is highly scalable and doesn't demand that faculty necessarily switch to an open text, as licensed materials can be made digitally available to students.
- Develop a guideline to educate faculty, staff, and students to be aware of how we can use and share OERs and materials from other library sources. Sometimes, it is hard to know if we can share an article with the students as we do not know if this violates the copyright policy.

b. Awareness building about available OER-related strategies
- Increase awareness of strategies for OER adoption, adaption, and use through integrated communication efforts. The key units mentioned at the beginning of this plan will implement ongoing, coordinated messaging with respect to OER-related resources and practices to faculty and staff across digital and traditional channels.

v. Programs, incentive structures, or other strategies to encourage and support faculty to publicly share OER developed for their own courses.

a. Library
- This is an area under development at the Library. Currently some materials created by Think Open Fellows are hosted on the OER sharing platform OERCommons, where we have a Library Group Space. The Library is also building out the University of Idaho PressBooks space mentioned elsewhere in the plan.
- Think Open Fellowship Program: Fellowships allow faculty and graduate students to identify and create openly licensed materials that increase quality representation and inclusion of people from marginalized identities. Source

b. CETL
- The plan is to add a "willing to share?" attribute in the questionnaire (Appendix C) of the bi-yearly technology-use survey to ask faculty if they have OER that they would be willing/able to share. Affirmative responses will be included in subsequent report to faculty.

vi. Course marking processes at the time of course schedule releases that indicate the cost of instructional materials in course sections that are reliably zero cost or very low cost.

a. Registrar's Office
   - A "cost" attribute will be added to Course Leaf Section Scheduler (CLSS), and a description of the cost categories will be added to the CLSS user's guide (i.e., "Zero cost" means a total list price of $0, "Very low cost" means a total list price of $1-$30, "Low cost" means a total list price of $31-$50, "Mid cost" means a total list price of $51-$100, "High cost" means a total list price of more than $100 .
   - Data entry will be the responsibility of the unit administrator.
   - Cost designation for each course will be displayed on the semester schedule (FSH 4610). One decision that is still to be made, is the prominence of the cost information, relative to other information about each course that students need/want in order to make decisions.

vii. Course marking processes at the time of course schedule releases that indicate course sections that reliably require the purchase of, including an automatic charge for, any access codes for instructional materials.

a. Registrar's Office
   - The process will be the same as the one mentioned in the previous section.
   - Data entry will be performed by the unit administrator.
   - Designation of any requirements (e.g., purchase an access code) will be displayed on the semester schedule (FSH 4610). As with the cost designation, a decision that is still to be made is the prominence of the information, relative to other information about each course that students need/want in order to make decisions.

viii. Strategies with measurable goals for improving and using readily available and relevant OER or other very low-cost instructional materials in common indexed courses, including dual credit courses.

a. Library
   - In the Library's Think Open Fellowships selection criteria, high enrollment common indexed courses are specifically named as projects that are prioritize. Other elements the Library prioritizes include a project's need for sustained support or collaboration with the Library's resources and expertise, as well as projects that represent unique or new contributions to the Open literature or landscape for that discipline

ix. Annual Report – plan for yearly review and report to the Board on the implementation and outcomes of the plan.

a. The format and requirements of this annual report shall be determined by the Executive Director or designee.

Appendix A

Open at the University of Idaho Library

The University of Idaho Library engages Open, Open Educational Resources (OER), and overall student course materials affordability through a combination of direct programming, core library services that reduce student costs, and overall expertise and capacity building. While the Library has always prioritized student affordability as part of our core mission, we formalized this commitment in 2021 by officially recognizing student access and affordability as a key strategic goal for the Library. This commitment is a logical next step of the missions explored by programs like Think Open Fellowships and the Open Access Fund, created in 2017 and 2018, respectively, and recognizes the Library's overall commitment to leading with Open and affordable materials.

Direct Programs

The Library created these programs specifically to engage Open practices on campus. These programs were created and are run by the Library with the direct goal of supporting and increasing Open Access publishing and Open Pedagogy in University of Idaho classes.

Think Open Fellowships:

Think Open Fellowships are one to two semester long fellowships awarded through the Library that support the often intensive work required to transition a course to open or no-cost course materials. This program was started in 2017 and awards 6 fellowships a year with a $1,200 stipend. Think Open Fellows partner with the Open Education Librarian, as well as other faculty librarians, to identify and implement new materials. **To date this program is estimated to have saved students over $500,000 in course materials costs and directly impacted at least 6,000 University of Idaho students.**

Think Open Fellowships demonstrate the wide range of activities that might fall under Open Pedagogy. Some examples include:

- Creation of original digital textbooks such as:
  - ***Integrated Musicianship: Aural Skills*** *– by Miranda Wilson*
    - An Open-Source, interactive, online textbook for college-level music courses.
  - ***Inquiry-Based Music Theory*** by Sean Butterfield and Evan Williamson
    - An Open-Source, interactive, online textbook for college-level music theory courses written and designed by Sean Butterfield and Evan Williamson.
- Adoption of existing Open textbooks such as:
  - A Physics OpenStax Think Open Fellowship project developed by PhD student Russ Miller: learn more **here.**

- Creation of OER for K-12 classrooms and College of Education undergraduate courses such as:
    - Rebekka Boysen-Taylor's **Teaching Anna Murray Douglass** lesson plans
    - Janine Darragh's trauma-informed ESL **lesson plans**, created for use in Nicaragua and Syria and shared in 2021 with students at Central American University, Managua, Nicaragua.

Open Access Publishing Fund:

The Open Access Publishing Fund (OAPF) provides at least $30,000 per year to researchers at U of I to publish in Open Access journals. **Over the last three years, the OAPF has funded over $145, 000, resulting in publication of 99 fully Open Access journal articles, supporting over 170 authors and researchers across six colleges.**

This annual fund is administered and directed by the Library and funded by the Library, the Provost's Office, and the Office for Research and Economic Development. While Open Access journals by definition provide their journal contents free of charge, these journals frequently pass the publishing costs along to authors through article processing charges (APC). The OAPF awards grants of up to $2,000 to cover these costs, on a first come first serve basis, with the main requirement being that the intended journal be officially listed in the Directory of Open Access Journals. This is a popular program that frequently dispenses all funds to researchers and scholars within a few weeks of opening.

Supporting Open Access models of publication demonstrates that U of I embraces equity of access, which is a catalyst for increased impact and visibility throughout the state, nation, and beyond.

Pressbooks Open Repository:

Pressbooks is an Open textbook publishing system/platform. The University of Idaho has an instance in-development, which is currently overseen by the Open Education Librarian and the Vice Provost for Academic Initiatives. This repository is still under development, but is paid for by the state and is intended as a space to hold Open texts created at the University of Idaho. The University of Idaho instance can be found here.

For an example of what other institutions in the state are doing check out:

Boise State University

Idaho State University

Idaho Open Publishing

Faculty can use our UI Pressbooks platform to easily remix any existing Open text created on the Pressbooks platform and contact the Library for support developing, remixing, or using content in Pressbooks.

Indirect Programs

These programs support the overall goal of lowering students course materials costs but through a different mechanism than using an Open text. These options allow for restricted materials to be accessed free of cost, with certain requirements on the conditions of access such as number of users, formats, and locations.

Leganto/Course Reserves:

In 2021 the Library launched a new course reserves system, Leganto, which features enhanced options for integrating course reading lists directly into BBLearn or Canvas. This new system allows for instructors to opt into having a library reading resource list, where they can easily add new content. Once items are selected, the list is submitted to Library personnel who can then secure appropriate permissions including connecting with Liaisons for potential purchasing of e-licenses. Students get the benefit of having one central location for a course's materials - materials on the web appear right alongside Library access articles and eBooks. Professors can also design a course that uses partially open materials as well as licensed materials in a Leganto reading list, all appearing to the student in one easy to access course materials list embedded in the classes Canvas installation. **We estimate that on average course reserves saves University of Idaho students $385,000 a year.**

Student Driven Course Reserves:

Unlike traditional course reserves which are directed by teaching faculty, Student Driven Course Reserves allow students to request a particular text be purchased by the Library and placed on course reserves. This allows for students to put supplemental materials on reserve, reducing their textbook costs.

Controlled Digital Lending:

Controlled Digital Lending (CDL) allows for previously inaccessible texts to be made available in digital format, provided that specific requirements are met. At a minimum, to be eligible for CDL, an item must not have an e-license readily available for institutional purchase. Once an item is digitized, it can only be offered with particular restrictions (usually a limited number of digital seats to access to the item as well as possible time and location restrictions). Most items will not be eligible for CDL because they will have an e-license available, but this can be a viable option for select texts. This is a new program launched in 2021.

Liaisons as Open partners:

The Library liaisons program pairs each college with its own library faculty member, who provides disciplinary expertise as a subject librarian. As part of identifying student access

and affordability as a key strategic goal for the Library, Library liaisons are skilling up in Open Educational Resources and Open Access publishing in their disciplines. Library liaisons are well-situated to individually partner with course instructors to integrate Open textbooks or other Open Educational Resources into their classes.

Open/OER Resolution

On August 23rd, 2018 the faculty of the University of Idaho Library voted to adopt the following resolution:

OPEN ACCESS RESOLUTION

The University of Idaho Library faculty believes that open access to scholarship positively supports the communication of library research and scholarship and the future of libraries and education. We aim to reduce barriers to access to enable our local, state, and professional communities to engage with our scholarship. Recognizing that academic scholarship depends upon the ability to access and utilize research output, the Library Faculty at the University of Idaho hereby resolve to make our own research freely available when possible by seeking publishers that have either adopted open access policies, publish contents online without restriction, and/or allow authors to self-archive their publications on the web. We resolve to link to and/or self-archive our publications to make them freely accessible, negotiating with publishers when necessary to achieve this. We recognize that open access and peer-review are independent concepts and regard an adherence to high quality, peer-reviewed scholarship as essential for University of Idaho Library faculty, regardless of the nature of access. The University of Idaho Library Open Access Resolution is inspired by language from the Virginia Commonwealth University Library Open Access Resolution.

Appendix B

University of Idaho
Center for Disability Access and Resources

Canvas Course Design Accessibility Checklist

→ Use this checklist as a guide for accessibility while you are designing your course.

✓	Navigation and Organization
☐	Navigational links and labels are clear and consistent.
☐	Module content has a logical order and organization.
☐	Content created in the Rich Content Editor is structured with headings using the Paragraph dropdown toolbar. Canvas Headings
☐	Headings are descriptive and used in order.

✓	Text and Links
☐	Written content is created with the Rich Content Editor in Canvas (unless in an accessible file download).
☐	Link text is descriptive, consistent, and clearly distinguishable from other text.
☐	All links are tested and valid.
☐	Colors on text and background are high contrast.

✓	Text and Links
☐	Equations, formulas, and scientific notation were created using the Rich Content Editor and/or are available in another accessible format.
☐	Lists contain related, ordered content and are formatted with bullet points or numbers using the Rich Content Editor.

✓	Tables –
☐	Tables are inserted using the Rich Content Editor tool. Creating Accessible Tables in Canvas
☐	Tables clearly show relationships between items.
☐	Headings in tables appear in a single row.

✓	Images
☐	Color on images is high contrast when possible. WebAIM Contrast Checker
☐	Images, including pictures, graphs, diagrams, and charts, have alt-text that includes a complete image description. Harvard Guide to Writing Alt Text ❖ The "Decorative Text" checkbox can be checked for decorative images (the alt-text field can be left blank.)
☐	The alt-text for images with text contains the equivalent text.

✓	Video
☐	Videos have captions and transcripts.
☐	Captions and transcripts have been reviewed for accuracy.
☐	Visual-only content in videos has accompanying audio descriptions.

✓	Audio
☐	Audio files (podcasts, recordings, etc.) have transcripts.
☐	Transcripts have been reviewed for accuracy.

✓	Files
☐	PDFs are converted to OCR and all PDF text is selectable/machine readable. Creating Accessible Documents
☐	Microsoft Office documents (Word, PowerPoint, etc.) are created using the most recent version of the program.
☐	Excel documents contain no empty cells and are used strictly for organizing data (no images or long blocks of text.)

✓	Assessments
☐	Extend time on Quizzes using the “Moderate this Quiz” tool to accommodate students as needed. Extending Time in Canvas Quizzes
☐	Extend due dates on Assignments to accommodate students as needed.

✓	Other
☐	Assignments and activities using a 3rd party tool have been made accessible and/or I have an alternative plan if the content is not accessible.

✓	Quality Assurance
☐	I ran the Accessibility Checker for all Rich Content Editor content in my course.
☐	I ran the Canvas A11Y tool in my course.
☐	I ran the accessibility checker for document files (Word, PowerPoint, etc.) in the corresponding program.
☐	I made the suggested changes to my course.

Appendix C

Faculty Technology Tools Survey

Survey Instructions and Content

Title	Faculty Technology Tools Survey
Audience	All TAs, instructors and teaching faculty
Planned Frequency	Twice annually, April and October, beginning in April 2022
Purpose	The purpose of this survey is to identify technology tools in use by teaching TA's, instructors and faculty that are not centrally supported by the Office of Information Technology (OIT, formerly ITS and department IT professionals).
Scale	Some questions will be multiple choice and open data entry.
Key Data Elements	• [Per ITC] Survey will be person specific so we will automatically capture name, college and department information for analysis. • Names of tools • Costs of tools that are paid by departments or passed on to students • Survey should be specific to a person so that we can gather the above information and determine overall response rate
Survey Introduction	The University Teaching Committee (UTC) and the Office of Information Technology greatly appreciates you taking the 5-10 minutes necessary to complete this survey that will help identify technology tools used in support of teaching that are not centrally support by the university. Survey results will be used to identify gaps in current offerings and possibilities for central support of needed tools. If you have questions concerning this survey please email <<<name and contact info>>>.
Planned Outcomes	1. Compilation of all software in use at U of I that supports course delivery, by category, documented on a website for review by all instructors 2. Improved understanding of additional costs to students

3. Identification of categories or specific software/tools used in a critical mass for which an institutional license should be pursued
4. Identification of potential risks in information security or compliance
5. Identification of gaps in standard software

Survey

Page 0

[Text] The university offers many standard tools for course delivery and student interaction (Microsoft suite of products, Zoom, Canvas LMS, Camtasia and others). We are asking you to identify products (software applications, websites, mobile apps) you use that are not part of the standard tools where you or a student have to create a login, pay a fee or where student interactions with the course are tracked. Websites (like YouTube) that do not require a login or into which students do not enter information need not be listed.

Page 1

[Multiple Choice – Multiple Answer Question] Please select from the list below any category of technology resource in which you use a product to aid in delivering your course(s):

Select	Category
	Bibliography, Citation, and Reference Software
	Classroom/course response (Example: Poll Everywhere, replacements for in-class clickers)
	Collaboration tools (Examples: Slack, threaded discussions, video meetings)
	Data analysis or visualization (Example: SAS or Tableau)
	Discipline-specific software/tools
	Document storage (Example: Box, DropBox, Google Drive, etc.)
	Grading or gradebook software
	Learning Management System (other than Canvas)
	Lecture capture (Panapto, etc.)
	Online course content/resource repositories and online publisher materials (Pearson online books)
	Plagiarism prevention software
	Quizzing or testing
	Other

Page 2 and Beyond

[Display Logic – for each category selected on page 1, the following question will appear] In the category of <<category name>>, please list the software/tools used as part of course delivery that is not a standard university-provided tool. Please add as many lines as necessary.

Name [Required]	Type [Required] • Web software • Downloaded software • Mobile app	Is there a cost to the student? [Required] • Yes • No	Is there a cost to faculty/department [Required] • Yes • No
		[If yes - capture cost and cost frequency]]	[If yes – capture cost and cost frequency]
[Instructors can add as many lines as necessary]			

[Multiple Line Text Input Field – Suggestion from ITC] If you have any additional comments on this topic that you think would be valuable for the university to consider, please include them here.

Closing Page

[Text] Thank you for completing this important survey. If you have any questions, please contact <<<name and contact info>>>.

BUSINESS AFFAIRS AND HUMAN RESOURCES
DECEMBER 21, 2022

TAB	DESCRIPTION	ACTION
1	**AMENDMENT TO BOARD POLICY V.H. – ESTABLISHMENT OF FEES - SECOND READING**	Motion to Approve
2	**FY 2022 FINANCIAL RATIOS**	Information Item
3	**FY 2022 NET POSITION REPORTS**	Information Item

SUBJECT

Board Policy V.H., Audit, Risk and Compliance Committee and V.Y. Compliance Programs – Second Reading

REFERENCE

June 2005	Board approved first reading updating policy to bring it into alignment with creation of Audit Committee.
August 2005	Board approved second reading of policy.
December 2008	Removal of ISDB, Historical Society and Commission from all applicable policies.
December 2015	Board approved first reading of amended policy dealing with audits of agencies under Board jurisdiction.
April 2016	Board approved second reading of policy amendments.
October 2022	Board approved first reading of amended policy V.H. and repeal of Policy V.Y.

APPLICABLE STATUTE, RULE, OR POLICY

Idaho State Board of Education Policies V.H. and V.Y.

BACKGROUND/DISCUSSION

At its June 7, 2022 meeting, the Audit Committee provided final comments on amendments to Board Policy V.H. and the repeal of Board Policy V.Y. The changes move the provisions of Policy V.Y. to Policy V.H. and change the title of the Audit Committee to the Audit, Risk and Compliance Committee to better reflect the scope of the committee's work.

The amendments include:

- Incorporating key portions of the audit committee charter into board policy and board bylaws. The separate audit committee charter will be eliminated, and Board Policy V.H. and the bylaws will serve as the audit committee charter going forward.
- Providing changes to internal audit sections needed to meet professional internal audit standards and to reflect the new consolidated structure.
- Aligning audit-related sections of Board Policy V.H. and the bylaws.
- Adding general language addressing the consolidated risk management function.
- Moving Committee responsibilities into one policy section.
- Adding language to provide for co-sourcing audit arrangements.
- Updating language related to confidential reporting lines.
- Providing general updates to Board Policy V.H.

The Audit Committee section of the Board's bylaws was amended and presented to the Board as a first reading at the August 24, 2022 meeting and as a second reading at the October 18, 2022 meeting through the Policy, Planning, and Governmental Affairs portion of the agenda.

IMPACT

Approval of the proposed amendments would provide foundational guidelines for the newly created Internal Audit and Systemwide Risk Management roles at the Office of the State Board of Education (OSBE) and clarify processes and procedures related to the Board's audit, risk and compliance functions.

ATTACHMENTS

Attachment 1 – Redline of Board Policy V.H., Audits – Second Reading
Attachment 2 – Redline of Board Policy V.Y., Compliance Programs – Second Reading - Repeal

BOARD STAFF COMMENTS AND RECOMMENDATIONS

These changes have been vetted through the Audit Committee. A Chief Audit Executive is currently on staff at OSBE, and he works with audit employees at the four-year institutions. The institution audit staff continue to work on their campuses under the management of the Chief Audit Executive, and they will become OSBE employees pending approval of the FY 2024 budget request.

Staff will continue to work with the Audit Committee and institution staff to clarify and refine OSBE's risk management plan and how it relates to the work of the committee. A Systemwide Risk Manager is projected to be on staff at OSBE by the beginning of next year.

There were no changes from the first reading. Staff recommends approval.

BOARD ACTION

I move to approve the second reading of Board Policy V.H. and to repeal Board Policy V.Y. as presented in Attachments 1 and 2.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

Idaho State Board of Education
GOVERNING POLICIES AND PROCEDURES
SECTION: V. Financial Affairs
SUBSECTION: H. Audit, Risk and Compliance Committees~~s~~ **December ~~2008~~2022**

1. General Purpose and Governance

The Audit, Risk and Compliance Committee (Committee) is established as a standing committee of the Board under Idaho State Board of Education, Policies and Procedures, Section I. Bylaws ~~appointed by the Board in fulfilling its~~ to provide fiscal, compliance and risk management oversight responsibilities. The Committee provides oversight ~~to the organizations under its governance (defined in Idaho State Board of Education, Policies and Procedures, Section I. A.1.)~~ for: financial statement integrity, financial practices, internal control systems, financial management, risk management, compliance and standards of conduct. This policy and relevant sections of the Board's bylaws serve as the audit charter for the Audit, Risk and Compliance Committee.

The Committee serves as the Board's liaison with its external auditors, regulatory auditors, the internal audit and risk management functions of the Office of the Board of Education, and with compliance officers of ~~and with the external and internal audit operations of~~ the agencies and institutions. The Committee reviews agency and institution fiscal operations. The Committee also reviews institutional procedures for controlling operating risks and oversees compliance activities. –The Committee chairperson reports periodically to the Board on the activities of the Committee, including any recommended changes or additions to the Board's policies and procedures through the Business Affairs and Human Resources Committee. The Committee is authorized to act on applicable items that do not require Board approval.

The Committee shall meet at least four times per year and may be ~~combined~~aligned with regularly scheduled Board meetings or more frequently as circumstances may require. The Committee may require institution or agency management or others to attend the meetings and provide pertinent information as necessary.

~~2.~~
~~3.~~2. Calendar

The Committee shall establish a calendar of all regularly scheduled meetings including ~~meetings~~ Committee chairperson (or designee) reports to~~with~~ the Board, the independent auditors, institutions, and others as appropriate. The Committee should take into consideration the requirements and due dates of other State agencies in establishing timelines.

~~1. Audit Committee~~

~~a. Membership~~

~~Each member of the Committee shall be in good standing, and shall be independent in order to serve on the Committee. The Committee minutes will indicate whenever a new member is appointed by the Board as well as an acknowledgement that independence has been verified for the new member. Affirmation of independence will be documented in the minutes annually or whenever a change in status by any Committee member occurs.~~

~~b. Financial Expert~~

~~At least one member of the Committee shall be designated as a financial expert and indicated in the Committee minutes. This designation shall be affirmed annually, unless there is a change in status.~~

~~c. Board Bylaws on Audit Committee~~

~~The Committee will review, reassess the adequacy of, and recommend any proposed changes to the Board annually, unless changes are needed during the course of the year, in light of new best practices and new legal requirements.~~

~~Meetings~~

~~The Committee shall meet at least four times per year and may be combined with regularly scheduled Board meetings or more frequently as circumstances may require. The Committee may require institution management or others to attend the meetings and provide pertinent information as necessary. All members are expected to attend each meeting in person, via telephone conference or videoconference. The agendas for meetings should be prepared and provided to members in advance, along with appropriate briefing materials. Minutes shall be prepared that document decisions made and action steps established and shall be maintained at the Board office.~~

~~4.~~3. Selection of External ~~Independent~~ Auditors

Items 3, 4 and 5 apply to the institutions only (Boise State University, Idaho State University, University of Idaho, and Lewis-Clark State College~~, and Eastern Idaho Technical College~~).

~~d.~~a. The Committee shall allow enough time to prepare and publish a ~~Request for Proposal~~request for proposal, review and evaluate proposals, obtain Board approval of the selected audit firm, and negotiate ~~and authorize~~ a contract.

~~e.~~b. The Committee may establish a process for selecting an ~~independent~~ external audit firm. The process used should include representatives from the Board, Committee, and institutions.

~~f.~~c. The Committee shall make the selection of the recommended external audit firm.

d. The selection of the new external audit firm shall be presented to the Board ~~and ratified~~ for approval at the next Board meeting following the Committee's ~~selection~~recommendation.

~~g.~~e. An annual review of external auditor performance and fees shall be conducted.

4. ~~Independent Auditors~~Financial Statement Auditors

a. Lead Partner Rotation

~~h. Lead Audit Partner Rotation~~

It is the intent of the Board to adhere to the recommendation of the National Association of College and University Business Officers (NACUBO) to require rotation of the lead audit partner of the ~~independent~~ external audit firm every five years, with a two-year timeout provision. The Committee shall establish when the five-year limit will be reached for the current lead audit partner. At least one year prior to that time, the Committee shall discuss transition plans for the new lead audit partner. The five-year limit will be reviewed annually with the ~~independent~~ external auditors. These discussions shall be documented in the Committee meeting minutes.

~~b.~~ Scope and Reporting ~~Risk Assessment~~

~~c. Prior to the publication of the independent auditor's report, the Committee will review all material written communications between the independent auditors and institution management, including management letters and any schedule of unadjusted differences. The Committee shall conclude on the appropriateness of the proposed resolution of issues, and the action plan for any items requiring follow-up and monitoring. The Committee shall review these risks with institution management at each meeting or sooner, if necessary, to make sure it is up-to-date.~~

~~d.~~b.

~~i. Audit Scope~~

i. Prior to External Audit: Prior to the start of any audit work for the current fiscal year, the Committee will meet with the lead external audit partner to review the audit scope. Questions related to audit scope may include significant changes from prior year, reliance on internal controls and any internal audit function, assistance from institutional staff, and changes in accounting principles or auditing standards. The Committee should also discuss how the audit scope will uncover any material defalcations or fraudulent financial reporting, questionable payments, or violations of laws or regulations. Areas of the audit deserving special attention by the Committee and issues of audit staffing should be reviewed.

ii. Prior to the publication of the external auditor's report, the Committee will review all material written communications between the external auditors and institution management, including management letters and any schedule of unadjusted differences. The Committee shall conclude on the appropriateness of the proposed resolution of issues, and the action plan for any items requiring follow-up and monitoring. The Committee shall review these risks with institution management at each meeting or sooner, if necessary, to make sure it is up-to-date.

~~ii~~iii. Subsequent to Audit: Subsequent to the external audit report, the Committee shall meet with the lead external audit partner and the Chief Financial Officer of each institution, to review the scope of the previous year's audit, and the inter-relationship between any internal audit function and the external auditors with respect to the scope of the ~~independent~~ external auditor's work. Prior to the start of interim work for the current year audit, the Committee shall review the plans for the audit of the current year.

~~e.~~c. Accounting Policies

Annually and/or in conjunction with the year-end external audit, the Committee shall review with the lead external audit partner all critical accounting policies and practices and all alternative treatments of financial information within generally accepted accounting principles that have been discussed with management of the institutions, the ramifications of each alternative, and the treatment preferred by each institution.

~~f.~~d. Financial Statement Review

At the completion of the ~~independent~~ external audit, the Committee shall review with institution management and the ~~independent~~ external auditors each institution's financial statements, Management's Discussion and Analysis (MDA), related footnotes, and the ~~independent~~ external auditor's report. The Committee shall also review any significant changes required in the ~~independent~~ external auditor's audit plan and any serious difficulties or disputes with institution management encountered during the audit. The Committee shall document any discussions, resolution of disagreements, or action plans for any item requiring follow-up.

~~g.~~e. Single Audit Review

At the completion of the Single Audit Report (as required under the Single Audit Act of 1984, and the Single Audit Act Amendments of 1996), the Committee shall review with institution management and the ~~independent~~ external auditors each institution's Single Audit Report. The Committee shall discuss whether the institution is in compliance with laws and regulations as outlined in the current

Single Audit Act described in the U.S. Office of Management and Budget (OMB) Circular A-133 Compliance Supplement. The Committee shall report to the Board that the review has taken place and any matters that need to be brought to the Board's attention. The Committee shall document any discussions, resolution of disagreements, or action plans for any item requiring follow-up.

5. Internal Audit (Internal Audit and Advisory Services – IAAS)~~s~~

a. ~~The Committee shall~~ IAAS reports functionally to the Committee and administratively to the Board's Executive Director. The Committee shall have sole oversight of internal audit related activities. The internal audit function will be administered by a Chief Audit Executive (CAE) within the Office of the State Board of Education. Institutions are prohibited from establishing their own internal audit functions. The Committee shall:

i. Ensure that IAAS works under an internal audit charter, reviewed annually by the Committee
ii. Ensure the functional independence of IAAS
iii. Consult with the executive director on the appointment of a CAE to oversee administration of IAAS
iv. Consult with the executive director on termination or discipline of the CAE
v. Provide input into the performance review of the CAE
vi. Approve and provide feedback on an annual audit plan submitted by the CAE
vii. Advise the Board about increases and decreases to internal audit resources needed to carry out internal audit activities
viii. Receive and review an annual performance report on internal audit activities from the CAE.
ix. Review internal audit's conformance to the *International Standards for the Professional Practice of Internal Auditing ("Standards")* published by the Institute of Internal Auditors ("IIA").
~~i.~~x. Review internal audit findings and recommendations, and review the adequacy of corrective action taken by institution management.

b. IAAS shall have free and unrestricted access to institutional personnel, buildings, systems and records needed to perform internal audit work. The Committee shall review and resolve any difficulties encountered by internal audit staff during the course of internal audit work, including restrictions on scope or access to personnel, buildings, systems or records.

c. IAAS will maintain a quality assurance and improvement program that covers all aspects of IAAS operations. The program will include an evaluation of IAAS's conformance with the *Standards* and an evaluation of whether internal auditors apply the IIA's Code of Ethics. The program will also assess the efficiency and effectiveness of IAAS and identify opportunities for improvement.

The CAE will communicate to the Committee IAAS's quality assurance and improvement program, including results of internal assessments (both ongoing and periodic) and external assessments conducted at least once every five years by a qualified, independent assessor or assessment from outside Idaho higher education.

~~6. review with institution management any significant findings on internal audits from the preceding 12 months and planned for the upcoming six months along with the status of each planned audit and management's responses thereto. The Committee shall review any difficulties the institution's internal audit staff encountered in the course of their audits, including any restrictions on the scope of their work or access to required information. The Committee shall discuss any internal audit function's budget and staffing.~~

~~7.~~

~~8.~~6. Other Audits

a. Legislative Audits

i. All state agencies under the Board's jurisdiction, excluding the State Department of Education, will receive financial statement audits and federal single audits in accordance with federal and state laws and regulations. The Committee must be informed immediately by an agency of any audit activity being conducted by the legislative auditor.

ii. At the completion of the legislative audit, the Committee shall discuss with the legislative auditor the progress of the legislative audit, including a full report on preliminary and final audit findings and recommendations.

b. Employee Severance Audits

When key administrative personnel leave an agency or institution, the Committee may bring to the full Board a recommendation as to whether an audit should be conducted and the scope of the audit.

c. Other External Audits and Reviews

The Committee is authorized to engage the services of outside auditors or evaluators to perform work used to supplement the work of the Committee, to assess compliance with laws and regulations, or to assess business processes.

~~9.~~7. Confidential ~~Complaints~~Reporting Lines

a. The Committee shall ensure the institutions have reporting mechanisms in place to provide for anonymous and confidential reporting of compliance issues. Such mechanisms include, but are not limited to, the use of external reporting hotlines.

The Committee shall review the effectiveness of institutional processes used to resolve reports received through reporting mechanisms.

b. Reports of accounting, internal control or auditing matters

i. The Committee shall set up a process to investigate complaints or reports received by the Board or institutions regarding accounting, internal accounting controls, ~~or~~ auditing, or other ~~matters that may be submitted by any party internal or external to any entity under its governance~~ areas of concern.

ii. The Committee shall review the procedures for the receipt, retention, timely investigation and proper treatment of complaints, referenced in the preceding paragraph ~~7.a, received by the Board~~. ~~The Committee shall review an original of each complaint received, no matter the media used to submit and discuss the status or resolution of each complaint. The Committee shall ensure that proper steps are taken to investigate complaints and resolve timely.~~ The Committee shall review a cumulative list of complaints submitted annually ~~to date to~~ to review for patterns or other observations.

8. Risk Management

The Committee shall provide oversight of a system-wide risk assessment/risk management program. To accomplish this, the Committee shall:

a. Consult with the executive director on the appointment of a system-wide Risk Manager;
b. Monitor and periodically review processes established by the system-wide Risk Manager and institutions to implement effective risk management activities;
c. Periodically receive reports/presentations from the system-wide Risk Manager; ~~.~~
d. If necessary, receive reports from institution employees who oversee departments that manage key risk areas.

9. Compliance

a. General

The Board is committed to ethical conduct and to fostering a culture of compliance with the laws and regulations which apply to the institutions and agencies under its governance.

b. Compliance Program

Each institution shall designate a chief compliance officer, approved by the Committee, and shall ensure that the institution establishes a compliance program to be approved by the Committee which must address, at a minimum, the following:

i. A code of ethics which applies to all employees.

~~i.~~ A published and widely disseminated list or index of all major compliance areas and responsibilities, categorized and prioritized based on ~~the~~ risk~~s~~, probability, and negative impact of potential events.

~~ii.~~ A mechanism for coordinating compliance oversight, monitoring and reporting. This includes a management level group or individual with authority to examine compliance issues and assist the chief compliance officer in investigating, monitoring, and assessing compliance and/or recommending policies or practices designed to enhance compliance.

~~iii.~~ A means of assuring institutional policies are regularly reviewed for compliance with current federal and state laws and regulations and Board policies.

ii. Provision of training to educate employees on the laws, regulations and institution policies that apply to their day-to-day job responsibilities.

c. Reporting

i. The chief compliance officer of each institution will prepare and submit a semi-annual compliance report in January and July, on a confidential basis, to Board counsel and the Committee noting all material compliance matters occurring since the date of the last report, and identifying any revisions to the institution's compliance program.

For purposes of this policy, a compliance matter shall be considered material if any of the following apply:

1) The perception of risk creates controversy between management and the internal auditor.
2) It could have a material impact on the institution's financial statements.
3) It is or could be a matter of significant public interest or that carries risk of significant reputational damage.
4) It may be reported in an external release of financial information.
5) It relates to key controls over financial information that are being designed or redesigned, have failed, or otherwise are being addressed by the organization.
6) It involves fraud related to management.
7) It leads to correction or enforcement action by a regulatory agency.
8) It involves potential financial liability in excess of $25,000

~~i.~~ Notwithstanding the foregoing, a compliance matter with financial liability in excess of two hundred thousand dollars ($200,000) must be reported to the Committee as soon as reasonably practicable. A de minimis compliance matter

need not be reported to the Committee at any time. A violation will be considered de minimis if it involves potential financial liability of less than twenty-five thousand dollars ($25,000) and is a matter that has not been recurring or is not otherwise indicative of a pattern of noncompliance. For purposes of this subparagraph, "potential financial liability" means the estimated obligation by the institution to another party resulting from noncompliance.

Compliance concerns at agencies under the governance of the Board shall be reported to the Committee by the Board's Executive Director when, in his/her discretion, the matter presents material ethical, legal, or fiduciary responsibilities or obligations.

Idaho State Board of Education
GOVERNING POLICIES AND PROCEDURES
SECTION: V. FINANCIAL AFFAIRS
SUBSECTION: Y. Compliance Programs October 2013

~~1. General~~

~~The Board is committed to ethical conduct and to fostering a culture of compliance with the laws and regulations which apply to the institutions and agencies under its governance.~~

~~2. Compliance Program~~

~~Each institution shall designate a chief compliance officer, approved by the Audit Committee (Committee), and shall ensure that the institution establishes a compliance audit program to be approved by the Committee which must address, at a minimum, the following:~~

~~a. A code of ethics which applies to all employees.~~

~~b. A published and widely disseminated list or index of all major compliance areas and responsibilities, and to categorize and prioritize these compliance areas and responsibilities by considering the risks, probability, and negative impact of potential events.~~

~~c. A mechanism for coordinating compliance oversight, monitoring and reporting. This includes a management level group or individual with authority to examine compliance issues and assist the chief compliance officer in investigating, monitoring, and assessing compliance and/or recommending policies or practices designed to enhance compliance.~~

~~d. A means of assuring institutional policies are regularly reviewed for compliance with current federal and state laws and regulations and Board policies.~~

~~e. Provision of adequate training to educate employees on the laws, regulations and institution policies that apply to their day-to-day job responsibilities.~~

~~3. Reporting~~

~~a. The chief compliance officer of each institution will prepare and submit a semi-annual compliance report in January and July, on a confidential basis, to Board counsel and the Committee noting all material compliance matters occurring since the date of the last report, and identifying any revisions to the institution's compliance program.~~

~~For purposes of this policy, a compliance matter shall be considered material if any of the following apply:~~

- ~~The perception of risk creates controversy between management and the internal auditor.~~
- ~~It could have a material impact on the financial statements.~~
- ~~It is or could be a matter of significant public interest or exposure.~~
- ~~It may be reported in an external release of financial information.~~
- ~~It relates to key controls over financial information that are being designed or redesigned, have failed, or otherwise are being addressed by the organization.~~
- ~~It involves fraud related to management.~~
- ~~It leads to correction or enforcement action by a regulatory agency.~~
- ~~It involves potential financial liability in excess of $25,000~~

b. ~~Notwithstanding the foregoing, a compliance matter with financial liability in excess of two hundred thousand dollars ($200,000) must be reported to the Committee as soon as reasonably practicable. A de minimus compliance matter need not be reported to the Committee at any time. A violation will be considered de minimus if it involves potential financial liability of less than twenty-five thousand dollars ($25,000) and is a matter that has not been recurring or is not otherwise indicative of a pattern of noncompliance. "Potential financial liability" means the estimated obligation by the institution to another party resulting from noncompliance.~~

c. ~~Compliance concerns at agencies under the governance of the Board shall be reported to the Committee by the Board's Executive Director when, in his/her discretion, the matter presents extraordinary ethical, legal, or fiduciary responsibilities or obligations.~~

SUBJECT

FY 2022 College and Universities' Financial Ratios

REFERENCE

December 2011-2022 Annual Audit reports submitted to the Board

APPLICABLE STATUTE, RULE, OR POLICY

Idaho State Board of Education Governing Policies & Procedures, Section V.F.

BACKGROUND/DISCUSSION

The ratios presented measure the financial health of each institution and include a "Composite Financial Index" based on four key ratios. The ratios are designed as management tools to measure financial activity and key trends within an institution over time. They typically do not lend themselves to comparative analysis between institutions because of the varying missions and structures of the institutions and current strategic initiatives underway at a given institution at a given time.

Institution foundations are reported as component units in the college and universities' financial statements. The nationally developed ratio benchmarks model is built around this combined picture.[1] An institution's foundation holds assets for the purpose of supporting the institution. Foundation assets are nearly all restricted for institution purposes and are an important part of an institution's financial strategy and financial health.

Ratio	Measure	Benchmark
Primary reserve	Sufficiency of resources and their flexibility; good measure for net assets	.40
Viability	Capacity to repay total debt through reserves	1.25
Return on net position	Whether the institution is better off financially this year than last	6.00%
Net operating revenues	Whether the institution is living within available resources	2.00%
Composite Financial Index	Combines four ratios using weighting	3.0
Debt Burden	Institution's dependence on borrowed funds	<= 8%
Debt Coverage	Ability of excess income over adjusted expenses to cover annual debt service payments.	2.0
Life of Capital Assets	Recent vs deferred investments	10 - 14

[1] See *Strategic Financial Analysis for Higher Education: Identifying, Measuring & Reporting Financial Risks* (7th ed.). New York, NY: Prager, Sealy & Co., LLC; KPMG, LLP; Attain, LLC. The model's analysis developed by industry experts is generally accepted in the field of higher education and has been around and evolving since 1980.

Three other ratios provided are the Debt Burden, Debt Coverage, and Life of Capital Assets. The Debt Burden ratio is calculated as debt service divided by adjusted expenditure. The benchmark for this ratio is set by the institution for no more than 8% per Board policy V.F. The Debt Coverage ratio is calculated as adjusted revenues divided by debt service. The benchmark for this ratio is set at 2. The Life of Capital Assets ratio is calculated as accumulated depreciation divided by depreciation expense. The benchmark for this ratio is 10 for research institutions and 14 for undergraduate liberal arts institutions.

IMPACT

These financial ratios and analyses are provided for the Board to review the financial health and year-to-year trends at the institutions. The ratios reflect a financial snapshot as of fiscal year end. The Audit Committee reviews key financial performance factors on a quarterly basis.

ATTACHMENTS

Attachment 1 - Boise State University – CFI Ratios
Attachment 2 - Boise State University - Debt Ratios
Attachment 3 - Idaho State University – CFI Ratios
Attachment 4 - Idaho State University – Debt Ratios
Attachment 5 - University of Idaho – CFI Ratios
Attachment 6 - University of Idaho – Debt Ratios
Attachment 7 - Lewis-Clark State College – CFI Ratios
Attachment 8 - Lewis-Clark State College – Debt Ratios

STAFF COMMENTS AND RECOMMENDATIONS

The ratios report for the University of Idaho have been adjusted this year to isolate University activity by removing the effect of the University of Idaho Strategic Initiatives Fund (SIF).

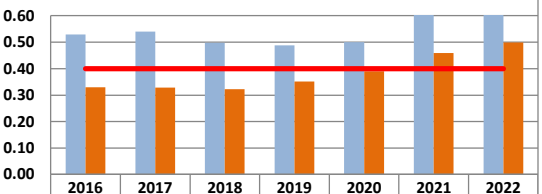
The SIF is treated under governmental accounting standards as a blended component unit of the University. This is different from the University of Idaho Foundation, which is considered a discretely presented component unit. Therefore, the SIF is blended into the financial statements of the University while the Foundation is presented in a separate column on the financial statements. The purpose of the SIF is to hold, invest, and disburse the proceeds received in advance from the University's utility concession agreement. These funds are invested over a long-time horizon (50 year agreement) and, thus, are subject to volatility in market value. This volatility has the potential to materially impact the operating results that are reported in the audited financial statements. For that reason, the University has modified the financial ratios to include results with and without the impact of the SIF**.**

Institution representatives are prepared to provide additional information about their financial ratios as needed.

BOARD ACTION

This item is for informational purposes only.

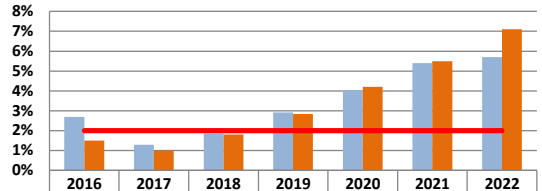
Boise State University
Primary Reserve



	2016	2017	2018	2019	2020	2021	2022
Consolidated	0.53	0.54	0.50	0.49	0.50	0.67	0.63
BSU Only	0.33	0.33	0.32	0.35	0.39	0.46	0.50
Benchmark	0.4	0.4	0.4	0.4	0.4	0.4	0.4

.40 indicates 5 months of operations can be covered by expendable reserves. Trend indicates whether institution has increased net worth in proportion to rate of growth in its operating size.

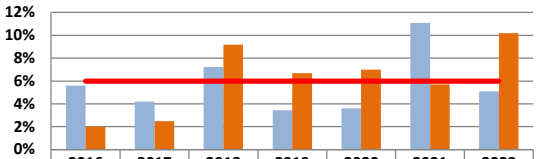
Boise State University
Net Operating Revenues



	2016	2017	2018	2019	2020	2021	2022
Consolidated	2.70%	1.30%	1.86%	2.92%	4.05%	5.40%	5.70%
BSU Only	1.50%	1.00%	1.80%	2.84%	4.21%	5.50%	7.10%
Benchmark	2%	2%	2%	2%	2%	2%	2%

Indicates whether institution is adding or subtracting from net assets. A pattern of deficits is a warning signal that management should focus on restructuring income and expense streams to return to an acceptable level.

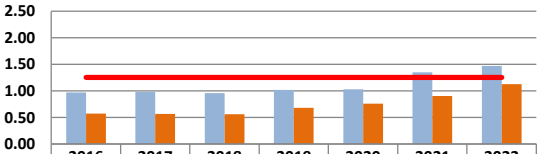
Boise State University
Return on Net Position



	2016	2017	2018	2019	2020	2021	2022
Consolidated	5.60%	4.20%	7.23%	3.43%	3.61%	11.10%	5.10%
BSU Only	2.00%	2.50%	9.20%	6.70%	7.00%	5.70%	10.20%
Benchmark	6%	6%	6%	6%	6%	6%	6%

Measures total economic return: higher is better. Lower is okay if it reflects the strategy and mission in setting up for future returns.

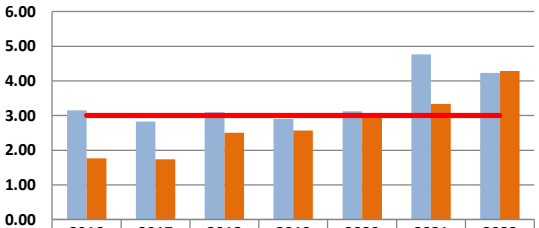
Boise State University
Viability



	2016	2017	2018	2019	2020	2021	2022
Consolidated	0.97	0.98	0.96	1.02	1.03	1.35	1.47
BSU Only	0.58	0.57	0.56	0.68	0.76	0.91	1.12
Benchmark	1.25	1.25	1.25	1.25	1.25	1.25	1.25

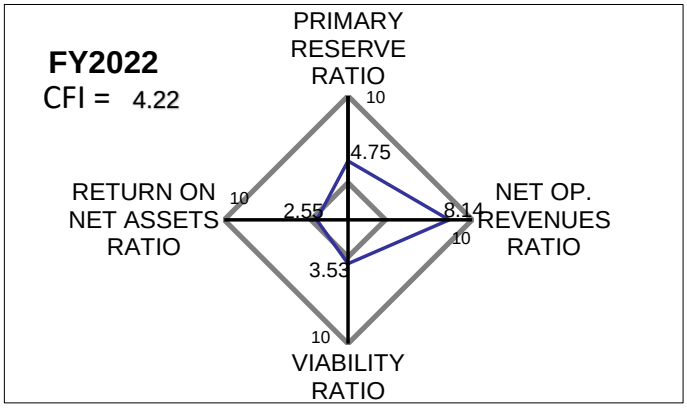
Measures ability to meet entire debt obligation with expendable net assets as of a balance sheet date.

BSU Consolidated Financial Index

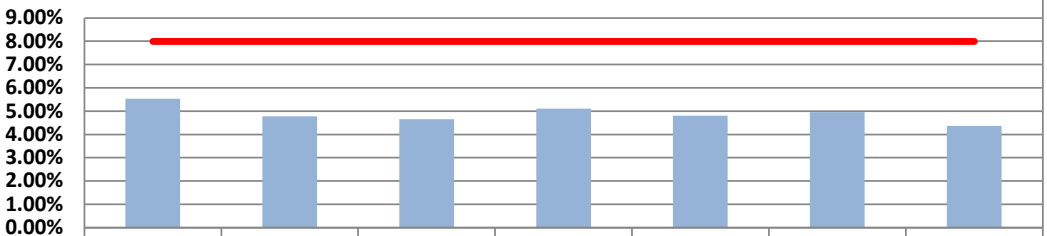


	2016	2017	2018	2019	2020	2021	2022
Consolidated	3.15	2.83	3.10	2.90	3.12	4.77	4.23
BSU Only	1.77	1.74	2.50	2.57	2.98	3.34	4.29
Benchmark	3.0	3.0	3.0	3.0	3.0	3.0	3.0

Indicates overall financial health.
Ratio range of 3-5 is ideal time to direct resources toward transformation.



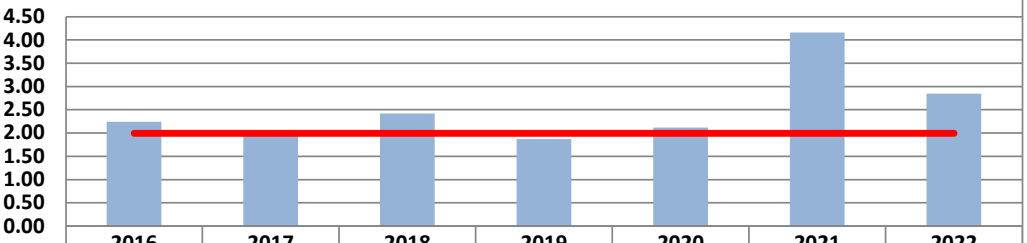
Boise State University
Debt Burden Ratio



	2016	2017	2018	2019	2020	2021	2022
Debt Burden	5.53%	4.78%	4.65%	5.10%	4.80%	4.96%	4.36%
Benchmark	8.00%	8.00%	8.00%	8.00%	8.00%	8.00%	8.00%

Reflects reliance on borrowed funds as a source of funds.

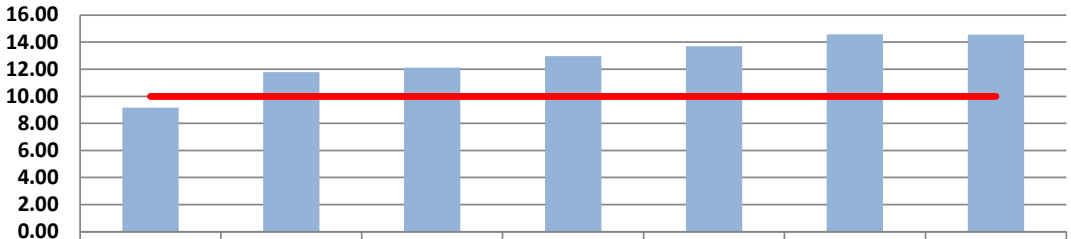
Boise State University
Debt Coverage Ratio



	2016	2017	2018	2019	2020	2021	2022
Debt Coverage	2.24	2.05	2.42	1.87	2.12	4.16	2.85
Benchmark	2.0	2.0	2.0	2.0	2.0	2.0	2.0

Reflects ability of excess income over adjusted expenses to cover annual debt service payments.

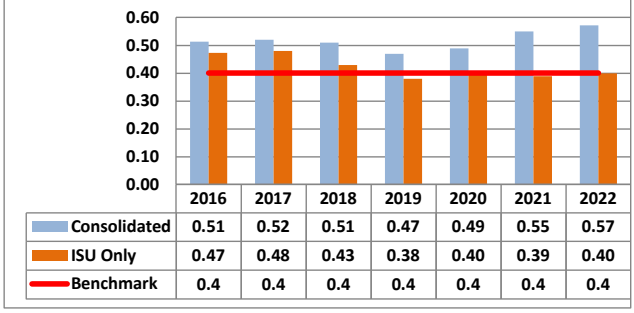
Boise State University
Life of Capital Assets



	2016	2017	2018	2019	2020	2021	2022
Life of Capital Assets	9.15	11.78	12.12	12.98	13.70	14.57	14.56
Benchmark	10.0	10.0	10.0	10.0	10.0	10.0	10.0

Higher ratio indicates more deferred reinvestment in plant facilities in the future.

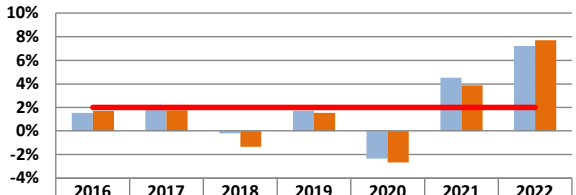
Idaho State University
Primary Reserve



	2016	2017	2018	2019	2020	2021	2022
Consolidated	0.51	0.52	0.51	0.47	0.49	0.55	0.57
ISU Only	0.47	0.48	0.43	0.38	0.40	0.39	0.40
Benchmark	0.4	0.4	0.4	0.4	0.4	0.4	0.4

.40 indicates 5 months of operations can be covered by expendable reserves. Trend indicates whether institution has increased net worth in proportion to rate of growth in its operating size.

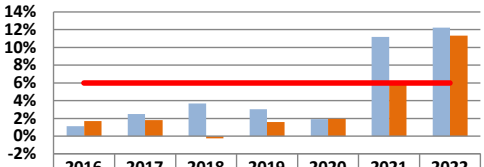
Idaho State University
Net Operating Revenues



	2016	2017	2018	2019	2020	2021	2022
Consolidated	1.55%	1.84%	-0.21%	1.73%	-2.35%	4.52%	7.22%
ISU Only	1.70%	1.76%	-1.33%	1.54%	-2.67%	3.87%	7.71%
Benchmark	2%	2%	2%	2%	2%	2%	2%

Indicates whether institution is adding or subtracting from net assets. A pattern of deficits is a warning signal that management should focus on restructuring income and expense streams to return to an acceptable level.

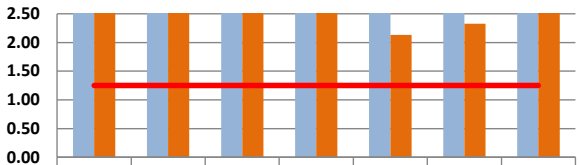
Idaho State University
Return on Net Position



	2016	2017	2018	2019	2020	2021	2022
Consolidated	1.11%	2.50%	3.67%	3.02%	1.92%	11.17%	12.24%
ISU Only	1.71%	1.82%	-0.24%	1.58%	1.94%	6.01%	11.33%
Benchmark	6%	6%	6%	6%	6%	6%	6%

Measures total economic return: higher is better. Lower is okay if it reflects the strategy and mission in setting up for future returns.

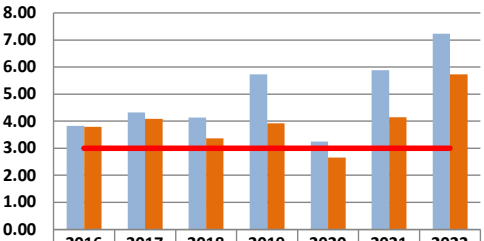
Idaho State University
Viability



	2016	2017	2018	2019	2020	2021	2022
Consolidated	2.56	2.91	3.26	3.56	2.52	3.18	4.20
ISU Only	2.54	2.87	2.93	3.04	2.13	2.33	3.03
Benchmark	1.25	1.25	1.25	1.25	1.25	1.25	1.25

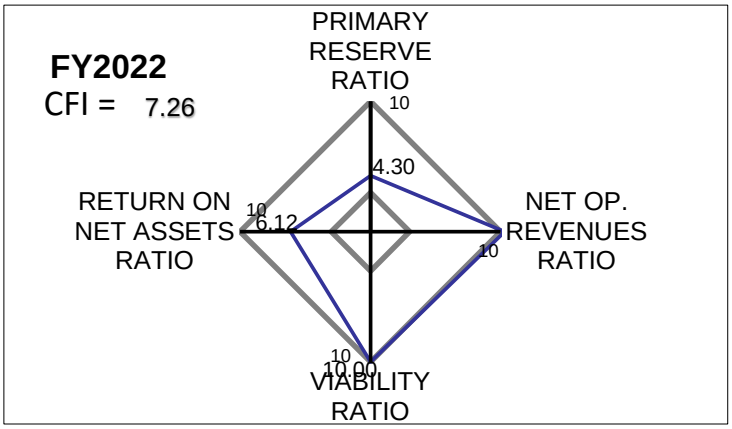
Measures ability to meet entire debt obligation with expendable net assets as of a balance sheet date.

ISU Consolidated Financial Index

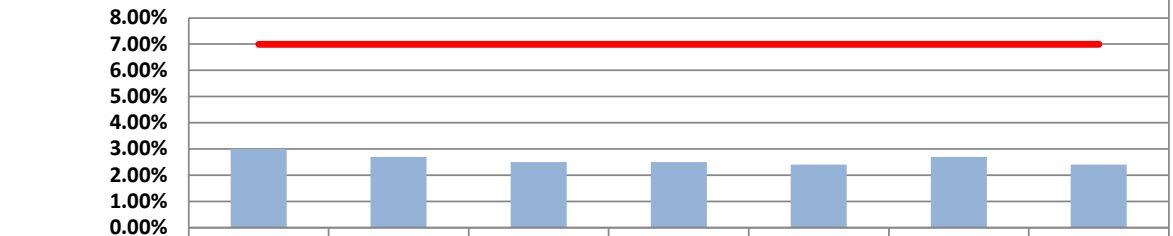


	2016	2017	2018	2019	2020	2021	2022
Consolidated	3.83	4.32	4.13	5.73	3.25	5.88	7.23
ISU Only	3.79	4.09	3.37	3.92	2.65	4.14	5.73
Benchmark	3.0	3.0	3.0	3.0	3.0	3.0	3.0

Indicates overall financial health.
Ratio range of 3-5 is ideal time to direct resources toward transformation.



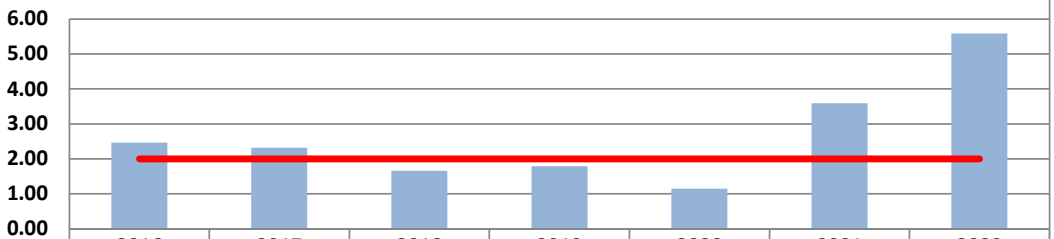
Idaho State University
Debt Burden Ratio



	2016	2017	2018	2019	2020	2021	2022
Debt Burden	3.00%	2.70%	2.50%	2.50%	2.40%	2.70%	2.40%
Benchmark	7.00%	7.00%	7.00%	7.00%	7.00%	7.00%	7.00%

Reflects reliance on borrowed funds as a source of funds.

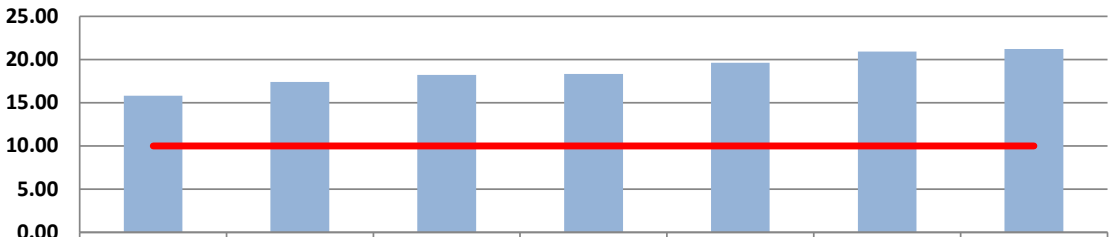
Idaho State University
Debt Coverage Ratio



	2016	2017	2018	2019	2020	2021	2022
Debt Coverage	2.47	2.32	1.66	1.79	1.15	3.59	5.59
Benchmark	2	2	2	2	2	2	2

Reflects ability of excess income over adjusted expenses to cover annual debt service payments.

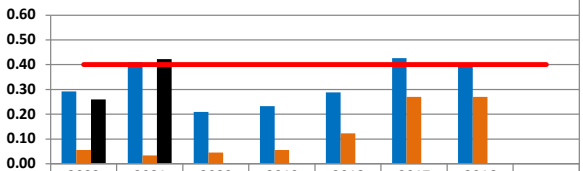
Idaho State University
Life of Capital Assets



	2016	2017	2018	2019	2020	2021	2022
Life of Capital Assets	15.80	17.40	18.20	18.30	19.60	20.90	21.20
Benchmark	10.0	10.0	10.0	10.0	10.0	10.0	10.0

Higher ratio indicates more deferred reinvestment in plant facilities in the future.

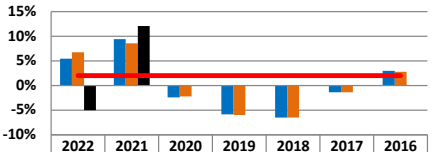
University of Idaho Primary Reserve



	2022	2021	2020	2019	2018	2017	2016	
Consolidated	0.29	0.41	0.21	0.23	0.29	0.43	0.40	
UI Only	0.06	0.03	0.05	0.06	0.12	0.27	0.27	
Consolidated Incl. SIF	0.26	0.42						
Benchmark	0.4	0.4	0.4	0.4	0.4	0.4	0.4	0.4

.40 indicates 5 months of operations can be covered by expendable reserves. Trend indicates whether institution has increased net worth in proportion to rate of growth in its operating size.

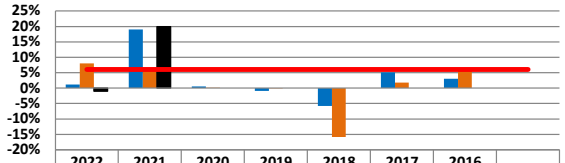
University of Idaho Net Operating Revenues



	2022	2021	2020	2019	2018	2017	2016
Consolidated	5.47%	9.40%	-2.40%	-5.90%	-6.50%	-1.40%	3.00%
UI Only	6.75%	8.60%	-2.20%	-6.00%	-6.50%	-1.40%	2.80%
Consolidated Incl. SIF	-5.03%	12.10%					
Benchmark	2%	2%	2%	2%	2%	2%	2%

Indicates whether institution is adding or subtracting from net assets. A pattern of deficits is a warning signal that management should focus on restructuring income and expense streams to return to an acceptable level.

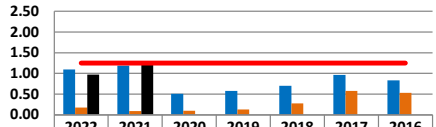
University of Idaho Return on Net Position



	2022	2021	2020	2019	2018	2017	2016	
Consolidated	1.20%	19.05%	0.50%	-0.90%	-5.80%	5.10%	3.00%	
UI Only	8.00%	6.32%	0.03%	-0.07%	-15.90%	1.80%	6.10%	
Consolidated Incl. SIF	-1.03%	19.93%						
Benchmark	6%	6%	6%	6%	6%	6%	6%	6%

Measures total economic return: higher is better. Lower is okay if it reflects the strategy and mission in setting up for future returns.

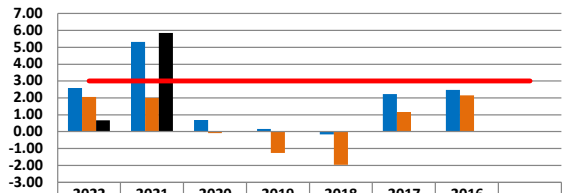
University of Idaho Viability



	2022	2021	2020	2019	2018	2017	2016
Consolidated	1.10	1.19	0.51	0.58	0.70	0.96	0.83
UI Only	0.18	0.09	0.10	0.13	0.28	0.58	0.53
Consolidated Incl. SIF	0.98	1.22					
Benchmark	1.25	1.25	1.25	1.25	1.25	1.25	1.25

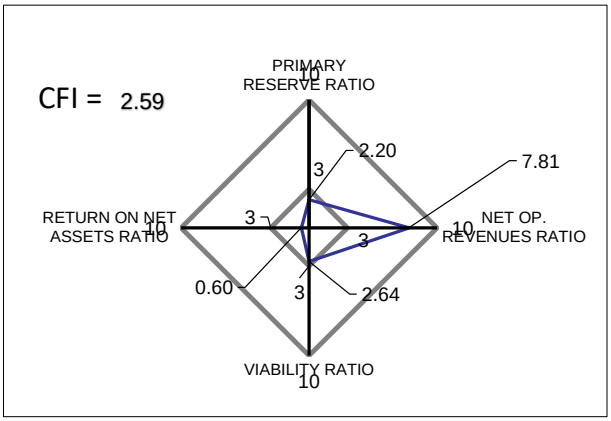
Measures ability to meet entire debt obligation with expendable net assets as of a balance sheet date.

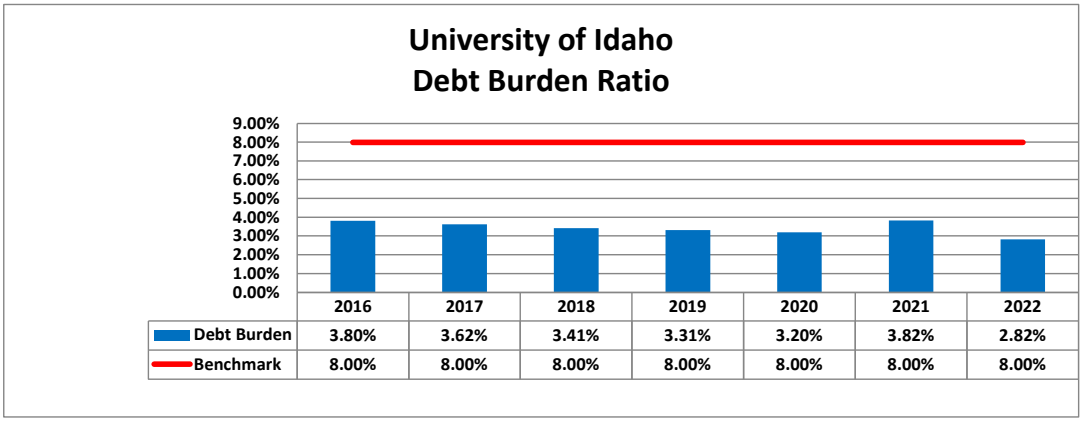
UI Consolidated Financial Index



	2022	2021	2020	2019	2018	2017	2016	
Consolidated	2.59	5.33	0.69	0.17	(0.16)	2.24	2.48	
UI Only	2.06	2.01	(0.08)	(1.26)	(1.96)	1.17	2.16	
Consolidated Incl. SIF	0.68	5.85						
Benchmark	3.0	3.0	3.0	3.0	3.0	3.0	3.0	3.0

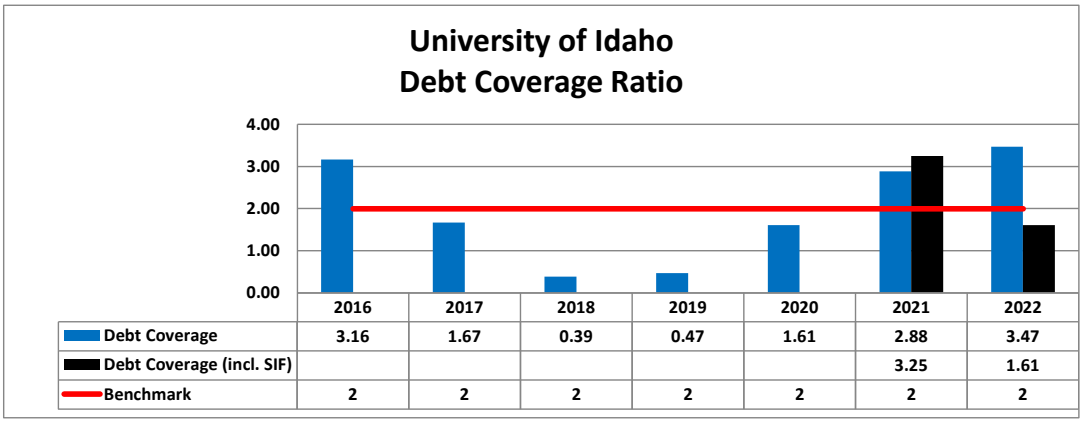
Indicates overall financial health.
Ratio range of 3-5 is ideal time to direct resources toward transformation.





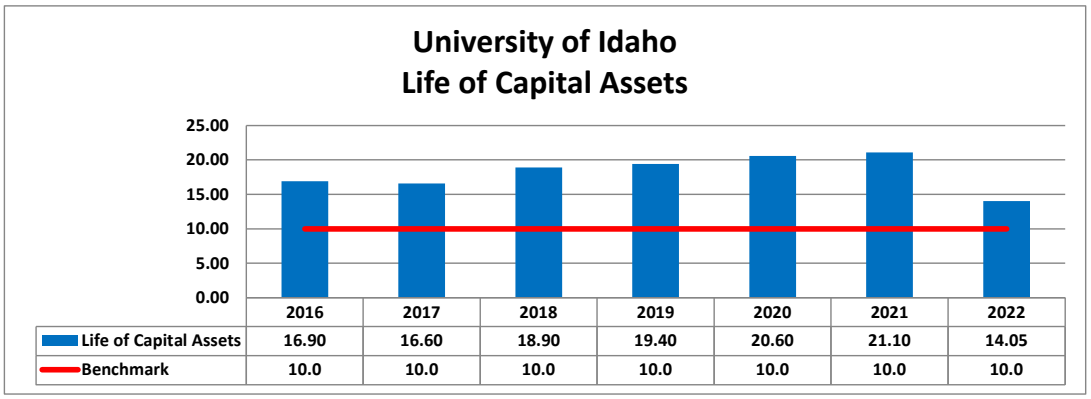
	2016	2017	2018	2019	2020	2021	2022
Debt Burden	3.80%	3.62%	3.41%	3.31%	3.20%	3.82%	2.82%
Benchmark	8.00%	8.00%	8.00%	8.00%	8.00%	8.00%	8.00%

Reflects reliance on borrowed funds as a source of funds.



	2016	2017	2018	2019	2020	2021	2022
Debt Coverage	3.16	1.67	0.39	0.47	1.61	2.88	3.47
Debt Coverage (incl. SIF)						3.25	1.61
Benchmark	2	2	2	2	2	2	2

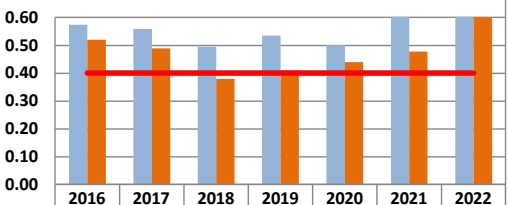
Reflects ability of excess income over adjusted expenses to cover annual debt service payments.



	2016	2017	2018	2019	2020	2021	2022
Life of Capital Assets	16.90	16.60	18.90	19.40	20.60	21.10	14.05
Benchmark	10.0	10.0	10.0	10.0	10.0	10.0	10.0

Higher ratio indicates more deferred reinvestment in plant facilities in the future.

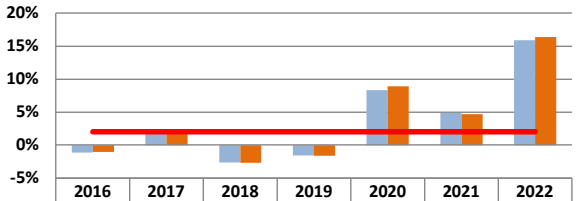
Lewis-Clark State College
Primary Reserve



	2016	2017	2018	2019	2020	2021	2022
Consolidated	0.57	0.56	0.50	0.54	0.50	0.64	0.77
LCSC Only	0.52	0.49	0.38	0.41	0.44	0.48	0.66
Benchmark	0.4	0.4	0.4	0.4	0.4	0.4	0.4

.40 indicates 5 months of operations can be covered by expendable reserves. Trend indicates whether institution has increased net worth in proportion to rate of growth in its operating size.

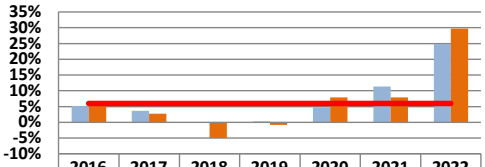
Lewis-Clark State College
Net Operating Revenues



	2016	2017	2018	2019	2020	2021	2022
Consolidated	-1.10%	2.00%	-2.62%	-1.54%	8.33%	4.91%	15.90%
LCSC Only	-1.00%	2.00%	-2.69%	-1.63%	8.93%	4.72%	16.40%
Benchmark	2%	2%	2%	2%	2%	2%	2%

Indicates whether institution is adding or subtracting from net assets. A pattern of deficits is a warning signal that management should focus on restructuring income and expense streams to return to an acceptable level.

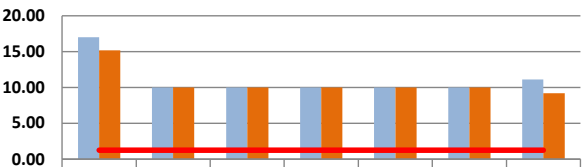
Lewis-Clark State College
Return on Net Position



	2016	2017	2018	2019	2020	2021	2022
Consolidated	5.19%	3.60%	-0.12%	0.26%	4.78%	11.32%	24.90%
LCSC Only	5.70%	2.70%	-4.93%	-0.85%	7.91%	7.91%	29.70%
Benchmark	6%	6%	6%	6%	6%	6%	6%

Measures total economic return: higher is better. Lower is okay if it reflects the strategy and mission in setting up for future returns.

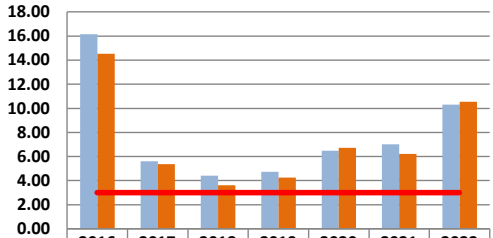
Lewis-Clark State College
Viability



	2016	2017	2018	2019	2020	2021	2022
Consolidated	17.00	10.00	10.00	10.00	10.00	10.00	11.14
LCSC Only	15.17	10.00	10.00	10.00	10.00	10.00	9.22
Benchmark	1.25	1.25	1.25	1.25	1.25	1.25	1.25

Measures ability to meet entire debt obligation with expendable net assets as of a balance sheet date.

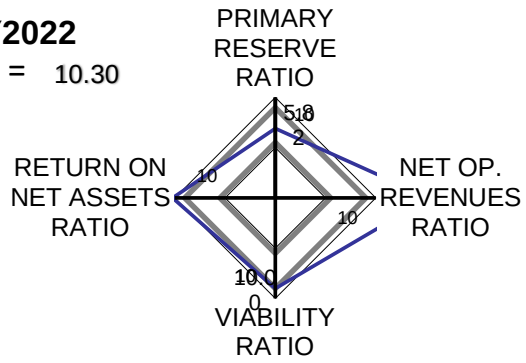
LCSC Consolidated Financial Index

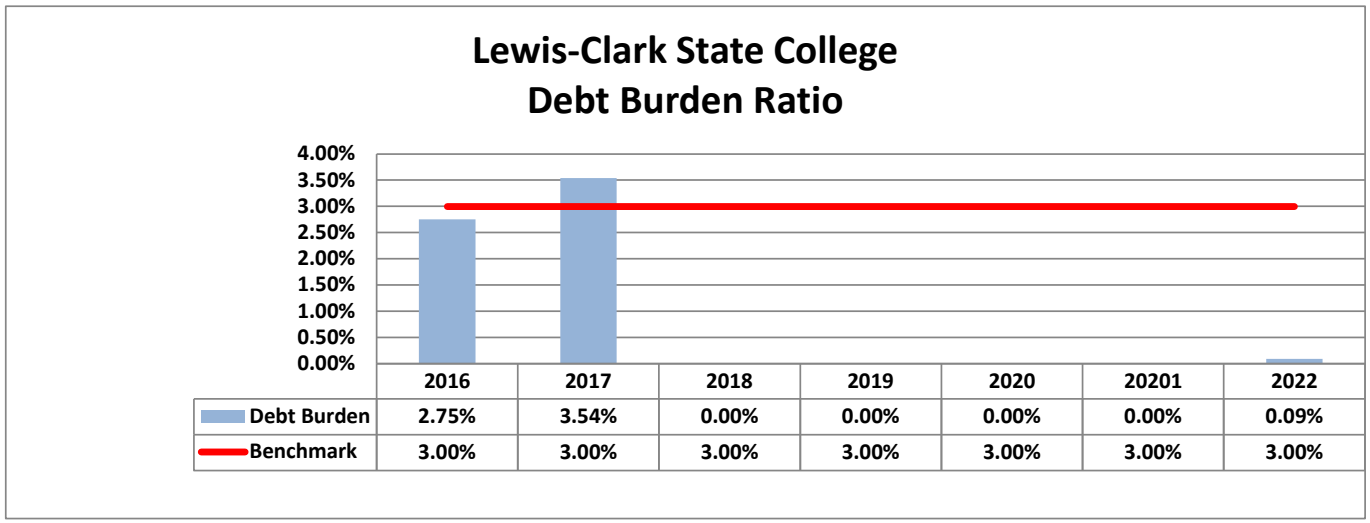


	2016	2017	2018	2019	2020	2021	2022
Consolidated	16.14	5.61	4.42	4.72	6.49	7.02	10.30
LCSC Only	14.53	5.36	3.61	4.25	6.72	6.22	10.55
Benchmark	3.0	3.0	3.0	3.0	3.0	3.0	3.0

Indicates overall financial health.
Ratio range of 3-5 is ideal time to direct resources toward transformation.

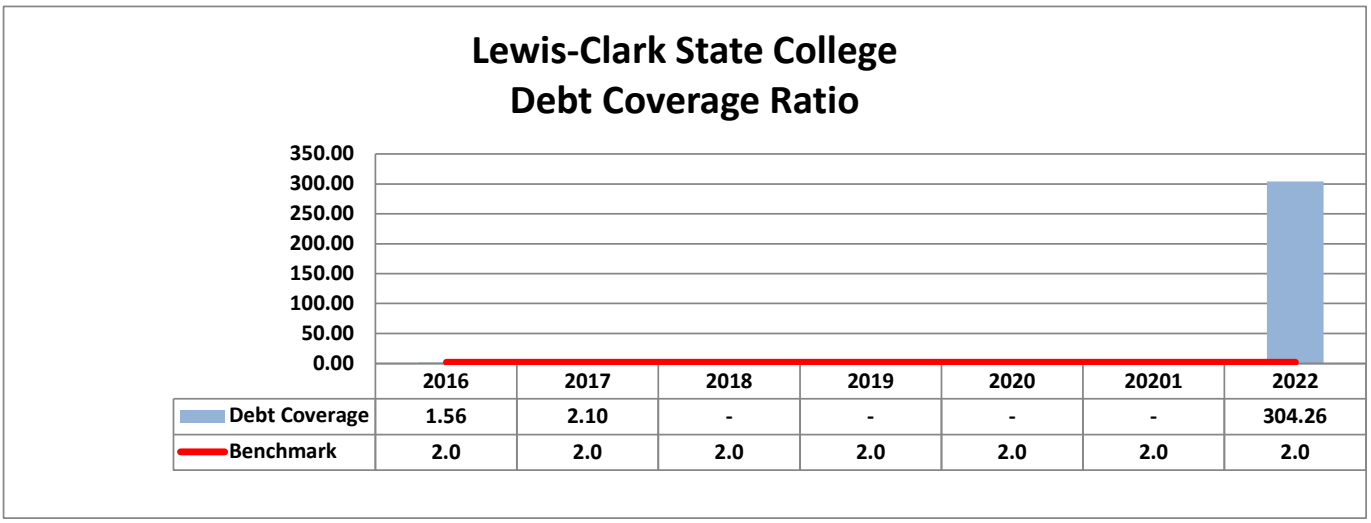
FY2022
CFI = 10.30





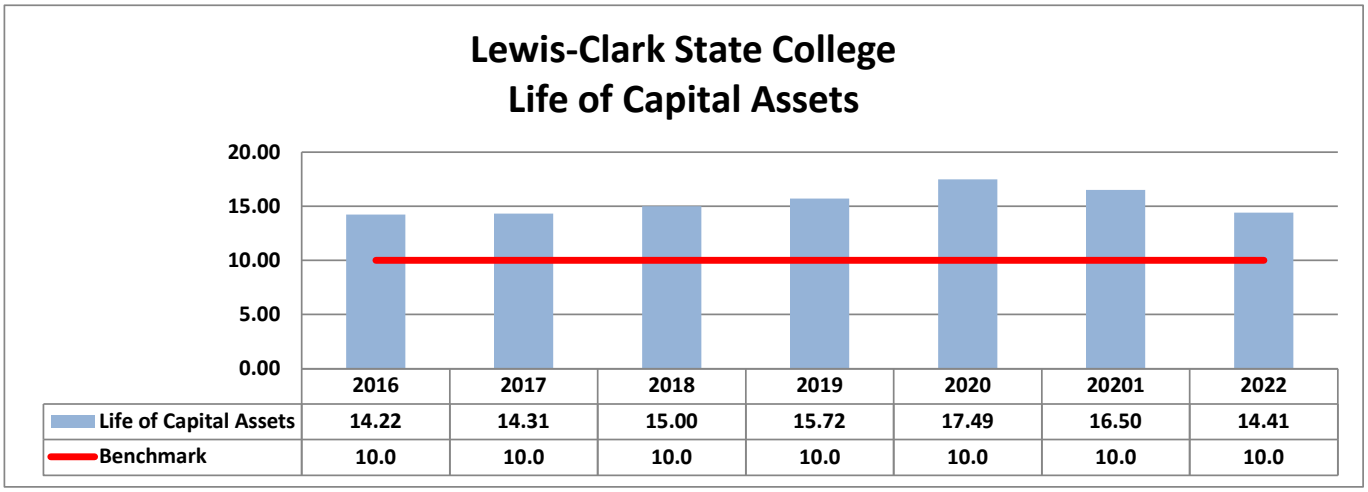
	2016	2017	2018	2019	2020	20201	2022
Debt Burden	2.75%	3.54%	0.00%	0.00%	0.00%	0.00%	0.09%
Benchmark	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%	3.00%

Reflects reliance on borrowed funds as a source of funds.



	2016	2017	2018	2019	2020	20201	2022
Debt Coverage	1.56	2.10	-	-	-	-	304.26
Benchmark	2.0	2.0	2.0	2.0	2.0	2.0	2.0

Reflects ability of excess income over adjusted expenses to cover annual debt service payments.



	2016	2017	2018	2019	2020	20201	2022
Life of Capital Assets	14.22	14.31	15.00	15.72	17.49	16.50	14.41
Benchmark	10.0	10.0	10.0	10.0	10.0	10.0	10.0

Higher ratio indicates more deferred reinvestment in plant facilities in the future.

SUBJECT

FY 2022 College and Universities' Unrestricted Net Position Balances

REFERENCE

December 2012 - 2022 Annual Audit reports submitted to the Board

APPLICABLE STATUTE, RULE, OR POLICY

Idaho State Board of Education Governing Policies & Procedures, Section V.B.

BACKGROUND/DISCUSSION

Net position balances provide a tool to gauge the amount and types of assets held by an institution. An analysis of unrestricted expendable assets provides insights into some of the "reserves" which might be available in order for an institution to meet emergency needs. The net position balances as of June 30, 2022 for Boise State University, Idaho State University, the University of Idaho, and Lewis-Clark State College are attached. The net position reports for the four institutions are broken out by the following categories:

Invested in capital assets, net of related debt: This represents an institution's total investment in capital assets, net of accumulated depreciation and outstanding debt obligations related to those capital assets. To the extent debt has been incurred but not yet expended for capital assets, such amounts are not included.

Restricted, expendable: This represents resources which an institution is legally or contractually obligated to spend in accordance with restrictions imposed by external third parties.

Restricted, nonexpendable: This represents endowment and similar type funds in which donors or other outside sources have stipulated, as a condition of the gift instrument, that the principal is to be maintained inviolate and in perpetuity and invested for the purpose of producing present and future income, which may either be expended or added to principal.

Unrestricted: This represents resources derived from student tuition and fees, and sales and services of educational departments and auxiliary enterprises. Auxiliary enterprises are defined as substantially self-supporting activities that provide services for students, faculty, and staff. Not all sources of revenue noted above are necessarily present in the unrestricted position.

Within the category of **Unrestricted Position**, the institutions reserve funds for the following:

Obligated: Contractual obligations represent a variety of agreements which support initiatives or operations that have moved beyond management planning into execution. Obligations include contracts for goods and services, including construction projects. Obligations contain debt service commitments for

outstanding debt and staffing commitments for personnel. These amounts also consist of inventories and other balances for which contractual commitments exist.

Designated: Designated net position represents balances not yet legally contracted, but which have been dedicated to initiatives that have been deemed to be strategic or mission critical. Balances include capital or maintenance projects that are in active planning phases. Facility and administrative cost recovery returns from sponsored projects (grants and contracts) are reinvested in infrastructure or on efforts to obtain additional grant funding. Documented central commitments to initiatives that have been approved at an executive level are designated.

Note: Designated reserves are not yet legally contracted, so technically they are still subject to management decision or reprioritization. However, it's critical to understand that these net position balances are a snapshot in time as of June 30, 2022, so reserves shown as "designated" on this report could become "obligated" at any point in the current fiscal year.

Unrestricted Funds Available: Balance represents reserves available to bridge uneven cash flows as well as future potential funding shortfalls such as:

- Budget reductions or holdbacks
- Enrollment fluctuations
- Unfunded enrollment workload adjustment (EWA)
- Unfunded occupancy costs
- Critical infrastructure failures

IMPACT

The volatility of state funding as well as fluctuations in enrollment and tuition revenue necessitates that institutions maintain fund balances sufficient to stabilize their operating budgets. As such, Board Policy V.B. sets a minimum target reserve of 5%, as measured by "Unrestricted Available" funds divided by annual operating expenses. The institutions' unrestricted funds available as a percent of operating expenses over the past five fiscal years are as follows:

	FY 2018	FY 2019	FY 2020	FY 2021	FY 2022
BSU:	3.8%	5.1%	.6%	1.9%	4.82%
ISU:	5.7%	5.2%	8.8%	7.3%	9.87%
UI:	(1.6%)	(7.9%)	(7.2%)	(3.9%)	(6.97%)
LCSC:	5.1%	1.6%	6.9%	7.4%	10.42%

ATTACHMENTS

Attachment 1 - BSU Net Position Balances
Attachment 2 - ISU Net Position Balances
Attachment 3 - UI Net Position Balances
Attachment 4 - LCSC Net Position Balances

STAFF COMMENTS AND RECOMMENDATIONS

Idaho State University and Lewis-Clark State College met the Board's 5% reserve target in FY22, while Boise State University was only 0.18% short of the reserve target.

University of Idaho has reported a negative $30.1 million for its "Unrestricted – Available" net position, which results in a negative ratio of 7.0% unrestricted available net position to FY22 operating expenses, a decline of $9.7 million over FY21, after removing the Strategic Initiatives Fund (SIF) from these figures. The decline was due in part to $7 million of unrealized losses from fair value adjustments to university investments. After adjusting for these unrealized losses and removing the impact of the SIF from the consolidated financial statements, the University reported positive results from operations of $35.7 million and available net position would have declined less than $3 million over FY21. FY22 unrestricted net position was also impacted by the reclassification of $11.8 million of net OPEB asset and net pension asset at June 30, 2022. This reclassification resulted in a reduction in unrestricted net position despite the positive operating results.

Representatives from the institutions are ready to provide a brief analysis of their financial net position balances and year-to-year trends.

BOARD ACTION

This item is for informational purposes only.

Idaho College and Universities - BOISE STATE UNIVERSITY

Net Position Balances

As of June 30, 2022

		6/30/2022
1	**Net Assets:**	
2	Invested in capital assets, net of related debt	*334,918,635*
3	Restricted, expendable	*27,029,514*
4	Restricted, nonexpendable	-
5	Unrestricted	*215,708,831*
6	**Total Net Position**	**577,656,980**
7		
8	**Unrestricted Net Position:**	**215,708,831**
9	Obligated (Note A)	
10	Debt Reserves	20,411,222
11	Capital Projects	
12	Facilities	23,262,599
13	Equipment	3,635,870
14	Program Commitments	
15	Academic	4,175,484
16	Research	419,432
17	Administrative Initiatives	12,022,792
18	Total Obligated	63,927,399
19	Designated (Note B)	
20	Capital Projects	
21	Facilities	60,006,630
22	FFE	10,142,035
23	Program Commitments	
24	Academic	17,486,518
25	Research	25,871,351
26	Other	1,616,879
27	Administrative Initiatives	7,380,410
28	Other	6,208,815
29		
30	Total Designated	128,712,638
31		
32	**Unrestricted Funds Available (Note C)**	**23,068,794**
33	FY22 Operating Expenses	478,125,254
34	Ratio of Unrestricted Funds Available to operating expenses (prelim)	4.82%
35	5% of operating expenses (minimum reserve target)	23,906,263
36	Two months of operating expenses	79,687,542.33
37	Ratio of Unrestriced Funds Available to two months of operating expenses	29%
38	Number of days expenses covered by Unrestricted Funds Available	17

Note A: **Obligated** - Contractual obligations represent a variety of agreements which support initiatives or operations that have moved beyond management planning into execution. Obligations include contracts for goods and services, including construction projects. Obligations contain debt service and staffing commitments for outstanding debt and personnel. These amounts also consist of inventories and other balances for which a contractual commitments exist.

Note B: **Designated** - Designated net assets represent balances that are not yet legally contracted, but have been dedicated to initiatives that have been deemed to be strategic or mission critical. Balances include capital or maintenance projects that are in active planning phases. Facility and administrative returns from sponsored projects (grants and contracts) are reinvested in infrastructure or on efforts to obtain additional grant funding. Documented central commitments to initiatives that have been approved at an executive level are designated.

Note C: **Unrestricted Funds Available** - Balance represents reserves available to bridge uneven cash flows as well as future potential reduced funding. Current examples of potential future reductions are:

Unfunded Enrollment Workload Adjustment (EWA)
Budget reductions or holdbacks
Enrollment fluctuations
Inflation

IDAHO STATE UNIVERSITY

Net Position Balances

As of June 30, 2022

	Net Position:	FY22
1	Invested in capital assets, net of related debt	$190,404,723
2	Restricted, expendable	$15,817,210
3	Restricted, nonexpendable	
4	Unrestricted	$97,368,177
5	Total Net Position	$303,590,110
	Unrestricted Net Position:	**97,368,177**
	Obligated (Note A)	
6	Debt Reserves	7,431,694
	Capital Projects	
7	Facilities	12,258,832
8	Equipment	3,918,964
	Program Commitments	
9	Academic	21,153,161
10	Total Obligated	44,762,651
	Designated (Note B)	
	Program Commitments	
11	Academic	17,039,748
12	Research	1,121,230
13	Other	2,767,084
14	Other	3,920,900
15	Total Designated	24,848,962
16	**Unrestricted Available (Note C)**	**27,756,564**
17	Operating expenses	281,248,029
18	Ratio of Unrestricted Funds Available to operating expenses	9.9%
19	5% of operating expenses (minimum available reserve target)	14,062,401
20	Two months operating expenses	46,874,672
21	Ratio of Unrestricted Funds Available to two months of operating expenses	59%
22	Number of days expenses covered by Unrestricted Funds Available	36

Note A: Obligated - Contractual obligations represent a variety of agreements which support initiatives or operations that have moved beyond management plannning into execution. Obligations include contracts for goods and services, including construction projects. Obligations contain debt service commitments for outstanding debt and staffing commitments for personnel. These amounts also consist of inventories and other balances for which contractual commitments exist.

Note B: Designated - Designated net assets represent balances that are not yet legally contracted, but have been dedicated to initiatives that have been deemed to be strategic or mission critical. Balances include capital or maintenance projects that are in active planning phases. Facility and adminstrative returns from sponsored projects (grants and contracts) are reinvested in infrastructure or on efforts to obtain additional grant funding. Documented central commitments to initiatives that have been approved at an executive level are designated.

Note C: Unrestricted Funds Available - Balance represents reserves available to bridge uneven cash flows as well as future potential reduced funding. Current examples of potential future reductions are: enrollment fluctuations, budget reductions or holdbacks.

University of Idaho

University of Idaho
Net Position Balances
As of June 30, 2022

Net position balances from audited financial statements have been adjusted below to remove the impact of the UI Strategic Initiatives Fund, a blended component unit, for comparability to prior years.

1	**Net Position:**		
2	Invested in capital assets, net of related debt		$ 299,433,674
3	Restricted, expendable		40,050,480
4	Unrestricted		(15,845,461)
5	Total Net Position		$ 323,638,693
6	**Unrestricted Net Position:**		$ (15,845,461)
7	Obligated (Note A)		
	- Debt Service Obligations	$ 11,129,835	
	- Capital Project and Equipment Fund Obligations	3,107,345	
	Total Obligated Funds		$ 14,237,180
9	**Unrestricted Available (Note C)**		$ (30,082,641)
10	Operating expenses		$431,788,125
11	Ratio of Unrestricted Funds Available to operating expenses		-7.0%
12	5% of operating expenses (minimum available reserve target)		$21,589,406
13	Two months operating expenses		$71,964,688
14	Ratio of Unrestricted Funds Available to two months of operating expenses		-42%
15	Number of days expenses covered by Unrestricted Funds Available		0

NOTES

Note A: Obligated - Contractual obligations represent a variety of agreements which support initiatives or operations that have moved beyond management planning into execution. Obligations include contracts for goods and services, including construction projects. Obligations contain debt service commitments for outstanding debt and staffing commitments for personnel. These amounts also consist of inventories and other balances for which contractual commitments exist.

Note B: Designated - Designated net assets represent balances that are not yet legally contracted, but have been dedicated to initiatives that have been deemed to be strategic or mission critical. Balances include capital or maintenance projects that are in active planning phases. Facility and adminstrative returns from sponsored projects (grants and contracts) are reinvested in infrastructure or on efforts to obtain additional grant funding. Documented central commitments to initiatives that have been approved at an executive level are designated.

Note C: Unrestricted Funds Available - Balance represents reserves available to bridge uneven cash flows as well as future potential reduced funding. Current examples of potential future reductions are:

Budget reductions or holdbacks
Enrollment fluctuations
Unfunded Enrollment Workload Adjustment (EWA)

Lewis-Clark State College
Net Position Balances
As of June 30, 2022

		LCSC
1	**Net Position:**	
2	Invested in capital assets, net of related debt	$72,435,653
3	Restricted, expendable	4,776,187
4	Restricted, nonexpendable	0
5	Unrestricted	32,095,204
6	**Total Net Position**	$109,307,044
7		
8	**Unrestricted Net Position:**	**$32,095,204**
9	Obligated (Note A)	
10	Debt Service	$244,924
11	Program Commitments	851,835
12	Capital Projects	118,693
13	Total Obligated	$1,215,453
14		
15	Designated (Note B)	
16	Capital Projects	
17	Facilities	$4,643,000
18	Equipment	1,232,946
19	Program Commitments	
20	Academic	2,653,201
21	Other	13,246,889
22	Other	3,307,348
23	Total Designated	$25,083,386
24		
25	**Unrestricted Available (Note C)**	**$5,796,367**
26		
27	Operating expenses	$55,640,323
28	Ratio of Unrestricted Funds Available to operating expenses	10.42%
29	Ratio of Designated and Unrestricted Funds Available to operating expenses	55.5%
30	Ratio of Obligated, Designated and Unrestricted Funds Available to operating expenses	57.7%
31	5% of operating expenses (minimum available reserve target)	$2,782,016
32		
33	Two months operating expenses	$9,273,387
34	Ratio of Unrestricted Funds Available to two months of operating expenses	63%
35	Number of days expenses covered by Unrestricted Funds Available	38

Note A: **Obligated** - Contractual obligations represent a variety of agreements which support initiatives or operations that have moved beyond management planning into execution. Obligations include contracts for goods and services, including construction projects. Obligations contain debt service commitments for outstanding debt and staffing commitments for personnel. These amounts also consist of inventories and other balances for which contractual commitments exist.

Note B: **Designated** - Designated net assets represent balances that are not yet legally contracted, but have been dedicated to initiatives that have been deemed to be strategic or mission critical. Balances include capital or maintenance projects that are in active planning phases. Facility and administrative returns from sponsored projects (grants and contracts) are reinvested in infrastructure or on efforts to obtain additional grant funding. Documented central commitments to initiatives that have been approved at an executive level are designated.

Note C: **Unrestricted Funds Available** - Balance represents reserves available to bridge uneven cash flows as well as future potential reduced funding. Current examples of potential future reductions are: enrollment fluctuations, budget reductions, or holdbacks.

TAB	DESCRIPTION	ACTION
1	IDAHO TECHNOLOGY COUNCIL – DIGITIAL LITERACY PRESENTATION	Information Item
2	EDUCATOR PREPARATION PROGRAMS – PERFORMANCE REPORT	Action Item
3	BOARD POLICY – IV.B – EDUCATOR CERTIFICATION – ENDORSEMENT REQUIREMENTS – SECOND READING	Action Item
4	DYSLEXIA HANDBOOK	Action Item
5	COLLEGE OF SOUTHERN IDAHO – TAXING DISTRICT EXPANSION	Action Item

IDAHO TECHNOLOGY COUNCIL (ITC)

SUBJECT

Idaho Digital Literacy

APPLICABLE STATUTE, RULE, OR POLICY

Idaho Administrative code, IDAPA 08.02.03.104,105,106

BACKGROUND/DISCUSSION

Over the past 12 years the Idaho Technology Council has been working to increase digital literacy in our education system. Several steps have been accomplished towards increasing the talent necessary to grow innovative companies in Idaho. ITC's goal is to have more K-12 students introduced and engaged with digital education, so they are in a better position for career choice and readiness. ITC has accomplished several steps along the digital career readiness continuum over the past decade. The demand for digital literacy from business is extensive as every industry utilizes digital skills to optimize performance and meet consumer demand. A key part of the Idaho Digital Literacy K-12 Plan is to have Computer Science be a requirement for high school graduation beginning in 2025, which will help drive teacher development, curriculum, outreach, and student engagement. ITC's goal is to be the most innovative state in the union and digital literacy with Idaho students is foundational to this goal. Digital literacy will prepare students for their future and Idaho's opportunities in a digitally complex world.

The ITC's areas of focus are for Idaho to have a:

1. Digital Literacy K-12 Plan
2. Teacher Professional Development Plan
3. Idaho Digital Literacy Dashboard

The purpose of a business is to create and keep a customer. The business must generate new products and services to meet their customers' needs today and into the future. Innovation propels states' economies—especially in challenging economic times. There are approximately 5,793 open computing jobs in Idaho currently, with an average salary of $71,947. There were only 577 college graduates in computer science in 2020 and only 38% of all Idaho public high schools teach a foundational computer science course. The "hot jobs" as identified by the Idaho Department of Labor require digital literacy. Digital literacy significantly improves students' future earning power and their preparedness to compete in a highly competitive world.

IMPACT

The purpose of this report is to update the Board on the efforts and work being done to focus efforts on K-12 digital literacy and provide information on the

importance and impact digital literacy skills have on a student's workforce readiness.

ATTACHMENTS

Attachment 1 – Idaho Digital Literacy Facts
Attachment 2 – State by State Digital Literacy Policy Comparison
Attachment 3 – ITC Digital Literacy Dashboard
Attachment 4 – Idaho High School Graduation Minimum Credit Requirements

STAFF COMMENTS AND RECOMMENDATIONS

The Board has been instrumental in implementing provisions over the years to support computer science and digital literacy efforts in Idaho's public schools.

The Board approved the use of specific computer science credits toward the math and science high graduation requirements.

- August/November 2013: Board approved amendments to administrative code (IDAPA 08.02.03 effective March 2014) allowing use of specific computer science and engineering courses to be able to be used to meet the high school math and science graduation requirements.
- August/November 2015: Board approved amendments to administrative code (IDAPA 08.02.02 effective March 2017) creating computer science (6-12) teaching endorsement.
- November 2016: Board approved K-12 computer science content standards.
- August/November 2016: Board approved amendments to administrative code incorporating new computer science standards into administrative code; created additional computer science (5-9) endorsement, effective March 2017.
- August/November 2018: Board approved amendments to administrative code expanding the use of computer science to meet high school math and science graduation requirements.
- August/November 2021: Board approved amendments to administrative code establishing computer science as a subject area under the science graduation requirements.
- August 2022: Board approved proposed amendments to administrative code adding computational thinking and digital literacy as a required area of instruction at the elementary and middle school levels and computer science credits as a high school graduation requirement starting in 2025.
- November 2022: Board approved pending rule without amendments to graduation requirements starting in 2025 based on negative public comments received and limited number of certificated staff with computer science endorsements outside of CTE technology programs. If accepted by the Legislature, the pending rule will become effective at the end of the 2023 legislative session.

BOARD ACTION

This item is for informational purposes only.

Support K-12 Computer Science Education in Idaho

Computer science drives job growth and innovation throughout our economy and society. Computing occupations are the **number 1 source of all new wages in the U.S.** and make up over half of all projected new jobs in STEM fields, making Computer Science one of the most in-demand college degrees. And computing is used all around us and in virtually every field. It's foundational knowledge that all students need. But computer science is marginalized throughout education. Only 53% of U.S. high schools teach any computer science courses and only 4% of bachelor's degrees are in Computer Science. We need to improve access for all students, including groups who have traditionally been underrepresented.

In Idaho, there are currently 5,793 open computing jobs with an average salary of $71,947.

Yet, there were only 577 graduates in computer science in 2020 and only 38% of all public high schools teach a foundational computer science course.

Computer science in Idaho

- Only **475 exams were taken in AP Computer Science by high school students in** Idaho in 2020 (166 took AP CS A and 309 took AP CSP).
- Only 28% were taken by female students (27% for AP CS A and 29% for AP CSP); only 42 exams were taken by Hispanic/Latino/Latina students (1 took AP CS A and 41 took AP CSP); only 3 exams were taken by Black/African American students (1 took AP CS A and 2 took AP CSP); only 3 exams were taken by Native American/Alaskan students (0 took AP CS A and 3 took AP CSP); only 2 exams were taken by Native Hawaiian/Pacific Islander students (0 took AP CS A and 2 took AP CSP).
- Only **26 schools** in ID (25% of ID schools with AP programs) offered an AP Computer Science course in 2019-2020 (11% offered AP CS A and 21% offered AP CSP), which is 10 more than the previous year. There are fewer AP exams taken in computer science than in any other STEM subject area.
- Teacher preparation programs in Idaho only graduated 1 new teacher prepared to teach computer science in 2018.
- According to a representative survey from Google/Gallup, school administrators in ID support expanding computer science education opportunities: 66% of principals surveyed think CS is just as or more important than required core classes. And one of their biggest barriers to offering computer science is the lack of funds for hiring and training teachers.

What can you do to support K-12 CS education in Idaho?

- Send a letter:
  - To your school/district asking them to expand computer science offerings at every grade level: **www.code.org/promote/letter**
  - To your elected officials asking them to support computer science education policy in Idaho: **www.votervoice.net/Code/campaigns/58463/respond**
- Find out if your school teaches computer science or submit information about your school's offerings at **www.code.org/yourschool**.

- Visit **www.code.org/educate/3rdparty** to find out about courses and curriculum from a variety of providers, including Code.org.

Code.org's impact in Idaho

- In Idaho, Code.org's curriculum is used in
  - 28% of elementary schools
  - 31% of middle schools
  - 20% of high schools
- There are 5,038 teacher accounts and 239,895 student accounts on Code.org in Idaho.
- Of students in Idaho using Code.org curriculum last school year,
  - 29% attend high needs schools
  - 51% are in rural schools
  - 43% are female students
  - 6% are Black/African American students
  - 13% are Hispanic/Latino/Latina students
  - 1% are Native American/Alaskan students
  - 1% are Native Hawaiian/Pacific Islander students
  - 60% are white students
  - 4% are Asian students
  - 5% are students who identify as two or more races
- Code.org, its regional partner(s) AVID, and 7 facilitators have provided professional learning in Idaho for
  - 703 teachers in CS Fundamentals (K-5)
  - 103 teachers in Exploring Computer Science or Computer Science Discoveries
  - 44 teachers in Computer Science Principles

What can your state do to improve computer science education?

States and local school districts need to adopt a broad policy framework to provide all students with access to computer science. The following nine recommendations are a menu of best practices that states can choose from to support and expand computer science. Not all states will be in a position to adopt all of the policies. Read more about these 9 policy ideas at **https://code.org/files/Making_CS_Fundamental.pdf** and see our rubric for describing state policies at **http://bit.ly/9policiesrubric**.

☑ **State Plan -** The Idaho STEM Action Center and Idaho Digital Learning Academy developed the Idaho Computing Technology K–12 CS State Plan in 2018. The plan includes goals and strategies to increase access for female students, rural students, low-income students, and students from marginalized racial and ethnic groups underrepresented in computer science.

☑ **K-12 Standards -** Idaho adopted K–12 computer science standards based on the CSTA standards in 2017. Standards within each grade band address concepts of equity, such as bias, accessible technology, and inclusivity.

☑ **Funding -** H0743 (FY 2023) and H0331 (FY 2021) allocated $500K (which was renewed for FY 2022), H0215 (FY 2020) allocated $1M, and H0669 (FY 2019), H0298 (FY 2018), and H0379 (FY 2017) allocated $2M annually for the expansion of computer science.

☑ **Certification -** In Idaho, teachers with existing licensure can obtain a 6–12 or 5–9 endorsement by completing a state-approved program and passing the Praxis CS exam. An initial license in computer science also requires completing a state-approved program and passing the exam. A 6–12 CTE Occupational Specialist certification in computer science can be obtained with industry experience.

☑ **Pre-Service Programs -** The Idaho Department of Education has approved teacher preparation programs leading to certification in computer science and lists these programs publicly.

☑ **Dedicated State Position -** The Idaho Governor's STEM Action Center has a STEM and Computer Science Program Manager.

☑ **Require High Schools to Offer -** H648 (2018) required each school district to make one or more computer science courses available to all high school students by FY 2020. Students must have the option of taking the course as part of their course schedule during normal instructional hours at the school where the student is enrolled. Courses may be offered through virtual education programs and online courses, traditional in-person courses, or a combination of online and in-person instruction.

☑ **Count Towards Graduation -** In Idaho, AP Computer Science or dual-credit computer science can count as one mathematics (after completion of Algebra II) or up to two science credits for graduation.

☑ **IHE Admission -** Under certain conditions, computer science can count as a mathematics or science credit required for admission at institutions of higher education in Idaho.

Follow us!

Join our efforts to give every student in every school the opportunity to learn computer science. Learn more at **code.org**, or follow us on **Facebook** and **Twitter**.

Launched in 2013, Code.org® is a nonprofit dedicated to expanding access to computer science, and increasing participation by women and underrepresented youth. Our vision is that every student in every school should have the opportunity to learn computer science.

Who can you connect with locally to talk about K-12 CS education policy?

- You can reach Code.org's policy contact for your state, Maggie Glennon, at maggie@code.org.

Data is from the Conference Board for job demand, the Bureau of Labor Statistics for state salary and national job projections data, the College Board for AP exam data, the National Center for Education Statistics for university graduate data, the Gallup and Google research study Education Trends in the State of Computer Science in U.S. K-12 Schools for parent demand, the 2018 Computer Science Access Report for schools that offer computer science, and Code.org for its own courses, professional learning programs, and participation data.

K–12 Computer Science Policy and Implementation in States

Code.org's Nine Policy Elements | State-by-state data on the 9 policies | Current Legislation

We are seeing a groundswell of interest and effort from students, parents, teachers, districts, and states to bring computer science into our K–12 system. Tens of millions of students are participating in the Hour of Code. Tens of thousands of teachers are going through professional development to bring computer science into their schools. Hundreds of school districts have embraced computer science in their curriculum. And in the past five years, every state has responded to this growing interest by passing policies to boost computer science.

Our advocacy coalition (https://advocacy.code.org) recommends nine policies states can adopt to make computer science foundational for all students (see: https://code.org/files/Making_CS_Fundamental.pdf). Below is a list of state actions working toward these statewide policies and/or implementation plans for scaling K–12 computer science, including efforts prioritizing equity.

Alaska

- **K-12 CS Standards:** Alaska adopted K–12 computer science standards based on the CSTA standards in 2019. Standards within each grade band address concepts of equity, such as bias, accessible technology, and inclusivity.
- **Dedicated CS Position:** The Alaska Department of Education & Early Development is currently in the process of hiring a Statewide Coding and Computer Science Coordinator.
- **Making CS Count:** Alaska passed a permissive and encouraging policy to allow computer science to count as a mathematics, science, or local CTE/technology credit for graduation, but it is a district decision.

Alabama

- **State Plan:** The Alabama Governor's Computer Science Advisory Council made a series of policy recommendations in 2019, including goals and strategies in 2019 and created a corresponding timeline in 2021. The council was charged with building equity in computer science education for groups underrepresented in computing. The plan includes specific strategies to advance educational equity in computer science.
- **K-12 CS Standards:** Alabama adopted K–12 computer science and digital literacy standards in 2018. The "Equitable Access" Position Statement in the standards document includes examples of ways to broaden participation in computer science education, and the standards address concepts of equity, such as bias, accessible technology, and inclusivity.
- **Funding:** HB 135 (FY 2023) appropriated $5.657M for CS education: $3M for CS4AL, $2.375M for the Technology in Motion Program, and $300K for CS educator training. SB 189 (FY 2022) and HB 187 (FY 2021) appropriated $3.771M and SB 199 (FY 2020) appropriated $2.771M for CS education: $614K for the Middle School Programming Initiative, $300K for

CS educator training, $1 and $2M for CS4AL, and $857K for the Technology in Motion Program to train K–12 teachers in computer science. HB 175 (FY 2019) appropriated $613K for the Middle School Programming Initiative, and an additional $300K was allocated for professional development. SB 129 (FY 2018) allocated $675K for the Middle School Programming Initiative.

- **K-12 CS Certification:** In Alabama, teachers with existing licensure can add 6–12 computer science as an additional teaching field by passing the Praxis CS exam. Teachers can also obtain a course-specific permit by completing an approved training or college credit for the specific course. State funding for computer science can support credentialing for teachers.
- **Preservice Incentives:** In September 2019, the Alabama State Board of Education passed Teacher Educator Standards for Computer Science, which are used to approve programs at institutions of higher education.
- **Dedicated CS Position:** The Alabama State Department of Education has an Education Specialist and an Educator Administrator for Digital Literacy and Computer Science.
- **Requiring All Secondary Schools to Offer CS:** Act 389 (2019) required all high schools, middle schools, and elementary schools to offer computer science by the 2020–2021 school year. The act required the State Department of Education to report the aggregate gender, racial, and socioeconomic diversity of students enrolled in high-quality computer science courses.
- **Making CS Count:** In Alabama, courses including AP Computer Science A or AP Computer Science Principles can count as a mathematics or science credit for graduation.
- **Higher Education Admission:** Computer science can count as a mathematics or science credit required for admission, as determined by each public institution of higher education in Alabama.

Arkansas

- **State Plan:** The Arkansas Department of Education developed and regularly updates a state plan for computer science education on recommendations from the Computer Science and Technology in Public School Task Force in 2016. In October 2020, the Computer Science and Cybersecurity Task Force released a new set of recommendations.
- **K-12 CS Standards:** Arkansas adopted revised K–12 computer science standards including multiple high school pathways in 2020. All students learn the K–8 standards and take a coding block in 7th or 8th grade.
- **Funding:** Act 217 (FY 2023) and Act 1006 (FY 2022) allocated $3.5M for the Computer Science Initiative; Act 154 (FY 2021), Act 877 (FY 2020), Act 243 (FY 2019), Act 1044 (FY 2018), and Act 189 (FY 2016 and 2017) allocated $2.5M annually for the initiative. One grant program for schools prioritizes programs that broaden participation in computer science courses.
- **K-12 CS Certification:** In Arkansas, teachers with existing licensure can add a 4–12 endorsement by passing the Praxis CS exam; teachers can also earn an initial license in computer science. Any teacher with a grade-appropriate license can obtain an approval code by completing one of the following: approved professional development, prior computer science teaching, coursework in computer science, or other department requirements. State funding for computer science can support credentialing for teachers. Beginning with the 2023–2024 school year, each public school district must employ at least one computer science certified teacher at each high school (Act 414, 2021).

- **Preservice Incentives:** Arkansas has approved secondary computer science preparation programs at several institutions of higher education and lists these institutions publicly. The state also requires all preservice elementary teachers to receive instruction in computer science education, and each preservice program will incorporate computer science as their educator competencies come up for revision. ForwARd Arkansas scholarships are available for students studying to become licensed computer science instructors and commit to teaching in a ForwARd Community school district.
- **Dedicated CS Position:** The Arkansas Department of Education has an office of computer science with four staff members focusing on computer science, including the State Director of Computer Science Education, Lead Statewide Computer Science Specialist, Computer Science Program Policy Advisor, and a Computer Science Program Coordinator. There are also nine statewide computer science specialists. In 2021, the department created a new position, the Director of STEM and Computer Science Continuum, to focus on postsecondary, including college and careers.
- **Requiring All Secondary Schools to Offer CS:** Act 187 (2015) required all high schools to offer computer science by the 2015–2016 school year. Each school reports computer science enrollment by grade and race. The Middle School Introduction to Coding standards are required to be taught to all students in at least one of grades 5, 6, 7, or 8.
- **Making CS Count:** In Arkansas, all students must take one credit of computer science to graduate (Act 414, 2021). Any computer science course can count as a mathematics, science, or career focus credit for high school graduation.
- **Higher Education Admission:** Any computer science course can count as a mathematics or science credit required for admission at institutions of higher education, which aligns with Arkansas's high school graduation policy.

Arizona

- **K-12 CS Standards:** Arizona adopted K–12 computer science standards with a focus on equity in 2018. The state intends to close the access gap for underserved populations including students with disabilities, women, and students in underrepresented racial and ethnic groups. Standards within each grade band address concepts of equity, such as bias, accessible technology, and inclusivity.
- **Funding:** HB 2862 (FY 2023), SB 1823 (FY 2022), SB 1692 (FY 2021), HB 2302 (FY 2020), and HB 2663 (FY 2019) included $1M annually for the computer science professional development program, prioritizing schools that currently do not provide computer science instruction. The program requires a 50% match of state funding with private monies or in-kind donations. In addition, HB 2303 (FY 2019) prioritized rural schools and schools with at least 60% of the students eligible for free and reduced-price lunches. HB 2537 (FY 2018) allocated $200K to support standards and professional development. SB 1568 (FY 2017) allocated $500K, with a focus on Native American students.
- **K-12 CS Certification:** In Arizona, teachers with existing licensure can obtain the PreK–8 or 6–12 endorsement by completing a district-approved program or academic coursework in computer science content and teaching methods. The PreK–12 special subject endorsement requires completing academic coursework in computer science content and methods.
- **Dedicated CS Position:** The Arizona Department of Education has a Computer Science and Educational Technology Specialist.
- **Making CS Count:** Arizona passed a permissive and encouraging policy to allow computer science to count as a mathematics credit for graduation, but it is a district decision.

California

- **State Plan:** The California State Board of Education adopted the Computer Science Strategic Implementation Plan in 2019. The plan includes practices and recommendations for equitable outcomes, such as providing culturally responsive training materials to support educators.
- **K-12 CS Standards:** California adopted K–12 computer science standards in 2018. The introduction includes "Issues of Equity," describing equity, access, and representation. Standards within each grade band address concepts of equity, such as bias, accessible technology, and inclusivity. The California NGSS Curriculum Framework also includes major sections on computational thinking and computer science for educators.
- **Funding:** AB 181 (FY 2023) allocated $15M for competitive grants for professional learning to K-12 teachers to provide high-quality instruction in computer science. AB 128 (FY 2022) allocated $5M to establish the Educator Workforce Investment Grant to provide professional development in computer science for K-12 teachers and AB 130 (FY 2022) allocated an additional $15M for the Computer Science Supplementary Authorization Incentive Grant Program. SB 75 (FY 2019) appropriated $22.1M to the Educator Workforce Investment Grant Program, including $5M to support professional learning for computer science teachers, though the state reallocated this funding for COVID-19 relief in April 2020.
- **K-12 CS Certification:** In California, teachers with existing licensure can obtain a supplementary authorization for PreK–12 through academic coursework. The state provided dedicated funding in FY 2022 to offset the cost of computer science certification.
- **Dedicated CS Position:** The California Department of Education has a Computer Science Coordinator.
- **Making CS Count:** California passed a permissive and encouraging policy to allow computer science to count as a science or mathematics credit for graduation, but it is a district decision.
- **Higher Education Admission:** Approved computer science courses can count as the recommended third-year science course (area D) or as a mathematics credit (area C) required under the University of California system admissions criteria, which aligns with the high school graduation policy.

Colorado

- **K-12 CS Standards:** Although Colorado does not yet have a discrete set of rigorous computer science standards across K–12, the state adopted high school computer science standards in 2018.
- **Funding:** HB 22-1329, SB 21-205 (FY 2022), HB 20-1360 (FY 2021), and SB 19-207 (FY 2020) appropriated $801,681, $801,658, $801,675, and $1,048,600 for Computer Science Education Grants for Teachers, which give priority to applications serving rural areas, areas with high numbers of students eligible for free and reduced-price meals, or areas with high numbers of students from underrepresented racial and ethnic groups. HB 18-1322 (FY 2019) allocated $500K for K–5 teacher professional development. SB 17-296 (FY 2018 and 2019) allocated up to $500K annually for teachers pursuing postsecondary computer science education. HB 16-1289 (FY 2017) offered schools $1K for each student enrolled in AP computer science. Due to COVID-19 related budget cuts, the state reduced funding for FY 2021 from planned allocations ($250K annually for FY 2021, 2022, and 2023 in HB 19-1277).

- **Dedicated CS Position:** The Colorado Department of Education has a Computer Science Content Specialist.
- **Making CS Count:** Colorado passed a permissive and encouraging policy to allow computer science to count as either a mathematics or science credit for graduation, but it is a district decision.
- **Higher Education Admission:** A computer science course with a mathematics prerequisite can count as a mathematics credit required for admission at institutions of higher education in Colorado.

Connecticut

- **State Plan:** The Connecticut State Board of Education adopted a computer science plan in 2020. The plan includes recommendations to reduce gaps in access to computer science courses for female students, students with high-need, and students from marginalized racial and ethnic groups underrepresented in computer science. The plan also targets diverse representation in teachers of computer science courses.
- **K-12 CS Standards:** Connecticut adopted the CSTA K–12 Computer Science Standards in 2018. Standards within each grade band address concepts of equity, such as bias, accessible technology, and inclusivity.
- **Funding:** Although SB 957 (2019) created a fund for computer science, no funding has been dedicated yet.
- **K-12 CS Certification:** In Connecticut, teachers with existing licensure can obtain the K–6 or 7–12 endorsement through academic coursework or passing the Praxis CS exam (approved in December 2019).
- **Preservice Incentives:** SB 957 (2019) required teacher preparation programs to include, as part of the curriculum for all preservice candidates, instruction in computer science that is grade-level and subject-area appropriate.
- **Dedicated CS Position:** The Connecticut Department of Education has a Computer Science Education Consultant.
- **Requiring All Secondary Schools to Offer CS:** SB 957 (2019) added computer science to the list of subjects that public schools must teach, with implementation by the 2019–2020 school year.
- **Making CS Count:** Connecticut passed a permissive and encouraging policy for local boards of education to allow computer science courses aligned to the state computer science standards to count towards the nine STEM credits required for graduation (beginning with the class of 2023).

District of Columbia

- **K-12 CS Certification:** In DC, teachers with existing licensure can obtain a 7–12 certification by passing the Praxis CS exam. An initial license in computer science requires academic coursework and passing the exam.
- **Making CS Count:** In DC, an AP computer science course can count as the fourth-year upper-level mathematics credit for graduation.

Delaware

- **K-12 CS Standards:** Delaware adopted the CSTA K–12 Computer Science Standards in 2018. The "Equity" section in the Implementation Guidelines includes examples of ways to broaden participation in computer science education, and standards within each grade band address concepts of equity, such as bias, accessible technology, and inclusivity.
- **Dedicated CS Position:** Although the Delaware Department of Education does not have a position dedicated to computer science education, the STEM Education Associate oversees computer science education.
- **Requiring All Secondary Schools to Offer CS:** HB 15 (2017) required all high schools to offer computer science by the 2020–2021 school year.
- **Making CS Count:** In Delaware, an Advanced Placement, honors, college prep, or integrated computer science course meeting the computer science and mathematics standards can count as the fourth mathematics credit for graduation.

Florida

- **K-12 CS Standards:** Florida adopted K–12 computer science standards as a strand within the state science standards in 2016. Benchmarks within each grade band address concepts of equity, such as bias, accessible technology, and inclusivity.
- **Funding:** HB 5001 (FY 2023), SB 2500 (FY 2022), HB 5001 (FY 2021), and SB 2500 (FY 2020) allocated $10M annually for computer science teacher certification and professional development. SB 7070 (FY 2019) established recruitment awards for newly hired teachers who are content experts in computer science.
- **K-12 CS Certification:** In Florida, teachers can obtain the K–12 certification as an initial license or an add-on endorsement through academic coursework. State funding for computer science can be used to support credentialing for teachers.
- **Dedicated CS Position:** The Florida Department of Education has a Computer Science Program Specialist.
- **Requiring All Secondary Schools to Offer CS:** HB 495 (2018) required all middle and high schools to offer computer science or provide students access via the Florida Virtual School if a district is unable to provide access.
- **Making CS Count:** In Florida, computer science can count as a math or science credit for graduation (HB 7071 in 2019 removed the industry certification requirement).

Georgia

- **State Plan:** The Georgia Department of Education developed a state plan for expanding computer science in 2018. The plan includes strategies to build diversity in computer science education, which includes rural and economically challenged communities.
- **K-12 CS Standards:** Although Georgia does not yet have a discrete set of rigorous computer science standards across K–12, K–8 computer science standards were adopted in 2019, and an alignment document with the high school CTE standards is in progress.
- **Funding:** HB 911 (FY 2023) and SB 81 (FY 2022) appropriated $1M, HB 793 (FY 2021)/HB 80 (in 2021 for the current fiscal year) appropriated $717,275,and HB 31 (FY 2020) appropriated $750K for the grant program established by SB 108 (FY 2019). HB 911 (FY 2023) also appropriated $600K to provide professional development and student support for a computer science pilot program in rural Georgia. SB 81 (FY 2022) appropriated $250K for a pilot program for AP CS Principles. HB 683 (FY 2018) appropriated $500K for middle school coding and teacher professional development. In FY 2016, the Governor's Office of

Student Achievement Innovation Funds allocated $250K for the expansion of computer science.

- **K-12 CS Certification:** In Georgia, teachers with existing licensure can obtain a 6–12 academic endorsement by passing the Georgia GACE Computer Science Assessment. An initial license in computer science requires completing a state-approved program.
- **Preservice Incentives:** The Georgia Department of Education has approved teacher preparation programs leading to certification in computer science and lists these programs publicly.
- **Dedicated CS Position:** The Georgia Department of Education has a Computer Science Education Program Specialist.
- **Requiring All Secondary Schools to Offer CS:** SB 108 (2019) required all high schools to offer computer science beginning in the 2024–2025 school year. The state set incremental requirements for each year, requiring that at least one high school in each local school system offers a course by the 2022–2023 school year, and half of all high schools offer a course by the 2023–2024 school year. Further, all middle schools must offer instruction in exploratory computer science by the 2022–2023 school year, and it is recommended for all elementary schools.
- **Making CS Count:** Of the approved computing courses in Georgia, nine can count as the fourth mathematics credit or the fourth science credit for graduation.
- **Higher Education Admission:** Computer science can count as a science or foreign language credit required for admission at institutions of higher education, which aligns with Georgia's high school graduation policy.

Hawaii

- **State Plan:** The Hawaii State Department of Education developed a state plan for expanding computer science access in 2018. The plan includes a section focused on goals to increase diversity and equity in computer science.
- **K-12 CS Standards:** Hawaii adopted the CSTA K–12 Computer Science Standards in 2018. Standards within each grade band address concepts of equity, such as bias, accessible technology, and inclusivity.
- **Funding:** Although Hawaii does not currently provide dedicated state funding, HB 2607 (FY 2019) dedicated $500K to computer science teacher professional development and required grantees to address how they plan to instruct teachers to effectively teach students in computer science, including students from demographic groups that are historically underrepresented in computer science. In 2019, the state budget increased the weighted per-pupil funding to schools by $3M, directing that schools use some of these funds to implement computer science curriculum.
- **K-12 CS Certification:** In Hawaii, teachers with existing licensure can obtain a K–6, 6–12, or K–12 certification by completing a state-approved teacher education program, passing the Praxis CS exam, coursework and experience, professional development and experience, or holding a certification from another state and experience. The state also has a limited license for individuals with CS industry experience.
- **Dedicated CS Position:** The Hawaii Department of Education has a Computer Science Specialist.
- **Requiring All Secondary Schools to Offer CS:** Act 51 (2018) required all high schools to offer at least one computer science course by the 2021–2022 school year, and Act 158 (2021) required all middle, elementary, and charter schools to offer computer science by the

2024–2025 school year. Beginning with the 2022–2023 school year, at least one public elementary school and one public middle/intermediate school in each Complex Area shall offer computer science courses or content. The state set incremental requirements for each year to phase in the requirements. Act 158 also required the department to submit an annual report on the computer science offerings and enrollment, disaggregated by student demographics.

- **Making CS Count:** In Hawaii, AP computer science can count as the fourth mathematics credit required for the Academic or STEM Honors Recognition Certificate for graduation.

Iowa

- **State Plan:** The Iowa Department of Education developed a state plan for expanding access to computer science in 2022.
- **K-12 CS Standards:** Iowa adopted the CSTA K–12 Computer Science Standards in 2018. Standards within each grade band address concepts of equity, such as bias, accessible technology, and inclusivity.
- **Funding:** HF 2575 (FY 2023), HF 868 (FY 2022), HF 2643 (FY 2021), HF 758 (FY 2020) and HF 642 (FY 2019) allocated $500K annually for computer science professional development. Another $500K was added to the fund in FY 2019. The grant rubric prioritizes targeted efforts to increase computer science participation by underrepresented groups (including female students, economically disadvantaged students, and students who are Black/African American, Hispanic/Latino/Latina, American Indian/Alaskan, or Native Hawaiian/Pacific Islander).
- **K-12 CS Certification:** In Iowa, teachers with existing licensure can obtain a 5–12 or K–8 endorsement by completing a state-approved program or academic coursework in both content and methods. The state waived these requirements in 2018 for teachers who could demonstrate content knowledge and successful teaching experience.
- **Dedicated CS Position:** The Iowa Department of Education has a Computer Science Education Program Consultant.
- **Requiring All Secondary Schools to Offer CS:** HF 2629 (2020) required all high schools to offer computer science by July 1, 2022, and required all elementary and middle schools to offer computer science in at least one grade level by July 1, 2023.
- **Making CS Count:** Iowa passed a permissive and encouraging policy to allow computer science to count as a mathematics credit for graduation, but it is a district decision.
- **Higher Education Admission:** Computer science can count towards a core subject area credit required for admission at institutions of higher education in Iowa.

Idaho

- **State Plan:** The Idaho STEM Action Center and Idaho Digital Learning Academy developed the Idaho Computing Technology K–12 CS State Plan in 2018. The plan includes goals and strategies to increase access for female students, rural students, low-income students, and students from marginalized racial and ethnic groups underrepresented in computer science.
- **K-12 CS Standards:** Idaho adopted K–12 computer science standards based on the CSTA standards in 2017. Standards within each grade band address concepts of equity, such as bias, accessible technology, and inclusivity.
- **Funding:** H0743 (FY 2023) and H0331 (FY 2021) allocated $500K (which was renewed for FY 2022), H0215 (FY 2020) allocated $1M, and H0669 (FY 2019), H0298 (FY 2018), and

H0379 (FY 2017) allocated $2M annually for the expansion of computer science.

- **K-12 CS Certification:** In Idaho, teachers with existing licensure can obtain a 6–12 or 5–9 endorsement by completing a state-approved program and passing the Praxis CS exam. An initial license in computer science also requires completing a state-approved program and passing the exam. A 6–12 CTE Occupational Specialist certification in computer science can be obtained with industry experience.
- **Preservice Incentives:** The Idaho Department of Education has approved teacher preparation programs leading to certification in computer science and lists these programs publicly.
- **Dedicated CS Position:** The Idaho Governor's STEM Action Center has a STEM and Computer Science Program Manager.
- **Requiring All Secondary Schools to Offer CS:** H648 (2018) required each school district to make one or more computer science courses available to all high school students by FY 2020. Students must have the option of taking the course as part of their course schedule during normal instructional hours at the school where the student is enrolled. Courses may be offered through virtual education programs and online courses, traditional in-person courses, or a combination of online and in-person instruction.
- **Making CS Count:** In Idaho, AP Computer Science or dual-credit computer science can count as one mathematics (after completion of Algebra II) or up to two science credits for graduation.
- **Higher Education Admission:** Under certain conditions, computer science can count as a mathematics or science credit required for admission at institutions of higher education in Idaho.

Illinois

- **K-12 CS Standards:** Illinois adopted K–12 computer science standards based on the CSTA standards in 2022. Standards within each grade band address concepts of equity, such as bias, accessible technology, and inclusivity.
- **K-12 CS Certification:** In Illinois, teachers with existing licensure can obtain a 5–8, 6–8, or 9–12 endorsement through academic coursework, including computer science teaching methods and passing the state content exam.
- **Dedicated CS Position:** The Illinois State Board of Education has a Computer Science Principal Consultant.
- **Requiring All Secondary Schools to Offer CS:** HB 2170 (2021) required each school district that maintains any of the grades 9 through 12 provide an opportunity for every high school student to take at least one computer science course by the 2023–2024 school year.
- **Making CS Count:** In Illinois, computer science can count as a mathematics credit for graduation.
- **Higher Education Admission:** Computer science can count as a mathematics credit required for admission at institutions of higher education, which aligns with Illinois's high school graduation policy.

Indiana

- **State Plan:** The Indiana Department of Education created a state plan for computer science education implementation in 2019. The plan includes a section focused on goals and strategies to increase participation for female students, students with disabilities, rural

students, and students from marginalized racial and ethnic groups underrepresented in computer science.

- **K-12 CS Standards:** Indiana published a comprehensive set of K–12 computer science standards in 2018.
- **Funding:** HEA 1001 (FY 2023, 2022, 2021, and 2020) allocated $3M annually for teacher professional development. SEA 172 (FY 2019) required the Department of Education to contract with a provider to offer professional development.
- **K-12 CS Certification:** In Indiana, teachers with existing licensure can obtain a 5–12 or preK–12 academic endorsement by passing the state-adopted content exam. An initial license in computer science requires completing a state-approved program and passing the exam. The state has a CTE Workplace Specialist license for individuals with occupational experience. The educator standards for the new elementary STEM license addition include computer science.
- **Preservice Incentives:** The Indiana Department of Education has approved computer science teacher preparation programs leading to certification in computer science and lists these programs publicly. In 2020, Indiana began requiring all preservice K–6 teachers to learn computer science.
- **Dedicated CS Position:** The Indiana Department of Education has a Computer Science Specialist.
- **Requiring All Secondary Schools to Offer CS:** SEA 172 (2018) required all elementary, middle, and high schools to offer computer science by the 2021–2022 school year. SEA 295 (2020) required the Department of Education to post an annual report on computer science course enrollment disaggregated by race, gender, grade, ethnicity, limited English proficiency, free and reduced lunch status, and eligibility for special education.
- **Making CS Count:** In Indiana, AP Computer Science, IB Computer Science, Cambridge International CS, Industrial Automation and Robotics, or CTE CS I or II can count as a mathematics or quantitative reasoning credit required for graduation. Computer science can also count as the third science requirement.
- **Higher Education Admission:** Computer science can count as a mathematics or science credit required for admission at institutions of higher education, which aligns with Indiana's high school graduation policy.

Kansas

- **State Plan:** Although Kansas has not yet created a plan for K–12 computer science, the State Board of Education adopted five policy recommendations from the Department of Education’s Computer Science Education Task Force in 2020. The five recommendations include encouraging all schools to offer computer science, allowing computer science to satisfy a core graduation requirement, create a licensure endorsement, and arrange funding to carry out these goals.
- **K-12 CS Standards:** Kansas adopted preK–12 computer science standards in 2019. A primary goal of the standards is to increase the availability of rigorous computer science for all students, especially those who are members of underrepresented groups.
- **Funding:** HB 2567 (FY 2023) allocated $1M to provide grants to high-quality professional learning providers to develop and implement computer science teacher professional development programs.
- **K-12 CS Certification:** The Kansas State Department of Education has developed proposed licensure standards for preK-12 computer science educators.

- **Preservice Incentives:** HB 2466 (2022) established the computer science educator program to promote the advancement of computer science licensed and preservice teacher preparation in Kansas. The state board of regents may award scholarships up to $1,000 to licensed and preservice teachers who are enrolled in a course of instruction offered by a postsecondary educational institution for additional postsecondary credit or leading to licensure as a teacher, and have completed one course in computer science. Scholarships prioritize applicants who are from underrepresented socioeconomic demographic groups; or agree to teach computer science in rural schools and schools with higher percentages of students from underrepresented socioeconomic demographic groups.
- **Dedicated CS Position:** The Kansas Department of Education has a Computer Science Education Program Consultant.
- **Requiring All Secondary Schools to Offer CS:** HB 2466 (2022) required all secondary schools to offer at least one computer science course beginning in the 2023-24 school year or requires a school district to submit a plan to the state board of education describing how the district intends to offer a computer science course and the school year that course will first be offered.
- **Making CS Count:** In Kansas, locally-approved computer science courses can count as a credit for graduation, but it is a district decision.

Kentucky

- **State Plan:** The Kentucky Department of Education developed a state plan for K–12 computer science in 2022 as required by SB 193 (2020).
- **K-12 CS Standards:** Kentucky adopted K–12 computer science standards in 2019.
- **Funding:** HB 2000 (FY 2020) dedicated $800K to the CS and IT academy to address growth in computer science learning. The funding is dedicated to student exam vouchers, teacher K–12 computer science professional learning, and teacher industry certifications.
- **K-12 CS Certification:** In Kentucky, teachers with existing licensure can obtain an 8–12 endorsement in computer science.
- **Dedicated CS Position:** The Kentucky Department of Education has a dedicated K–12 Computer Science Lead.
- **Making CS Count:** Kentucky passed a permissive and encouraging policy to allow computer science to count as an elective science credit or a fourth-year mathematics credit for graduation, but it is a district decision. The course must involve computational thinking, problem-solving, computer programming, and a significant emphasis on the science and engineering practices.
- **Higher Education Admission:** In Kentucky, computer science can count as a mathematics credit required for admission at institutions of higher education if the K–12 district allows the student to fulfill a mathematics graduation credit via the computer science course.

Louisiana

- **State Plan:** SB 190(2022) establishes the Computer Science Education Advisory Commission to provide recommendations to the State Board of Elementary and Secondary Education through the state Department of Education for the development and implementation of a state action plan for the delivery of education in computer science in all public schools. The organizational meeting of the advisory committee will be called by August 15, 2022.

- **K-12 CS Certification:** In Louisiana, teachers with existing licensure can add a 6–12 specialty content area in computer science through academic coursework and/or passing the Praxis CS exam.
- **Making CS Count:** In Louisiana, AP Computer Science A can count as an advanced mathematics credit for graduation.
- **Higher Education Admission:** AP Computer Science A can count as a mathematics credit required for admission at institutions of higher education in Louisiana.

Massachusetts

- **State Plan:** The Massachusetts Department of Elementary and Secondary Education created the 2019 Digital Literacy Now 3 Year Plan, which includes goals, strategies, and timelines for advancing K–12 computer science. One goal of the plan is to focus on ensuring that female students, students from marginalized racial and ethnic groups, and underserved populations receive high-quality instruction.
- **K-12 CS Standards:** Massachusetts adopted K–12 digital literacy and computer science standards in 2016.
- **Funding:** H4000 (FY 2020) allocated $1M for the implementation of engaging and rigorous Digital Learning Computer Science education; $590K went to the Digital Literacy Now grant program for school district teams to develop digital literacy and computer science state plans and complete professional development. The grant program prioritizes underserved students, including economically disadvantaged students, English language learners, students receiving special education services, students from marginalized racial and ethnic groups, and students in rural areas. H4800 (FY 2019) and H3650 (FY 2016) allocated $850K and $1.7M for professional development and implementation support and required a one-to-one private match.
- **K-12 CS Certification:** In Massachusetts, teachers with or without existing licensure can obtain a 5–12 certification by demonstrating competency in each of the computer science standards through a combination of academic coursework, professional development, mentorship experience, teaching experience, passing the Pearson and/or Praxis CS exam, and/or by completing an approved teacher preparation program.
- **Preservice Incentives:** The Massachusetts Department of Elementary and Secondary Education has approved teacher preparation programs leading to certification in computer science and lists these programs publicly.
- **Dedicated CS Position:** The Massachusetts Department of Elementary and Secondary Education has a Computer Science Content Coordinator.
- **Making CS Count:** In Massachusetts, a computer science course can substitute for either a mathematics or laboratory science course if the course includes rigorous mathematical or scientific concepts and aligns with the state computer science standards. Students in technical and vocational programs may substitute a computer science course for a foreign language.
- **Higher Education Admission:** A computer science course can count as a mathematics, science, or foreign language credit required for admission at institutions of higher education if the course meets certain criteria.

Maryland

- **State Plan:** The Maryland Center for Computing Education developed a state plan for computer science in 2018. The plan addresses efforts to increase enrollment in computer science courses for female students, students with disabilities, and students from marginalized racial and ethnic groups underrepresented in computer science.
- **K-12 CS Standards:** Maryland approved K–12 computer science standards aligned to the CSTA standards in 2018. Standards within each grade band address concepts of equity, such as bias, accessible technology, and inclusivity. Maryland is currently developing standards' annotations, which assist teachers as they implement lessons aligned to the standards.
- **Funding:** HB 281 (FY 2020 and 2021) allocated $1M annually, an additional $1M was allocated in HB 588 (FY 2022), and SB 185 (FY 2019) allocated $5M for the computer science education initiative. The grants prioritize applications that focus on serving areas with high poverty, rural areas, students with disabilities, female students, or students from marginalized racial and ethnic groups.
- **K-12 CS Certification:** In Maryland, teachers with existing licensure can obtain a 7–12 endorsement through academic coursework or passing the Praxis CS exam. An initial computer science licensure requires completing academic coursework and passing the exam. Pathways for CTE, alternative certification, and an accelerated certificate also exist. A stipend is available through the MCCE for teachers who pass the exam.
- **Preservice Incentives:** The Maryland State Department of Education has approved teacher preparation programs leading to certification in computer science and lists these programs publicly. MCCE provides funding for public or private teacher preparation institutions to establish computer science education programs or integrated computer science into existing programs via HB 281 (2018).
- **Dedicated CS Position:** The Maryland State Department of Education has a Computer Science Education Specialist as well as a Career Programs, STEM, and Computer Science Coordinator who work with the Director of the Maryland Center for Computing Education to oversee computer science education. Each local school system has also designated a central office administrator who is the point of contact for computer science.
- **Requiring All Secondary Schools to Offer CS:** HB 281 (2018) required all high schools to offer at least one computer science course by the 2021–2022 school year, all middle schools are required to teach computational thinking, and all school boards are asked to incorporate computer science in each elementary school and to increase the enrollment of female students, students with disabilities, and students of underrepresented ethnic or racial groups. The Maryland Computing Education dashboards provide, among other data points, school system and high school data.
- **Making CS Count:** In Maryland, Foundations of Computer Science, Computer Science Principles, AP Computer Science A, and other computer science courses can fulfill the credit requirement in Computer Science, Engineering, or Technology Education. AP Computer Science A can also count as one of the four mathematics credits for graduation.
- **Higher Education Admission:** AP Computer Science can count as one of the four mathematics credits required for admission at institutions of higher education, as long as computer science is not the final year course, which aligns with Maryland's high school graduation policy.

Maine

- **State Plan:** The Maine Department of Education developed a state plan for computer science in January 2020 as required by LD 1382. Previously, a task force established by LD 398 (2017) presented recommendations to recognize computer science in the path to proficiency.
- **Funding:** LD 127 (FY 2022 and 2023) allocated $50K annually to establish a pilot program to provide professional development grants for computer science instruction. The grants prioritize applicants that serve socioeconomically disadvantaged school districts or prioritize student populations traditionally underrepresented in computer science.
- **Dedicated CS Position:** The Maine Department of Education has a Secondary Digital Learning and Computer Science Specialist.
- **Making CS Count:** Maine passed a policy in 2019 to allow computer science to count as a credit for graduation, but it is a district decision.

Michigan

- **K-12 CS Standards:** Michigan adopted the CSTA K–12 Computer Science Standards in 2019. Standards within each grade band address concepts of equity, such as bias, accessible technology, and inclusivity.
- **Funding:** The MiSTEM council uses $450K in funds allocated from SB 845 (FY 2023), HB 4411 (FY 2022), SB 927 (FY 2021) to offer professional development for educators in computer science, as approved by the MiSTEM council.
- **K-12 CS Certification:** Michigan phased out the computer science endorsement in 2017 so that any licensed teacher is eligible to teach computer science.
- **Preservice Incentives:** After Michigan phased out the computer science certification, teacher preparation programs in the state also phased out preservice programs in computer science education.
- **Dedicated CS Position:** The Michigan Department of Education has a Computer Science Consultant.
- **Making CS Count:** In Michigan, any department-approved computer science course can count as the fourth mathematics credit for graduation or replace the Algebra II requirement.

Minnesota

- **Funding:** Although Minnesota does not provide dedicated state funding, MN was awarded a federal grant under the Jacob K. Javits Gifted and Talented Students Education Program to develop a screening process to identify students gifted in computer science, particularly from limited English or marginalized racial and ethnic groups. Schools that participate receive ongoing professional development, and all students receive computer science instruction.
- **Dedicated CS Position:** The Minnesota Department of Education has a STEM and Computer Science Integration Specialist.
- **Making CS Count:** In Minnesota, computer science can count as a mathematics credit for graduation if the course meets state academic standards in mathematics.

Missouri

- **State Plan:** Missouri SB 718 establishes the "Computer Science Education Task Force" to develop a strategic plan for expanding a statewide computer science education program.

- **K-12 CS Standards:** Missouri adopted K–12 computer science standards in 2019. Standards within each grade band address concepts of equity, such as bias, accessible technology, and inclusivity.
- **Funding:** HB 3002 (FY 2023) and HB 2 (FY 2020, 2021, 2022) allocated $450K annually to the Computer Science Education fund created by HB 3 (2018 special session). Grant awardees must describe how they will reach and support students from marginalized racial and ethnic groups underrepresented in computer science.
- **K-12 CS Certification:** In Missouri, teachers can obtain a 9–12 certification through academic coursework or by passing the state content exam. Teachers can be authorized to teach computer science after completion of department-approved professional development. State funding for computer science can be used to support credentialing for teachers.
- **Dedicated CS Position:** SB 718 (2022) directs the Missouri Department of Elementary and Secondary Education to appoint a computer science advisor to implement the bill's requirement for all elementary, middle, and high schools to offer computer science.
- **Requiring All Secondary Schools to Offer CS:** SB 718 (2022) required each public high school and charter school to offer at least one computer science course in an in-person setting or as a virtual or distance course option by the 2023-34 school year.
- **Making CS Count:** In Missouri, any computer science course that aligns to the standards and has an appropriately qualified teacher can count as a mathematics, science, or practical arts credit for graduation.
- **Higher Education Admission:** Beginning July 1, 2023, computer science courses counted toward state graduation requirements shall be equivalent to one science or practical arts credit for the purpose of satisfying admission requirements at any public institution of higher education in the state.

Mississippi

- **State Plan:** The Mississippi Department of Education developed a 10-year strategic plan for statewide computer science education. The plan addresses efforts to increase enrollment in computer science courses for female students and students from marginalized racial and ethnic groups underrepresented in computer science.
- **K-12 CS Standards:** Mississippi adopted K–12 computer science standards based on the CSTA standards in 2018. Standards within each grade band address concepts of equity, such as bias, accessible technology, and inclusivity.
- **Funding:** HB 1600 (FY 2023) and HB 1837 (FY 2022) allocated $1M to develop computer science courses and professional development. HB 1700 (FY 2021) allocated $300K for computer science professional development. HB 1643 (FY 2020) allocated $300K to develop computer science courses and professional development.
- **K-12 CS Certification:** In Mississippi, teachers with existing licensure can obtain an AP Computer Science Principles Endorsement by completing an approved AP training. Teachers can also obtain a K–8 or 7–12 add-on endorsement by completing coursework or approved professional development for specific courses.
- **Requiring All Secondary Schools to Offer CS:** HB 633 (2021) required all schools (elementary, middle, and high) to offer instruction in computer science by the 2024–2025 school year. The state set incremental requirements for each year, requiring that all middle schools offer instruction in foundations of computer science and half of all elementary schools in each school district offer at least one hour of computer science instruction per week by the 2022–2023 school year. Half of all high schools in each school district must

offer a course in computer science and all elementary schools must offer at least on hour of computer science instruction per week by the 2023–2024 school year. Further, all charter schools that serve middle or high school students must offer a course in computer science and all charter schools that serve elementary school students must offer instruction in computer science by the 2022–2023 school year.

- **Making CS Count:** Beginning with incoming freshmen of 2018–2019, all Mississippi students must earn one credit in technology or computer science. Multiple computer science courses may satisfy the graduation credit.
- **Higher Education Admission:** All students applying to state institutions of higher learning in Mississippi for entrance in Fall 2022 must have earned one credit in computer science or technology, which aligns with the high school graduation policy.

Montana

- **K-12 CS Standards:** Montana adopted K–12 computer science standards in November 2020. Standards within each grade band address many concepts of equity, such as bias, accessible technology, and inclusivity.
- **Funding:** HB 644 (FY 2022-23) allocated $32K to support the development of computer programming courses at high schools on Indian reservations across Montana and support professional development for high school teachers.
- **K-12 CS Certification:** In Montana, teachers with existing licensure can obtain a K–12 endorsement through academic coursework. An initial license in computer science requires completing a teacher preparation program and passing the Praxis CS exam, or completing a non-traditional teaching program with five years of successful teaching experience.
- **Preservice Incentives:** The Montana Office of Public Instruction has approved teacher preparation programs leading to certification in computer science and lists these programs publicly.
- **Making CS Count:** Montana passed a permissive and encouraging policy to allow computer science to count as a science, mathematics, elective, or CTE graduation requirement, but it is a district decision. Alternatively, a district may increase the local requirements in math, science, or career and technical education and allow a computer science course to fulfill one of the required credits, or establish a stand-alone requirement that all students complete a computer science credit.

North Carolina

- **State Plan:** The North Carolina Department of Public Instruction developed—and presented to the legislature—a state plan for expanding computer science in 2018. The plan includes strategies to engage students from marginalized racial and ethnic groups underrepresented in computer science, female students, and low-income students.
- **K-12 CS Standards:** North Carolina adopted K–12 computer science standards in August 2020, as required by HB 155 (2017). Standards within each grade band address concepts of equity, such as bias, accessible technology, and inclusivity.
- **Funding:** SL 2021-180 (FY 2022 and FY 2023) allocated $3.6M (FY 2022) and $1.1M (FY 2023) to support regional computer science consultants and to provide training for K-12 computer science teachers. SL 2018-5 (FY 2019, continued in FY 2020) allocated $500K annually for implementation of the Computer Science Education Plan, which focuses on increasing participation for underrepresented student groups, including female students, low-

income students, and students from marginalized racial and ethnic groups. Additionally, SL 2017-57 allocated $400K for FY 2018 and $800K for the following years (FY 2019, FY 2020) for the Coding and Mobile Application Grant Program, which could be used for teacher professional development in computer science.

- **K-12 CS Certification:** In North Carolina, teachers with existing CTE licensure can obtain a 9–12 CTE computer programming endorsement through academic coursework.
- **Dedicated CS Position:** The North Carolina Department of Public Instruction has a Director of Computer Science and Technology.
- **Making CS Count:** In North Carolina, computer science can count as the fourth mathematics credit for graduation in the Future-Ready Core track.

North Dakota

- **State Plan:** The North Dakota Department of Public Instruction developed a plan for K–12 computer science education.
- **K-12 CS Standards:** North Dakota adopted K–12 computer science and cybersecurity standards in 2019, becoming the first state to create K–12 cybersecurity standards.
- **K-12 CS Certification:** In North Dakota, teachers with existing licensure can obtain a grade level corresponding credential through academic coursework. Teachers are eligible to teach specific computer science courses for five years after earning a Level I (200 hours), Level II (40 hours), or Level III (15 hours) Computer Science and Cybersecurity Credential (effective April 1, 2020). Teachers can renew the credential by completing 30 hours of academic work during the five year period.
- **Making CS Count:** In North Dakota, AP Computer Science A or Mathematics for Computer Science/Information Technology can count as a mathematics credit for graduation.

Nebraska

- **State Plan:** The Nebraska Department of Education is in the process of developing a state plan for K–12 computer science.
- **K-12 CS Standards:** The Nebraska Senate passed a bill requiring the Board of Education to adopt measurable academic content standards for computer science and technology education under the mathematics, science, or career and technical education standards.
- **Requiring All Secondary Schools to Offer CS:** LB 1112 (2022) required each school district to include computer science and technology education in the instructional program of its elementary and middle schools, as appropriate, and beginning in school year 2026-27, require each student attending a public school to complete at least one five credit high school course/one-semester high school course in computer science and technology prior to graduation.
- **Making CS Count:** In Nebraska, all students must take a five credit course or a one semester course of computer science to graduate (LB 1112, 2022).

New Hampshire

- **State Plan:** New Hampshire developed a plan for expanding computer science in 2018.
- **K-12 CS Standards:** New Hampshire adopted K–12 computer science standards based on the CSTA standards in 2018. Standards within each grade band address concepts of equity, such as bias, accessible technology, and inclusivity.

- **K-12 CS Certification:** In New Hampshire, teachers with or without existing licensure can obtain certification by passing a national exam, holding a computer science teaching assignment prior to June 2019, or submitting evidence of skills, knowledge, and competencies in computer science content. Evidence could include coursework, professional experience, letters of recommendation, professional development, or other artifacts.
- **Preservice Incentives:** The New Hampshire Department of Education has approved teacher preparation programs leading to certification in computer science and lists these programs publicly.
- **Dedicated CS Position:** The New Hampshire Department of Education has a STEM Integration and Computer Science Administrator.
- **Requiring All Secondary Schools to Offer CS:** HB 1674 (2018) required all schools to create and implement computer science programs with a target goal of 2020 for full implementation.
- **Making CS Count:** New Hampshire passed a permissive and encouraging policy to allow computer science to count as a mathematics or technology credit for graduation, but it is a district decision.

New Jersey

- **State Plan:** The New Jersey Department of Education developed a state plan for computer science education implementation in 2019. The plan includes a section on equity and promotes equitable access in the mission and vision statements.
- **K-12 CS Standards:** New Jersey adopted revised computer science and design thinking standards in June 2020. The standards' vision statement focuses on equitable access for all students and fostering their ability to participate in an inclusive and diverse computing culture that appreciates and incorporates perspectives from people of different genders, ethnicities, and abilities. Standards within each grade band address concepts of equity, such as bias, accessible technology, and inclusivity.
- **Funding:** SB 2023 (FY 2023) and SB 2022 (FY 2022) allocated $2M and A4720 (FY 2021) included $800K for the K–12 Computer Science Education Initiative. The Secondary School Computer Science Education Initiative (PL 2018, Chapter 53) allocated $2M for FY 2019. SB 2500 renewed the $2M appropriation for FY 2020, but was later not included in the revised FY 2020 budget by NJ A3 (20R).
- **K-12 CS Certification:** In New Jersey, teachers with existing licensure can obtain a 9–12 CTE endorsement with a combination of previous teaching experience and academic coursework.
- **Dedicated CS Position:** The New Jersey Department of Education has a Computer Science Coordinator.
- **Requiring All Secondary Schools to Offer CS:** A2873 (2018) required all high schools to offer a course in computer science by the 2018–2019 school year. S990 (2020) required the department to report on computer science course enrollment disaggregated by gender, race and ethnicity, special education status, English language learner status, eligibility for the free and reduced price lunch program, and grade level.
- **Making CS Count:** In New Jersey, computer science can count as a mathematics credit for graduation.

New Mexico

- **State Plan:** The New Mexico Public Education Department developed a state strategic plan for K–12 computer science in 2021.
- **K-12 CS Standards:** New Mexico adopted the CSTA K–12 Computer Science Standards in 2018. Standards within each grade band address concepts of equity, such as bias, accessible technology, and inclusivity.
- **Funding:** The NM Public Education Department used funds from HB 2 (FY 2022) to offer $500K in competitive grants for K–8 computer science, including teacher professional development. HB1 (first special session, FY 2021) amended the FY 2021 budget to allocate $300K for K–8 computer science, including $166K from recurring funding and $133.9K from the STEAM initiative. HB 548 (FY 2020) allocated $200K annually to develop and implement teacher professional development courses. The application guidance includes professional development activities that are culturally and linguistically responsive, and awards prioritized high-need districts.
- **K-12 CS Certification:** In New Mexico, teachers with existing licensure in secondary education can obtain a computer science endorsement through one of six pathways: completing academic coursework, passing a licensure exam, work experience, professional development, industry certification, or subject-specific teaching experience.
- **Dedicated CS Position:** The New Mexico Public Education Department has a K–8 Computer Science Specialist and an Education Administrator in the Office of College and Career Readiness focused on high school computer science.
- **Making CS Count:** In New Mexico, computer science can count as a mathematics or science credit for graduation, provided that a student has demonstrated competence in mathematics or science.

Nevada

- **State Plan:** The Nevada Department of Education developed the Computer Science Strategic Plan in 2018. The plan includes a section dedicated to diversity and strategies to build toward more equitable outcomes.
- **K-12 CS Standards:** Nevada adopted K–12 computer science standards in 2018. Standards within each grade band address concepts of equity, such as bias, accessible technology, and inclusivity.
- **Funding:** SB 313 (FY 2020 and 2021) allocated $700K and $933K, and SB 200 (FY 2018 and 2019) allocated $1M and $1.4M to expand computer science education.
- **K-12 CS Certification:** In Nevada, teachers with existing licensure can obtain a secondary endorsement in advanced computer science through academic coursework or passing the Praxis CS exam. Teachers can also obtain a K–12 Introductory Computer Science endorsement through academic coursework. Funding is available to offset the cost of certification.
- **Preservice Incentives:** SB 313 (2019) required training all preservice teachers in computer science and computer literacy. The bill also allowed the Nevada Board of Regents to apply for a grant from the computer science education fund to develop curriculum and standards for preservice computer science educators.
- **Dedicated CS Position:** The Nevada Department of Education has a Computer Science Education Programs Professional.
- **Requiring All Secondary Schools to Offer CS:** SB 200 (2018) required all high schools to make a computer science course available to all students by July 1, 2022, and required all students to receive instruction in computer education before 6th grade. Schools must make

efforts to increase enrollment of female students, students with disabilities, and students from underrepresented racial and ethnic groups. The state publishes a biennial report which includes enrollment demographics on gender, race, and students with disabilities.

- **Making CS Count:** In Nevada, all students must earn one half-credit in computer education and technology for graduation with at least half of the instructional time dedicated to computer science and computational thinking. A student may take this half-credit in middle school but the course must include the high school standards in order to satisfy this graduation requirement. Students may count a full-year credit computer science course towards their fourth-year math or third-year science credit graduation requirement. Allowable courses include AP, CTE, or courses offered by a community college or university.
- **Higher Education Admission:** A computer science course can count as a mathematics or science credit required for admission at institutions of higher education, which aligns with Nevada's high school graduation policy.

New York

- **K-12 CS Standards:** The New York State Board of Regents approved the K–12 Learning Standards for Computer Science and Digital Literacy in December 2020. The introduction to the standards describes how to address digital equity, English language learners, and students with disabilities, and standards within each grade band address concepts of equity, such as bias, accessible technology, and inclusivity.
- **Funding:** A 3003/S 2503 (FY 2022), A 9503/S 7503 (FY 2021), A 2003/S 1503 (FY 2020), and S 7504/A 9504 (FY 2019) allocated $6M annually (for an eventual total of $30M) to expand computer science education via the Smart Start program. The grantees should incorporate strategies for increasing participation in computer science by traditionally underrepresented groups, such as female students, students with differing abilities, English language learners/Multilingual learners, and/or Black/African American, Hispanic/Latino/Latina, or Native American/Alaskan students.
- **K-12 CS Certification:** In New York, teachers with or without existing licensure can obtain a 7–12 certification by completing one of the following: approved state teacher preparation program pathway, academic coursework, or industry experience and pedagogical coursework. Any licensed teacher who teaches computer science before September 2022 will be eligible to continue teaching computer science in the same district for ten years.
- **Preservice Incentives:** The New York State Education Department has approved teacher preparation programs leading to certification in computer science and lists these programs publicly.
- **Making CS Count:** New York passed a permissive and encouraging policy to allow computer science to count as either a mathematics or science credit for graduation, but it is a district decision.

Ohio

- **State Plan:** The Ohio Department of Education and Department of Higher Education are in the process of developing a state plan for K–12 computer science.
- **K-12 CS Standards:** Ohio adopted K–12 computer science standards and a model curriculum in 2018. Standards within each grade band address concepts of equity, such as bias, accessible technology, and inclusivity. These standards will be updated by September 2022, as required by HB 110 (2021).

- **Funding:** Although Ohio does not currently provide dedicated state funding, HB 166 (FY 2020) appropriated $1.5M for teachers to become credentialed in computer science. Awards prioritized educators assigned to schools with greater than 50% of students classified as economically disadvantaged.
- **K-12 CS Certification:** In Ohio, teachers with existing licensure can obtain a K–12 supplemental teaching license through passing the state content exam; teachers can also earn an initial license in computer science. Temporary revisions to teaching requirements allow licensed 7–12 teachers who completed approved professional development to teach computer science until 2023. The state provided dedicated funding in FY 2020–2021 to offset the cost of computer science certification.
- **Preservice Incentives:** The Ohio Department of Higher Education has approved teacher preparation programs leading to certification in computer science and lists these programs publicly. HB 110 (2021) required each educator preparation program and each educator licensure candidate to receive instruction in computer science and computational thinking.
- **Dedicated CS Position:** The Ohio Department of Education has a Computer Science Education Program Specialist.
- **Making CS Count:** In Ohio, a computer science course that addresses high school mathematics standards and focuses on algorithms for problem-solving can count as a mathematics credit for graduation. One credit of advanced computer science can also satisfy the requirement for one unit of algebra 2/math 3 or equivalent or one unit of advanced science (excluding biology or life sciences), and a coding course can satisfy foreign (world) language credit in schools that require it for graduation.
- **Higher Education Admission:** An advanced computer science course can count towards the mathematics, science, or elective admission requirements, and a unit of computer coding can count towards foreign language requirements at state universities if the student applied the course towards their high school graduation requirements.

Oklahoma

- **State Plan:** CSforOK developed a strategic plan for expanding computer science education in 2020. The plan includes a section on equity and will monitor outcomes including increasing participation by female students, Black students, and Hispanic/Latino/Latina students.
- **K-12 CS Standards:** Oklahoma adopted K–12 computer science standards in 2018. Standards within each grade band address concepts of equity, such as bias, accessible technology, and inclusivity.
- **Funding:** Although SB 593 (2019) authorized the Oklahoma State Department of Education to create a grant program for computer science professional learning and recommended $1M subject to authorization, no funds were appropriated for the program.
- **K-12 CS Certification:** In Oklahoma, teachers with existing licensure can obtain a 9–12 certification through passing the state content exam; teachers can also earn an initial license in computer science.
- **Preservice Incentives:** Oklahoma has competencies for licensure and certification in computer science, but no universities currently meet them.
- **Dedicated CS Position:** The Oklahoma State Department of Education has a Director of Education Technology and Computer Science Education, and will soon hire a full-time Director of Computer Science Education.

- **Requiring All Secondary Schools to Offer CS:** SB 252 (2021) required all schools (elementary, middle, and high) to offer computer science by the 2024–2025 school year. Further, SB 593 (2019) directed the State Department of Education to develop a rubric for computer science programs in elementary, middle, and high schools to serve as a guide to schools for implementing quality computer science programs.
- **Making CS Count:** In Oklahoma, an approved computer science course can count as a mathematics or computer technology/world language credit in the Core Diploma Pathway.
- **Higher Education Admission:** Two computer science credits can count towards the additional required units in required content areas for admissions at institutions of higher education, which aligns with Oklahoma's high school graduation policy.

Oregon

- **State Plan:** The Oregon Governor sent a letter to the Oregon Department of Education and Higher Education Coordinating Commission to begin the development of a statewide implementation plan for computer science education.
- **Funding:** Although Oregon does not yet provide dedicated state funding towards professional development for computer science, the governor announced the use of $5M in federal funds (Governor's Emergency Education Relief) to ensure students across Oregon have access to computer science by the 2027-28 school year.
- **Making CS Count:** Oregon passed a permissive and encouraging policy to allow computer science to count as a fourth science elective for graduation, but it is a district decision.

Pennsylvania

- **K-12 CS Standards:** Pennsylvania endorsed the CSTA K–12 Computer Science Standards in 2018. Standards within each grade band address concepts of equity, such as bias, accessible technology, and inclusivity.
- **Funding:** Pennsylvania budgets (Act 1A for FY 2019, FY 2020, the FY 2021 interim budget, and FY 2022) each dedicated $20M annually to PAsmart, a program established to expand STEM and computer science education, including teacher professional development. PAsmart grants prioritize proposals that boost participation in computer science education for historically underserved and underrepresented populations.
- **K-12 CS Certification:** In Pennsylvania, teachers with existing licensure can obtain a 9–12 certification through passing the state content exam; teachers can also earn an initial license in computer science.
- **Preservice Incentives:** The Pennsylvania Department of Education developed specific program guidelines for state approval of professional educator programs in computer science and lists these programs publicly.
- **Dedicated CS Position:** The Pennsylvania Department of Education has a Consultant to the Secretary of Education on STEM/Computer Science.
- **Making CS Count:** In Pennsylvania, any computer science course aligned with the computer science standards can count as a mathematics or science credit for graduation.

Rhode Island

- **State Plan:** CS4RI (a partnership between the Governor’s office and the Rhode Island Department of Education) created a state plan for computer science education

implementation. One of the goals of the plan is to broaden participation among populations that are underrepresented in computer science.

- **K-12 CS Standards:** Rhode Island adopted K–12 computer science standards in 2018. Standards within each grade band address concepts of equity, such as bias, accessible technology, and inclusivity. Additionally, standards can be met without computing devices or with limited hardware access, making implementation possible for all schools.
- **Funding:** H 5151A (FY 2020), H 7200A (FY 2019), H 5175 (FY 2018), and H 7454 (FY 2017) allocated $210K annually for computer science professional development. Grants focus on broadening participation, and priority is given to Title I-eligible schools. The Department received a $2.5M federal grant to support the creation of high school computer science pathways that incorporate work-based learning.
- **K-12 CS Certification:** In Rhode Island, teachers with existing licensure can obtain an endorsement through academic coursework from an approved provider.
- **Preservice Incentives:** The Rhode Island Department of Education has approved teacher preparation programs leading to the endorsement in computer science and lists those programs publicly.
- **Dedicated CS Position:** The Rhode Island Department of Education has a core team advancing the goals of CS4RI, including the Digital Learning Specialist, CS4RI High School Grant Project Manager, and CS4RI Work-Based Learning Specialist.
- **Requiring All Secondary Schools to Offer CS:** Rhode Island does not yet require that all secondary schools offer computer science. However, the CS4RI initiative and the Governor’s office set a goal for all students to have access to computer science courses by the end of 2017.
- **Making CS Count:** In Rhode Island, computer science can count as a mathematics or science credit for graduation.

South Carolina

- **K-12 CS Standards:** South Carolina adopted K–8 computer science and digital literacy standards in 2017 and high school standards in 2018. Standards address concepts of equity, such as bias, accessible technology, and inclusivity.
- **Funding:** H 4100 (FY 2022) allocated $1.768M to teacher professional development, certification, and regional computer science specialists. H 4000 (FY 2020) allocated $500K to teacher professional development; that funding continued in FY 2021 through a continuing resolution. H 3720 (FY 2018) allocated $400K to the Department of Education to implement the Computer Science Task Force's recommendations.
- **K-12 CS Certification:** In South Carolina, teachers with or without existing licensure can obtain 9–12 certification by completing an approved preparation program and passing the state content exam. The state provided dedicated funding in FY 2022 to offset the cost of computer science certification.
- **Preservice Incentives:** There are program approval standards (CS teacher standards) but no universities currently meet them.
- **Dedicated CS Position:** The South Carolina Department of Education has a Computer Science Specialist.
- **Requiring All Secondary Schools to Offer CS:** The South Carolina Department of Education revised the list of courses that satisfy the computer science graduation requirement, effectively requiring all high schools to offer at least one computer science

course by the 2018–2019 school year (with waivers available until the 2020–2021 school year) and requiring all students to take at least one credit of computer science to graduate.
- **Making CS Count:** In South Carolina, all students must take one credit of computer science to graduate. Multiple computer science courses are approved to meet the credit.
- **Higher Education Admission:** Computer science can count as the fourth mathematics credit required for admission at institutions of higher education. Further, students are strongly encouraged to take computer science as a high school elective.

South Dakota

- **K-12 CS Certification:** In South Dakota, teachers with existing licensure can obtain a K–6 or 7–12 endorsement through academic coursework or passing the Praxis CS exam.
- **Making CS Count:** In South Dakota, a state-approved advanced computer science course can count as a science credit for students who earn a regular diploma.

Tennessee

- **State Plan:** The Tennessee Department of Education presented the Tennessee Computer Science State Education Plan to the legislature in April 2020 and posted a timeline for each recommendation on the department website.
- **K-12 CS Standards:** Tennessee published a comprehensive set of K–12 computer science standards in July 2020.
- **Funding:** HB 2153 (FY 2023-24) includes $1,266,300 for computer science education, including professional development and the implementation of a graduation requirement in computer science. This funding will continue in future years. PC 651 (FY 2021) includes $518K for computer science education, including professional development, within the Governor's Future Workforce Initiative.
- **K-12 CS Certification:** In Tennessee, teachers with existing licensure can obtain the Computer Science Employment Standard endorsement after completing approved professional development. An initial license in computer science requires completing academic coursework and passing the Praxis CS exam. In 2022, the legislature passed a bill requiring approval of a new endorsement in computer science.
- **Preservice Incentives:** The Tennessee Department of Education has approved teacher preparation programs leading to certification in computer science and lists these programs publicly.
- **Dedicated CS Position:** The Tennessee Department of Education has a Director of STEAM and Computer Science.
- **Requiring All Secondary Schools to Offer CS:** HB 2153 (2022) requires that by the 2024-2025 school year, high school students receive one full school year of computer science education to satisfy graduation requirements, middle school students receive one course in computer science education, and elementary school students receive grade-appropriate computer science education.
- **Making CS Count:** In Tennessee, all high school students must receive one full school year of computer science education to satisfy graduation requirements. Previously, computer science could count as a mathematics credit for graduation.

Texas

- **State Plan:** Although HB 2984 (2019) required the development of a state plan for computer science, Texas has not made progress towards a state plan.
- **K-12 CS Standards:** Texas adopted the Texas Essential Knowledge and Skills (TEKS) Fundamentals of Computer Science for K-8 in June 2022 and TEKs at the high school level contain computer science standards.
- **Funding:** SB 1 (FY 2022 and 2023) allocated $2.585M to make an AP Computer Science Principles course available in every high school and HB 3 and HB 963 (2019) consolidated all computer science (or technology applications) courses into CTE and allowed schools to receive weighted funding for students enrolled in those courses in grades 7–12.
- **K-12 CS Certification:** In Texas, teachers with or without existing licensure can obtain an 8–12 certification by completing a state-approved teacher preparation program and passing certification exams.
- **Preservice Incentives:** The Texas Education Agency has approved teacher preparation programs leading to certification in computer science and lists these programs publicly.
- **Requiring All Secondary Schools to Offer CS:** The Texas State Board of Education added computer science courses to the list of required offerings at high schools (19 TAC § 74.3) in 2014.
- **Making CS Count:** In Texas, AP Computer Science A, IB Computer Science Higher Level, or discrete math can count as a required mathematics course for graduation. Computer science can also count as an advanced science credit, and multiple course options can satisfy the foreign language requirement.
- **Higher Education Admission:** Computer science can count as the fourth mathematics credit required for admission at institutions of higher education in Texas.

Utah

- **State Plan:** Utah adopted the Utah Computer Science Education Master Plan in 2019. The plan includes a section on diversity with goals and recommendations to expand access to rural, low-income, and female students. The Community Foundation of Utah and the Silicon Slopes community created the Silicon Slopes Computer Science Fund to invest in computer science education initiatives outlined in the state plan.
- **K-12 CS Standards:** Utah adopted K–5 computer science standards in September 2019 and 6–12 standards in May 2020. Standards within each grade band address concepts of equity, such as bias, accessible technology, and inclusivity.
- **Funding:** SB 2 (FY 2023) allocated $8M for Computer Science Initiatives. HB 2 (FY 2022) allocated $5M for Computer Science Initiatives. HB 227 (FY 2020) allocated $3.15M for the Computer Science for Utah Grant Program. Applicants must describe how they will increase the number of female and traditionally underserved students, ensure content is accessible to all students, and strategies for increasing diversity in K–12 computer science. SB 190 (FY 2018 and 2019) allocated $1.2M annually for the Computing Partnerships Grants program. SB 93 (FY 2017) allocated $400K for computer science.
- **K-12 CS Certification:** In Utah, teachers with existing secondary or CTE licensure can obtain up to six course-specific 6–12 endorsements. Each endorsement requires a combination of experience or coursework, exams, professional development, and more.
- **Preservice Incentives:** The Utah State Board of Education has approved teacher preparation programs leading to certification in computer science and lists these programs publicly.

- **Dedicated CS Position:** The Utah State Board of Education has a Computer Science State Specialist.
- **Making CS Count:** In Utah, a computer programming course can replace the third mathematics credit (Secondary III) by request from a parent, or it can count as a science credit. AP Computer Science, Computer Science Principles, and Computer Programming II are approved to count as a science graduation credit. All students must take a course in Digital Studies, and four of the six courses that can fulfill the requirement are computer science.

Virginia

- **K-12 CS Standards:** Virginia added mandatory K–12 computer science standards to the state Standards of Learning in 2017, effectively requiring all K–12 schools to offer instruction in computer science. Standards within each grade band address concepts of equity, such as bias, accessible technology, and inclusivity.
- **Funding:** HB 30 (FY 2021 and 2022) allocated $1.35M annually to support computer science education and implementation of the standards, including professional development. HB 30 (FY 2021 and 2022), HB 1700 (FY 2019 and 2020), and HB 1500 (FY 2017 and 2018) also allocated $550K annually for K–12 computer science professional development with CodeVA.
- **K-12 CS Certification:** In Virginia, teachers with existing licensure can obtain an endorsement through academic coursework or passing the Praxis CS exam. An initial license in computer science requires completing a state-approved program or academic coursework. The Department of Education convened a workgroup on micro-credentials for certification in subjects including computer science and is now developing recommendations as authorized by HB 836 (2020).
- **Preservice Incentives:** The Virginia Department of Education has approved teacher preparation programs leading to certification in computer science and lists these programs publicly.
- **Dedicated CS Position:** The Virginia Department of Education has a Computer Science Coordinator.
- **Requiring All Secondary Schools to Offer CS:** HB 831 (2016) added computer science into the Virginia K–12 Standards of Learning, which all schools must implement.
- **Making CS Count:** In Virginia, a variety of computer science courses can count as a credit for graduation in lab science, career and technical education, or mathematics at or above the level of Algebra II. Students in English as a Second Language programs can add a computer science elective for graduation credit if they test out of their foreign language requirement.

Vermont

- **K-12 CS Certification:** In Vermont, teachers with existing licensure can obtain a 7–12 endorsement by demonstrating knowledge standards, performance standards, and completing academic coursework.
- **Preservice Incentives:** The Vermont Agency of Education has approved teacher preparation programs leading to certification in computer science and lists these programs publicly.

- **Dedicated CS Position:** Although the Vermont Agency of Education does not have a position dedicated to computer science education, the Education Technology Coordinator oversees computer science education.
- **Making CS Count:** Vermont passed a permissive and encouraging policy to allow computer science to count towards a core graduation requirement at the district level.

Washington

- **State Plan:** The Washington State Office of Superintendent of Public Instruction adopted a plan for K–12 computer science education in 2022. The plan includes a section on diversity, equity, and inclusion.
- **K-12 CS Standards:** Washington adopted updated K–12 computer science standards based on the CSTA standards in 2018. Standards within each grade band address concepts of equity, such as bias, accessible technology, and inclusivity.
- **Funding:** SB 5092 (FY 2022 and 2023), HB 1109 (FY 2020 and 2021), SB 5883 (FY 2018 and 2019), and SB 6052 (FY 2016 and 2017) appropriated $1M annually for the computer science education grant program with a one-to-one private match requirement. HB 1109 exempted the match requirement for districts with greater than 50% of students eligible for free and reduced-price meals. Grants are intended to support innovative ways to engage students from historically underrepresented groups, including female students, low-income students, and students in underrepresented racial and ethnic groups.
- **K-12 CS Certification:** In Washington, teachers with existing licensure can obtain a K–12 endorsement through passing the state content exam. Legislation was passed in 2021 to create two new specialty endorsements in computer science and allocated $63,000 to start this process. State funding for computer science can support credentialing for teachers.
- **Preservice Incentives:** The Washington Office of Superintendent of Public Instruction has approved teacher preparation programs leading to certification in computer science. The Washington State Opportunity Scholarship also provided funding for Central Washington University and Western Washington University to develop a computer science endorsement program.
- **Dedicated CS Position:** The Washington Office of the Superintendent of Public Instruction has a Computer Science Program Specialist.
- **Requiring All Secondary Schools to Offer CS:** SB 5088 (2019) required that each school district that operates a high school must provide access to an elective computer science course by the 2022–2023 school year. HB 1577 (2019) required each school district to report the number of computer science course offerings and demographics of the students enrolled in the courses, starting in June 2020. SB 5657 (2022) requires each school district operating an institutional education program for youth in state long-term juvenile institutions to provide an opportunity to access an elective computer science course.
- **Making CS Count:** In Washington, a computer science course that aligns to the state computer science learning standards can count as the third required mathematics credit or science credit for graduation.
- **Higher Education Admission:** AP Computer Science A can count as a mathematics credit required for admission at institutions of higher education in Washington.

Wisconsin

- **K-12 CS Standards:** Wisconsin adopted K–12 computer science standards in 2017. Standards within each grade band address concepts of equity, such as bias, accessible technology, and inclusivity.
- **K-12 CS Certification:** In Wisconsin, teachers with existing licensure can obtain a 4–12 supplementary license by passing the Praxis CS exam. An initial license in computer science requires completing a state-approved preparation program.
- **Preservice Incentives:** The Wisconsin Department of Public Instruction has approved teacher preparation programs leading to certification in computer science and lists these programs publicly.
- **Dedicated CS Position:** The Wisconsin Department of Public Instruction is currently in the process of hiring a Computer Science and Digital Learning Innovation Consultant.
- **Requiring All Secondary Schools to Offer CS:** Although Wisconsin does not yet require that all secondary schools offer computer science, state statute 118.01(2)(a)5 requires each school board to provide an instructional program designed to give students knowledge in computer science, including problem-solving, computer applications, and the social impact of computers.
- **Making CS Count:** In Wisconsin, computer science courses that meet the department's definition of computer science can count as a mathematics credit for graduation.

West Virginia

- **State Plan:** The West Virginia Department of Education approved a state plan for expanding Computer Science in October 2019.
- **K-12 CS Standards:** West Virginia adopted K–12 computer science standards in 2019.
- **Funding:** With the publication of the West Virginia Computer Science Plan in October 2019, the state also allocated yearly funding for professional development for teachers as recommended by SB 267 (2019).
- **K-12 CS Certification:** In West Virginia, teachers with existing licensure can obtain course-specific authorizations for Introduction to Computer Science, Computer Science Discoveries, and/or Computer Science Fundamentals by completing specified professional development.
- **Dedicated CS Position:** The West Virginia Department of Education has a Computer Science Supervisor.
- **Requiring All Secondary Schools to Offer CS:** SB 267/HB 2415 (2019) required the West Virginia State Board of Education to adopt a policy detailing the appropriate level of computer science instruction that shall be available to students at each programmatic level prior to the 2020–2021 school year. Policy 2510, revised in 2015, required all high schools to offer a computer science course.
- **Making CS Count:** In West Virginia, an AP computer science course can count as the fourth mathematics credit or a science credit for graduation.

Wyoming

- **State Plan:** The Wyoming Department of Education created a task force in 2017 to develop and implement a long-term plan for expanding computer science.
- **K-12 CS Standards:** Wyoming adopted K–12 computer science standards in February 2020. Standards within each grade band address concepts of equity, such as bias, accessible technology, and inclusivity.

- **Funding:** Although Wyoming does not yet provide dedicated state funding, the Wyoming Trust Fund for Innovative Education prioritized computer science applications in 2018–2021.
- **K-12 CS Certification:** In Wyoming, teachers with existing licensure can obtain a K–12 endorsement by completing a program that leads to licensure or a combination of coursework and passing the Praxis CS exam. Another pathway requires coursework and work experience. Teachers can teach out of field for up to two years and can earn the CS endorsement by passing the Praxis CS exam within those two years.
- **Dedicated CS Position:** The Wyoming Department of Education has a Math and Computer Science Consultant.
- **Requiring All Secondary Schools to Offer CS:** SF 29 (2018) required all schools to include computer science and computational thinking by the 2022–2023 school year.
- **Making CS Count:** In Wyoming, computer science courses aligned with the standards can count as a science credit for graduation.
- **Higher Education Admission:** Computer science can count as one year of science, fourth year mathematics (for state scholarship), or career credits required for admission at institutions of higher education, which aligns with the high school graduation policy.

See a comparison chart of the 9 policies by state at www.bit.ly/9policies

ITC's Digital Literacy Dashboard (Computing Alliance)

K-12

Pipeline		Idaho Competitiveness	Growth Opportunities
XXX	Qualified teachers teaching tech	Low	• Qualified teachers to teach tech • Barriers for teachers to begin teaching tech, e.g., teacher must pay for a degree. • State financial support
XX,XXX	Students participating	Improving	

Higher Ed

Pipeline		Idaho Competitiveness	Growth Opportunities
Two	Fully Accredited CS Schools	Low	Classroom space for BSU and U of A
XXX	Schools Offering Tech Education	Good	???
2xxx	Annual Graduates	Low	State HS Graduation Requirement. Bring more women into subject.
$XX,XXX	Average Cost to Graduate	Strong	State support

Overall

Vision
Nurture the talent in Idaho's Technology industry by Bringing STEM to every Idaho household, school and community to expand our thriving economy.

Trends
- Students aren't going to technology careers
- Districts have multiple priorities of which tech is just one

2-3 Year Goals
- Technology opportunity K-12 for every student statewide
- Equitable access and funding

Needs for Success
- State funding
- District buy-in
- Lower costs for educators for training / certification
- Greater teacher financial reward

Action Items

Action Items

- Prep for and join Kaitlin with Matthew
- Integrate Cory, Sherawn and Reid's ideas into the deck - main slide, sub-slides
- Review with Rob Tuft for his input
- Get input from Tracy Bent if we can
- Integrate Jay's point about Graduation Requirement
- Jet to update Dashboard with requests and changes (send me your wish lists or edit yourself)

Katie’s (SAC) 3 plans given priorities

- Plan 1 would be a total cost of: $1.325 mil (Professional Development, 6 CS Specialists, Materials,
- Plan 2 would be a total cost of: $1.185 mil
- Plan 3 would be a total cost of: $760k

Nothing new that we don't already know.
Curious about what needle will this move?

https://docs.google.com/presentation/d/19J3ziayheu44YO8_TRJ5C85mSp029fbx/edit#slide=id.p1

We will move to CS as a grad requirement.
Entry level pay isn't what is expected.

St. Luke's can hire right out of HS – this summer, hire interns – will learn more on the job, versus coming in after courses (this is a hypothesis) go right to a career field; lower cost of labor, hire on interest/aptitude/ability
After they graduate will offer a job.

Talk about tech classes – cs classes – number offered, number taken

Talking tool. These are pertinent items for ITC to be thinking about. Will help others percolate on the information and then continue thinking forward. Create a cadence around what we are seeing – to keep asking what can we continue to do to improve.

What are your thoughts on what we're seeing?
What do you need to be successful? What conversations need to take place?

Awareness for parents. What will this do for my student?
Student. What is the value? Show me the potential.

Show the partnership between Higher Ed and K -12 – include the pre-service teachers.

Stakeholders: Education, Higher Ed, Industry, Parents, Students, Teachers

New Slide:
Education – 9 points

What is industry response to the pipeline?

Not just a long-term vision, systematic change. Looking toward the future. Building a base knowledge for the student's future.

Arkansas:
A student must have CS, 1 year, can be in math, science or elective

Industry Help:
Teaching in districts (InTimeTech)

Action items:
Next steps for meeting with Gov Office
Prep for and join Kaitlin with Matthew
Integrate Cory, Sherawn and Reid's ideas into the deck - main slide, sub-slides
Review with Rob Tuft for his input
Get input from Tracie Bent
Graduation Requirement

3 Main Items: professional development, infrastructure, and devices
Plan 1 would be a total cost of: 1.325 mill
Plan 2 would be a total cost of: 1.185 mill
Plan 3 would be a total cost of: 760k

Vision - *DRAFT*

Challenges

ITC

- Most members are not experts in tech education trends but need employees with technology education
- Often Jay, Sherawn, and Reid have to catch up members on key topics from the last board meetings
- Industry wants to help but aren't always aligned to what would be most impactful to help.

Idaho

- We have a limited number of teachers who are in a position to teach CS related courses.

Opportunity

- Act as an aligning and progress tool for Industry to assess how we can contribute more and if our contributions are helping.
- Act as an aligning tool between Idaho Government & Education and Industry.
- Use to brainstorm new, impactful steps industry can take.
- Use data from Idaho State and Districts to add a quantitative aspect to it, thereby fostering further alignment.

And explore if Government or Education would find value in elements of this tool (if not already integrated into their KPIs for tech education)

Notes

- “Computational Thinking” for K-8 learning

This white paper is a companion to the "Idaho K-12 Computer Science Standards." It provides motivation and rationale for the standards and describes their development process. This document also adds transparency for the standards development process by providing historical reference and rationale for the content of the standards. It is intended to provide context for the standards.

What is Computer Science?

Computer Science is an established discipline at the collegiate level. The foundational concepts of Computer Science permeates all work and play in the digital world that we live in.

"What would we like our children- the general public of the future—to learn about computer science in schools? We need to do away with the myth that computer science is about computers. Computer science is no more about computers than astronomy is about telescopes, biology is about microscopes or chemistry is about beakers and test tubes. Science is not about tools, it is about how we use them and what we find out when we do" [2]. Engineering deals precisely with the notion of "how to." Science and Mathematics deal precisely with the notion of "what is." Computer Science deals with both aspects of computation and information. While Computer Science can be defined in various ways, the following definition is the one the working group has chosen to use.

"Computer science is the scientific and engineering approach to computation, as well as its applications and impact. It is the systematic study of the feasibility, structure, expression, and mechanization of the methodical procedures (or algorithms) that underlie the acquisition, representation, processing, storage, communication of, and access to information" [1].

Computer Science broadly encompasses data, algorithms, programming languages, and computational systems. Some of the major subspecialties of computer science are algorithms and

data structures, programming methodology, programming language design and implementation, software engineering, computer architecture, operating systems, database systems, networks and communications, parallel computing, distributed systems, human-computer interaction, artificial intelligence, secure and dependable systems, theory of computation, and computer graphics.

The Idaho K-12 Computer Science standards are organized by grade bands (K-2, 3-5, K-5, 6-8, 9-10, 11-12 and 9-12) and the five Core Computer Science Concepts shown below. It is intentional that some of the grade bands overlap. The standards are tagged with the seven Computational Thinking Framework practices shown below to match the practices to the concepts. The concepts and practices are borrowed from the 2016 K-12 CS Framework at k12cs.org [3]. Also included is a column for the designation of ISTE (International Society for Technology Education) Standards [5] as they align with the content standards for Computer Science.

The 5 Core Computer Science concepts:

1. Devices
2. Networks and Communication
3. Data and Analysis
4. Algorithms and Programming
5. Impact of Computing

The 7 Computational Thinking practices:

1. Recognizing and Representing Computational Problems
2. Developing and using Abstractions
3. Creating Computational Artifacts
4. Testing and Iteratively Refining
5. Fostering an Inclusive Computing Culture
6. Communicating about Computing
7. Collaborating around Computing

International Society for Technology Education (ISTE) Standards:

1. Creativity and Innovation
2. Communication and Collaboration
3. Research and Information Fluency
4. Critical Thinking, Problem Solving, and Decision Making
5. Digital Citizenship
6. Technology Operations and Concepts

The Purpose of the Standards

Computer Science is a field of study that will help to prepare students to meet future college and career goals. There are many jobs that require the understanding of Computer Science concepts and skills, however, all Idahoans can benefit from the computational thinking that is incorporated into these standards. The development of the Computer Science standards will move the students from

being consumers of technology to being able to understand and create new technologies of the future.

The standards prioritize, clarify, and build upon frameworks developed by professional organizations, educators, and industry. It is not an exhaustive list of everything in Computer Science that can be learned within a K-12 pathway, but instead describes what it means to be *literate* in Computer Science.

The standards are not curriculum. Curriculum is determined by the LEA (Local Education Agency). The standards clarify the learning outcomes of students. The standards inform teachers of what students should know, understand, or be able to do. Teachers can create "I can" statements with student friendly language from the standards. These are the minimum standards for Computer Science education. The LEA may include additional standards when writing curriculum depending on course offerings and the needs of students. Educators can use the standards in a variety of creative ways.

Current Status of Computer Science in Idaho

Idaho's current state of Computer Science education in K-12 is unstructured, disjointed, and uneven. As a result of not having a cohesive set of Idaho Computer Science Standards, teachers grasp from various resources and standards, which may not align across the state. This causes a lack of parity and equality for Idaho's students, as well as their access to Computer Science education. Having a uniform set of Computer Science standards will provide continuity of K-12 Computer Science education offerings throughout the state. Benefits will continue through higher education, and ultimately industry, business, and commerce of Idaho as more competent and well-educated graduates fulfill positions throughout the state.

According to the Conference Board (used by the Idaho Department of Labor), there are currently around 1300 unfilled open jobs in the state of Idaho for computer science related professions, many of which can be attributed to a lack of qualified candidates [6]. Not only is this challenging for potential employers, but also affects our state revenues in potential taxes with salaries averaging around $70,000. For the benefit of our citizens, students' education, as well as the future of computer science and the technology industry in our state, creating these standards is an important step.

The Standards Creation Process

The standards were built on a progression of skills that can be accomplished using a variety of tools and in some cases limited access to computers and the internet. Several existing Computer Science and related standards from CSTA (Computer Science Teachers Association), ISTE (International Society for Technology in Education), Florida Department of Education, Idaho CTE Programming Standards, Teacher Preparation Standards for Initial Certification in Computer Science, and Idaho Core Standards were reviewed and considered.

The working group chose the CSTA 2016 Computer Science draft standards [4], which aligns with the new K-12 CS Framework. The K-12 CS Framework draft is steered by 5 organizations: ACM (Association for Computing Machinery), CIC (Cyber Innovation Center), Code.org, CSTA, and NMSI (National Math+Science Initiative). The K-12 CS framework provides overarching, high-level guidance per grade bands, while the standards provide detailed student performance expectations at particular grade levels. The framework was considered as an input for the standards development process.

The CSTA draft standards were chosen for the following reasons:

- The working group felt that the CSTA draft standards, based on the K-12 CS Framework, were the best match for Idaho.
- They were the most up to date standards with input from a variety of educators, industry, and professional organizations.
- The CSTA standards (and the K-12 CS Framework) had input from various relevant organizations and industry:
  - Several states (MD, CA, IN, IA, AR, UT, ID, NE, GA, WA, NC)
  - Large school districts (NYC, Chicago, San Francisco)
  - Technology companies (Microsoft, Google, Apple)
  - Organizations (Code.org, ACM, CSTA, ISTE, MassCAN, CSNYC), and individuals (higher ed faculty, researchers, K-12 teachers, and administrators)
  - There was Idaho representation within the CSTA group

The working group evaluated and adapted the 2016 draft of the CSTA K-12 CS Standards with consideration of the following:

- Is the standard appropriate for Idaho?
- Is the standard appropriate for the given grade level?
- Is the standard measureable?
- Are there areas that we want to add that are not covered in the standards?
- Does the standard need an example for clarification?
- What needs to be removed, rewritten, or repositioned?
- Do the standards parallel what occurs in disciplines such as science, mathematics, and language arts?

The working group customized the CTA standards for Idaho using the above questions as a guide. This was done over four days of intense face to face discussion as well as offline email exchanges. The working group made several improvements and changes in the draft CSTA standards. These modification were also submitted back to the CSTA for incorporation into the national standards.

Once the draft of the proposed standards was ready, a survey was sent to individuals in industry, elementary, secondary and postsecondary educators, and other interested parties to solicit input. The

working group received over fifty surveys. The working group assessed and modified the standards based on the feedback.

Supporting Resources and References

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2. Michael R. Fellows, Ian Parberry. "SIGACT trying to get children excited about CS." Computing Research News. January 1993.
3. A Framework for K-12 Computer Science Education, https://k12cs.org.
4. CSTA K-12 CS Standards (Draft, 2016)
5. ISTE Standards, http://www.iste.org/standards/iste-standards.
6. Software occupations in demand (Idaho Department of Labor) https://labor.idaho.gov/publications/software-occupations-in-demand.pdf

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High School Graduation Minimum Requirements

This document outlines the minimum graduation requirements as outlined in IDAPA 08.02.03 104, 105, 106. School districts may have additional local requirements that impact student graduation.

By the end of the 8th grade, each student shall develop a parent-approved career pathway plan for their high school and post-high school options. It must be reviewed annually and may be revised at any time.

CONTENT AREA	STATE MINIMUM CREDIT REQUIREMENTS
Core Subject Areas	**29 credits**
Electives	**17 credits**
Additional Requirements	**See Descriptions**
Total Credits	**46 credit (minimum)**

Core Subject Areas	Credit Numbers
Language Arts • Language Arts – 8 Credits • Communications – 1 Credit	**9 credits** Language Arts shall consist of language study, composition, and literature and be aligned to the Idaho Content Standards for the appropriate grade level. Communications must consist of oral communication and technological application, a course in debate, or a sequence of instruction activities that meet Idaho Speech Content Standards.
Mathematics • Algebra I (equivalent) – 2 credits • Geometry (equivalent) – 2 credits • Student Choice – 2 credits	**6 credits** Secondary mathematics includes Integrated Mathematics, Applied Mathematics, Business Mathematics, Algebra, Geometry, Trigonometry, Fundamentals of Calculus, Probability and Statistics, Discrete Mathematics, and courses in mathematical problem solving and quantitative reasoning including mathematics taken through career technical education programs. Dual credit engineering and computer science courses aligned to the state standards for grades nine (9) through (12), including AP Computer Science and dual credit computer Science courses may also be counted as a mathematics credit. Students who choose to take computer science and dual credit engineering courses may not concurrently count such courses as both a mathematics and science credit for the same course.

Core Subject Areas	Credit Numbers
Science • Lab-based – 2 credits • Student Choice – 4 credits	**6 credits** Instruction in the following: earth and space sciences, life sciences, computer science, biology, computer science, chemistry environment, or approved applied sciences.
Social Studies • US History – 2 credits • Government – 2 credits • Economics – 1 credit	**5 credits** Courses such as geography, sociology, psychology and world history may not count towards this requirement.
Humanities • Student Choice – 2 credits	**2 credits** May include visual arts, music, theatre, dance, or world language aligned to Idaho content standards for those subjects. Other courses such as literature, history, philosophy, architecture, or comparative world religions may satisfy the humanities stands if the course is aligned to the Interdisciplinary Humanities Content Standards.
Health • Student Choice – 1 credit	**1 credit** Course must be aligned to Idaho Content Standards and a student should receive a minimum of one (1) class period on psychomotor cardiopulmonary resuscitation (CPR) training as outlined in the American heart Association (AHA) Guidelines for CPR to include the proper utilization of an automatic external defibrillator (AED) as part of the Health/Wellness course.
ELECTIVES	**17 CREDITS**

ADDITIONAL REQUIREMENTS	DESCRIPTION
District Requirements	The local school district or LEA may establish graduation requirements beyond the state minimum.
Advanced Opportunities	Districts must offer at least one Advanced Opportunity such as Dual Credit, Advanced Placement, Technical Competency Credit, or International Baccalaureate. Advanced Opportunities
Senior Project	The senior project is a culminating project to show a student's ability to analyze, synthesize, and evaluate information and communicate that knowledge and understanding. A student must complete a senior project by the end of grade twelve (12). Senior projects may be multi-year projects, group or individual projects, or approved pre-internship or school to work internship programs, at the discretion of the school district or charter school. The project must include elements of research, development of a thesis using experiential learning or integrated project based learning experiences and presentation of the project outcome. Additional requirements for a senior project are at the discretion of the local school district or LEA. Completion of a postsecondary certificate or degree at the time of high school graduation or an approved pre-internship or internship program may be used to meet this requirement
Civics Test	All secondary students must demonstrate that they have met the state civics and government standard by the successfully completing the civics test or alternate path. Successful completion of this requirement must be reflected on the student's transcript.
Physical Education	High schools are required to provide instructional offerings in Physical Education (fitness). Physical Education Content Standards.
Middle School Credits	Students must meet 8th grade math standards before being permitted to 9th grade. A student will have met the high school content and credit requirement for any required high school course if: The student completes such course with a grade C or higher before entering 9th grade; course meets the same content standards that are required for high school and course is taught by a properly certified teacher. Parents of middle school students taking a course for high school credit must be notified that the course is available for high school credit and must be given the option as to whether or not the course is transcribed. Students/families paying for courses with Advanced Opportunities funds are consenting to the course being transcribed as high school credit.

SUBJECT

Educator Preparation Program (EPP) Performance Measures Report (FY23)

REFERENCE

October 2016	Board was updated on progress made toward developing educator preparation program effectiveness/performance measures.
December 2016	Board approved the proposed measures for determining Educator Preparation Provider program effectiveness.
December 2018	Board accepted the pilot report on the approved measures and set the regular December 2019 Board meeting as the deadline for the full report.
February 2022	Board accepted the annual performance measure report and directed staff to bring back recommendations for new performance measures that were more meaningful.

APPLICABLE STATUTE, RULE, OR POLICY

Higher Education Act of 1965, §§207 (2008)
Idaho Code § 33-1207A

BACKGROUND/DISCUSSION

Annually, the Office of the State Board of Education (OSBE) certifies and submits Idaho's Title II report to the U.S. Department of Education (USDOE). The report includes data from public and private educator preparation programs (EPPs) authorized by the State Board of Education (the Board) to prepare individuals for certification in Idaho. On October 16, 2016 the USDOE released the revised Title II requirements. The rule imposed new reporting measures—beyond the basics required for annual reports under the Higher Education Act—which identified levels of program effectiveness to drive continuous improvement.

These federal regulations are intended to promote transparency about the effectiveness of all EPPs (traditional, alternative routes, and distance) by requiring states to report annually—at the program level—whether individual programs are effective, at risk, or low performing. These reporting requirements are aligned with the Board's interest in being able to report out on the effectiveness of those programs approved by the Board.

In December 2016, the Board approved the proposed performance measures designed by ICEP and IACTE, and recommended by the Professional Standards Commission (PSC). At the time of approval in December 2016, the implementation plan was for preliminary, or baseline data to be collected and reported to the Board in December 2018 and full reporting to the Board starting in December 2019.

In December 2018, a pilot report with incomplete preliminary data from four EPPs was presented to the Board. This pilot identified data collection obstacles and discussed the intention of convening a "consultation group" to make final recommendations for implementing the performance measures. Although the Board voted to accept the preliminary report and keep the December 2019 deadline for full reporting, several complications (including OSBE staff turnover and the later COVID-19 pandemic) delayed this work and prevented it from being completed as planned.

Work on the performance measures was resumed as OSBE returned to full staffing in the summer of 2021. With the first full report two years overdue, the process was expedited—relying on the most recent draft of the implementation plan to develop a baseline report for all currently-approved EPPs. This report was presented at the February 2021 Regular Board meeting

Significant issues with the performance measures were revealed in the process of preparing this year's report. These include a lack of data uniformity among EPPs, substantial unavailable/missing data, concerns about the validity of certain measures, and major changes to relevant standards and statute since the original development and adoption of the rubric. Due to additional staff turnover that timeline was not met. Board staff is currently working with stakeholders to bring back recommendations for new performance measures no later than the April 2023 Board meeting.

IMPACT

Educator preparation program performance measures promote transparency around the effectiveness of public educator preparation providers. Once fully implemented, such measures allow the Board to identify and incentivize excellent preparation programs as necessary, particularly in light of Idaho's teacher pipeline challenges and disparate program review standards.

ATTACHMENTS

Attachment 1 – FY23 EPP Performance Report

STAFF COMMENTS AND RECOMMENDATIONS

Since the adoption of the EPP Performance Measures used in this report, Idaho Code § 33-1207A has been amended in a way that directly impacts program reviews. Specifically, reviews of nonpublic EPPs are now limited in scope to only focusing on the knowledge (or equivalent) standards set forth in the initial standards for teacher certification. This has created a scenario where reviews of public and nonpublic programs are no longer uniform—and where some programs will lack data relevant to the EPP Performance Measures as currently written.

Board staff have received considerable pushback from some of the approved educator preparation programs on necessity of establishing performance measures and reporting out on the performance of individual programs beyond the

7-year accreditation cycle, particularly since not all programs have the same accreditation requirements. Staff has explained the annual requirement in the Title II reporting and the importance of being able to measure and report out on the effectiveness of Idaho's individual programs, especially as more new and non-traditional approaches are used for certifying Idaho teachers. Being able to compare the effectiveness of different programs will help the Board in evaluating new programs and making policy decisions on retaining or limiting programs that are less effective.

BOARD ACTION

I move to adopt the educator preparation program performance report as provided in Attachment 1.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

AND

I move to direct Board staff to revise the educator preparation program performance measures and bring back recommendations for new measures no later than the April 2023 Regular Board meeting.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

ATTACHMENT 1

FY23 Educator Preparation Program (EPP) Performance Measures

A Report Utilizing Data from the 2021-2022 Academic Year and the Most Recent Program Reviews for Each EPP

These measures were adopted by the State Board of Education in December 2016 for assessing the performance of Idaho's Educator Preparation Programs (EPPs). There are four individually weighted categories, each of which are broken into subcategories with their own available point value. The EPPs receive a rating (i.e., effective, at risk, low performing) on each subcategory, which is determined by comparing relevant data to the attached scoring rubric. Finally, each EPP receives an OVERALL PROGRAM RATING based on the total sum earned out of the 100 available points.

Category 1: **Student Learning Outcomes** (15% Weighting)									
Student Growth (10 Points Available)				2021-2022 data on 1st year teachers reported by districts as part of Career Ladder requirements (% "yes" vs "no" indicating if students met educator's Measurable Student Achievement targets)					
Boise State University	**University of Idaho**	**Idaho State University**	**Lewis-Clark State College**	**College of Southern Idaho**	**BYU – Idaho**	**Northwest Nazarene University**	**College of Idaho**	**ABCTE**	**Teach for America – Idaho**
96.50% **Effective**	**96.78%** **Effective**	**97.65%** **Effective**	**96.19%** **Effective**	**88.89%** **Effective**	**98.44%** **Effective**	**95.62%** **Effective**	**93.38%** **Effective**	**96.38%** **Effective**	**91.38%** **Effective**
Teacher Evaluation Measures (5 Points Available)				2021-2022 data on 1st year teachers reporting the average # of "unsatisfactory" components on the state evaluation framework					
Boise State University	**University of Idaho**	**Idaho State University**	**Lewis-Clark State College**	**College of Southern Idaho**	**BYU – Idaho**	**Northwest Nazarene University**	**College of Idaho**	**ABCTE**	**Teach for America – Idaho**
0.01% **Effective**	**0.02%** **Effective**	**0.01%** **Effective**	**0.04%** **Effective**	**0.00%** **Effective**	**0.01%** **Effective**	**0.04%** **Effective**	**0.16%** **Effective**	**0.02%** **Effective**	**0.00%** **Effective**
Category 2: **Teacher Employment Outcomes** (8% Weighting)									

ATTACHMENT 1

Placement Rate (2 Points Available)				Data comparing completers from the 2020-2021 Title II report to Idaho public school teaching assignments in 2021-2022					
Boise State University	**University of Idaho**	**Idaho State University**	**Lewis-Clark State College**	**College of Southern Idaho**	**BYU – Idaho**	**Northwest Nazarene University**	**College of Idaho**	**ABCTE**	**Teach for America – Idaho**
63.59% **Effective**	**43.48%** **At Risk**	**78.95%** **Effective**	**57.41%** **At Risk**	**100.00%** **Effective**	**31.73%** **Low Performing**	**68.00%** **Effective**	**100%** **Effective**	**81.98%** **Effective**	**100%** **Effective**
High Need Placement Rate (2 Points Available)				Data comparing completers from the 2020-2021 Title II report to 2021-2022 Idaho teaching assignments in federally designated Teacher Cancellation Low Income (TCLI) schools					
Boise State University	**University of Idaho**	**Idaho State University**	**Lewis-Clark State College**	**College of Southern Idaho**	**BYU – Idaho**	**Northwest Nazarene University**	**College of Idaho**	**ABCTE**	**Teach for America – Idaho**
41.04% **Effective**	**23.91%** **Low Performing**	**60.53%** **Effective**	**35.19%** **At Risk**	**80.00%** **Effective**	**21.60%** **Low Performing**	**48.00%** **Effective**	**100%** **Effective**	**68.18%** **Effective**	**91%** **Effective**
Retention Rate (2 Points Available)				Data comparing 2017-2018 new teachers to those still teaching in Idaho as of 2021-2022 (5th Year Retention Rate)					
Boise State University	**University of Idaho**	**Idaho State University**	**Lewis-Clark State College**	**College of Southern Idaho**	**BYU – Idaho**	**Northwest Nazarene University**	**College of Idaho**	**ABCTE**	**Teach for America – Idaho**
77.9% **Effective**	**75.4%** **Effective**	**75.2%** **Effective**	**79.4%** **Effective**	**N/A**[1]	**65.5%** **At Risk**	**78.7%** **Effective**	**76.2%** **Effective**	**76.7%** **Effective**	**42.1%** **Low Performing**
High Need Retention Rate (2 Points Available)				Data comparing 2017-2018 new teachers in federally designated Teacher Cancellation Low Income (TCLI) schools to those still teaching in Idaho TCLI schools as of 2021-2022 (5th Year Retention Rate)					
Boise State University	**University of Idaho**	**Idaho State University**	**Lewis-Clark State College**	**College of Southern Idaho**	**BYU – Idaho**	**Northwest Nazarene University**	**College of Idaho**	**ABCTE**	**Teach for America – Idaho**
77.6% **Effective**	**74.2%** **Effective**	**75.2%** **Effective**	**79.7%** **Effective**	**N/A**[1]	**64.9%** **At Risk**	**78.8%** **Effective**	**75.0%** **Effective**	**76.2%** **Effective**	**38.0%** **Low Performing**

ATTACHMENT 1

Category 3: **Survey Outcomes** (25% Weighting)									
Alumni Feedback (15 Points Available)						**15-question survey regarding quality of preparation sent from EPPs to completers** (Rated on the same rubric scale as the state's evaluation framework)			
Boise State University	**University of Idaho**	**Idaho State University**	**Lewis-Clark State College**	**College of Southern Idaho**	**BYU – Idaho**	**Northwest Nazarene University**	**College of Idaho**	**ABCTE**	**Teach for America – Idaho**
3.0 Effective	**3.0 Effective**	**3.0 Effective**	**3.2 Effective**	**3.4 Effective**	**3.0 Effective**	**3.1 Effective**	**0[2] Low Performing**	**N/A[2]**	**N/A[3]**
Employer Feedback (10 Points Available)						**15-question survey regarding quality of preparation sent from EPPs to employers** (Rated on the same rubric scale as the state's evaluation framework)			
Boise State University	**University of Idaho**	**Idaho State University**	**Lewis-Clark State College**	**College of Southern Idaho**	**BYU – Idaho**	**Northwest Nazarene University**	**College of Idaho**	**ABCTE**	**Teach for America – Idaho**
3.1 Effective	**3.1 Effective**	**3.1 Effective**	**0[2] Low Performing**	**4.0[4] Effective**	**3.1 Effective**	**3.1 Effective**	**0[2] Low Performing**	**N/A[2]**	**N/A[3]**

[1] CSI's first cohort started in Fall of 2018. The four year retention rate is 100%.

[2] No survey data was provided

[3] Arrangements would need to be made with ABCTE and TFA Idaho to collect the survey data going forward.

[4] CSI received two responses for two alumni from one administrator on the Employer Feedback Survey.

ATTACHMENT 1

Category 4: **Characteristics of Teacher Preparation Programs** (52% Weighting)									
Content & Pedagogical Knowledge (26 Points Available)						**Full state review of all programs every seven years.** Assessed through program approval recommendations based on evidence of meeting the requirements of the *Idaho Standards for Initial Certification of Professional School Personnel*.			
Boise State University	**University of Idaho**	**Idaho State University**	**Lewis-Clark State College**	**College of Southern Idaho**	**BYU – Idaho**	**Northwest Nazarene University**	**College of Idaho**	**ABCTE**	**Teach for America – Idaho**
100% Approved or Conditionally Approved Effective	100% Approved or Conditionally Approved Effective	100% Approved or Conditionally Approved Effective	100% Approved or Conditionally Approved Effective	100% Approved or Conditionally Approved Effective	100% Approved or Conditionally Approved Effective	100% Approved or Conditionally Approved Effective	100% Approved or Conditionally Approved Effective	100% Approved or Conditionally Approved Effective	100% Approved or Conditionally Approved Effective
Quality Clinical Preparation & Rigorous Exit Qualifications (26 Points Available)						**Reviewed every third/fourth year, both as part of the full state reviews and focused visits.** Assessed through program approval ratings on State Specific Requirements (SSRs) related to clinical practice and qualifications for certification (including a successful score on statewide Common Summative Assessment of Teaching based upon the state's framework and development of an Individualized Professional Learning Plan)			
Boise State University	**University of Idaho**	**Idaho State University**	**Lewis-Clark State College**	**College of Southern Idaho**	**BYU – Idaho**	**Northwest Nazarene University**	**College of Idaho**	**ABCTE**	**Teach for America – Idaho**
N/A[5] Clinical Hours *Required: 640 hours*	**N/A**[5] Clinical Hours *Required: 640 hours*	**N/A**[5] Clinical Hours *Required: 640 hours*	**N/A**[5] Clinical Hours *Required: 600 hours*	**N/A**[5] Clinical Hours *Required: 240 hours*	**N/A**[5] Clinical Hours *Required: 500 hours*	**N/A**[5] Clinical Hours *Required: 640 hours*	**N/A**[5] Clinical Hours *Required: 640 hours*	**N/A**[5] Clinical Hours *Required: 0 hours*	**N/A**[5] Clinical Hours *Required: 0 hours*

[5] These factors are no longer present in the standards; future state reviews will fail to yield data relevant to this subcategory as it was adopted by the Board. This measure can't be applied through all institutions.

ATTACHMENT 1

EDUCATOR PREPERATION PROGRAM RATINGS									
OVERALL PROGRAM RATING (Based on 100 Available Points)						**Sum of Points from All 4 Categories** 70 Points or More = Program is rated as **Effective** 41 to 69 Points = Program is **At Risk** of becoming Low Performing 0 to 40 Points = Program is rated as **Low Performing**			
Boise State University	**University of Idaho**	**Idaho State University**	**Lewis-Clark State College**	**College of Southern Idaho**	**BYU – Idaho**	**Northwest Nazarene University**	**College of Idaho**	**ABCTE**	**Teach for America – Idaho**
71/74[6] **Effective**	**68/74**[6] **Effective**	**71/74**[6] **Effective**	**61/74**[6] **Effective**	**70/70**[7] **Effective**	**65/74**[6] **Effective**	**72/74**[6] **Effective**	**49/74**[6] **At Risk**	**49/49**[8] **Effective**	**45/49**[8] **Effective**

[6] The total amount of points possible on the Performance Measures Report were seventy-four (74) points due to omitting the "Quality Clinical Preparation and Rigorous Exit Qualifications" subcategory. The same percentages to determine the "Overall Rating" is used. Overall scores from zero percent (0%) to forty percent (40%) are rated as "Low Performing", forty-one percent (41%) to sixty-nine percent (69%) are rated as "At Risk", and seventy percent (70%) to one hundred percent (100%) are rated as "Effective.

[7] The total amount of points possible on the Performance Measures Report for College of Southern Idaho were seventy (70) points due to omitting the "Quality Clinical Preparation and Rigorous Exit Qualifications" subcategory, "Retention Rate" subcategory, and the "High Need Retention Rate" subcategory. The same percentages to determine the "Overall Rating" is used. Overall scores from zero percent (0%) to forty percent (40%) are rated as "Low Performing", forty-one percent (41%) to sixty-nine percent (69%) are rated as "At Risk", and seventy percent (70%) to one hundred percent (100%) are rated as "Effective.

[8] The total amount of points possible on the Performance Measures Report for ABCTE and Teach for America - Idaho were forty-nine (49) points due to omitting the "Completer and Alumni Surveys" and the "Quality Clinical Preparation and Rigorous Exit Qualifications" subcategories. The same percentages to determine the "Overall Rating" is used. Overall scores from zero percent (0%) to forty percent (40%) are rated as "Low Performing", forty-one percent (41%) to sixty-nine percent (69%) are rated as "At Risk", and seventy percent (70%) to one hundred percent (100%) are rated as "Effective".

ATTACHMENT 1

EPP Performance Scoring Rubric

Category 1: Student Learning Outcomes (15% Weighting)					
Subcategory	**Description**	**Source**	**Effective**	**At Risk**	**Low Performing**
Student Growth	% of completers in their first year who had a majority of their students meet measurable student achievement / student success indicator targets.	Career ladder data reporting	> 80% **10 points**	50% to 80% **5 points**	< 50% **0 points**
Teacher Evaluation Measures	Average # of components on the state framework rated as "unsatisfactory" for first year completers.	Career ladder data reporting	< 0.5 **5 points**	0.5 to 1.5 **2 points**	> 1.5 **0 points**

Category 2: Teacher Employment Outcomes (8% Weighting)					
Subcategory	**Description**	**Source**	**Effective**	**At Risk**	**Low Performing**
Placement Rate	% of completers who obtained a teaching assignment in Idaho public schools in the following school year	Derived from ISEE & Title II reporting data	> 60% **2 points**	40% to 60% **1 point**	< 40% **0 points**
High Need Placement Rate	% of completers who obtained a teaching assignment in an Idaho high need public school the following school year (as defined by federal Teacher Cancellation Low-Income designation)	Derived from ISEE & Title II reporting data	> 40% **2 points**	25% to 40% **1 point**	< 25% **0 points**
Retention Rate	% of completers who started teaching in Idaho and are still teaching in an Idaho public school in their 5th year.	Derived from ISEE & Title II reporting data	> 70% **2 points**	60% to 70% **1 point**	< 60% **0 points**

High Need Retention Rate	% of completers who started teaching in an Idaho high need public school and are still teaching in an Idaho high need public school in their 5th year (as defined by federal Teacher Cancellation Low-Income designation)	Derived from ISEE & Title II reporting data	> 65% **2 points**	55% to 65% **1 point**	< 55% **0 points**
Category 3: Survey Outcomes (25% Weighting)					
Subcategory	**Description**	**Source**	**Effective**	**At Risk**	**Low Performing**
Alumni Feedback	Average rating on the 15 questions posed on a survey regarding quality of preparation (rated 1-4 using the Danielson Framework scale, rounded to nearest tenth)	Alumni survey distributed annually by IACTE members	≥ 3.3 → **15 pts** 3.2 → **14 pts** 3.1 → **13 pts** 3.0 → **12 pts** 2.9 → **11 pts** 2.8 → **10 pts** 2.7 → **9 pts** 2.6 → **8 pts** 2.5 → **7 pts**	2.4 → **6 pts** 2.3 → **5 pts** 2.2 → **4 pts** 2.1 → **3 pts** 2.0 → **2 pts** 1.9 → **1 pts**	≤ 1.8 → **0 pts**
Employer Feedback	Average rating on the 15 questions posed on a survey regarding quality of preparation (rated 1-4 using the Danielson Framework scale, rounded to nearest tenth)	Employer survey distributed annually by IACTE members	≥ 3.0 → **10 pts** 2.9 → **9 pts** 2.8 → **8 pts** 2.7 → **7 pts** 2.6 → **6 pts**	2.5 → **5 pts** 2.4 → **4 pts** 2.3 → **3 pts** 2.2 → **2 pts** 2.1 → **1 pts**	≤ 2.0 → **0 pts**

Category 4: Characteristics of Teacher Preparation Programs (52% Weighting)					
Subcategory	**Description**	**Source**	**Effective**	**At Risk**	**Low Performing**
Content & Pedagogical Knowledge	% of programs approved or conditionally approved by state review process. (Evidence may include evaluation of syllabi, Praxis scores, GPA, exams, and	Full state review of all programs every seven years.	> 90% **26 points**	75% to 90% **10 points**	< 75% **0 points**

	artifacts of candidate work)				
Quality Clinical Preparation & Rigorous Exit Qualifications	% of standards in SSRs related to clinical practice and qualifications for certification that are rated better than "unacceptable." (Evidence may include performance on the statewide Common Summative Assessment of Teaching and development of an IPLP)	Reviewed every third/fourth year, both as part of the full state program reviews and focused visits.	> 90% **26 points**	75% to 90% **10 points**	> 75% **0 points**

PROFESSIONAL STANDARDS COMMISSION

SUBJECT

Board Policy IV.B.10 State Department of Education – Instructional Staff Certificate Endorsements – Second Reading

REFERENCE

August 2021	Board approved proposed rules Dockets 08-0201-2101, 08-0202-2102, and 08-0203-2101. Initiating amendments pursuant to Zero Based Regulation Initiative.
October 2021	Board approved omnibus rule for IDAPA 08, incorporating proposed rule amendments approved at the August 2021 Board meeting.
June 2022	Board approved the first reading of proposed changes to Board Policy IV.B., adding instructional staff certificate endorsements that had been removed from Idaho Administrative Code 08.02.02 effective March 15, 2022.
August 2022	Board approved the second reading of proposed changes to Board Policy IV.B.
October 2022	Board approved the first reading of proposed policy amendments, incorporating amendments to the certification endorsements requested by the PSC and Department staff.

APPLICABLE STATUTE, RULE, OR POLICY

State Board of Education Governing Policies and Procedures IV.B.
Sections 33-1201 through 33-1204, Idaho Code
Idaho Administrative Code, IDAPA 08.02.02
Executive Order 2020-01

BACKGROUND/DISCUSSION

At the June 2021 meeting of the Professional Standards Commission (Commission), the Commission reviewed several revisions to IDAPA 08.02.02.022-.024, Instructional Certificate Endorsements, for recommendation to the Idaho State Board of Education (Board) for consideration. Recommendations included revision of additional subject areas applicable to the all subjects K-8 endorsement; addition of an Early Literacy (K-3) endorsement, clarification of Humanities and Online Teacher endorsements; addition of completion options to the Social Studies endorsement, and addition of the Teacher Leader-Instructional Technology endorsement. The Board did not act on the recommendations of the Commission at that time, as instructional certificate endorsements were recommended to be removed altogether from Idaho Administrative Code in compliance with Executive Order 2020-01, Zero Based Regulations, for future

insertion into Board policy. The amended rule removing the endorsements took effect March 15, 2022.

On June 17, 2022, the Commission reconsidered the revisions to instructional certificate endorsements that had been presented in June 2021, and re-recommended the amendments, this time to Board Policy IV.B, Instructional Staff Certificate Endorsements to the Board for approval.

In addition to the revisions proposed by the Commission, the Certification and Professional Standards staff of the State Department of Education recommend an additional amendment to the All Subjects (K-8) endorsement. Currently, the All Subjects (K-8) endorsement requires "a minimum of one additional subject area endorsement allowing teaching of that subject through grade 9 or kindergarten through grade 12." The Department staff recommend the requirement for an additional subject area endorsement be removed. The removal of this requirement will provide seekers of the All Subjects (K-8) endorsement with the flexibility to choose a 45 credit All Subjects (K-8) endorsement or a 30 credit All Subjects (K-8) endorsement along with a 20 credit endorsement in any other subject area. In light of the current state-wide teacher shortage, this increased flexibility may allow more candidates to complete their educator preparation program and receive a standard instructional certificate with an All Subjects (K-8) endorsement.

IMPACT

Amendments to endorsement language will provide additional flexibility for educator preparation program candidates.

ATTACHMENTS

Attachment 1 – Proposed revisions to Board Policy IV.B.

STAFF COMMENTS AND RECOMMENDATIONS

Section 33-1201, Idaho Code, requires each person employed in any elementary or secondary school in the capacity of teacher, supervisor, administrator, education specialist, school nurse or school librarian to have and to hold a certificate issued under authority of the State Board of Education, valid for the service being rendered. Certificate endorsements identify the subject area and grade range of each certificate. Instructional certificates may include multiple endorsement areas. Chapter 12, Title 33, Idaho Code, includes various provisions requiring the Board to specify the minimum college training requirements or the duration or renewal processes for educator certificates in rule. It does not require the Board to establish the subject area credit requirements for endorsements in rule. By moving these provisions to Board Policy, the Board will be able to be more responsive to requests from public schools to adjust these requirements, if needed, to help with the current teacher shortage.

During the 2022 legislative session, staff received some feedback from a few legislators expressing concern about removing the endorsements from

Administrative Code. Staff assured legislators that the process for establishing Board policy, requires a transparent and open process with multiple opportunities for the public to give input.

The proposed amendments are extensive and touch on every existing endorsement. The most substantive amendments are:

- All subjects (K-8), increased the number of credit hours from 20 semester credit hours to 30 while eliminating the requirement that it be accompanied by a second endorsement allowing the instructional staff to teach a specific subject area through at least grade 9.

- American Government/Political Science, adds requirement that coursework includes methods of teaching social sciences.

- Anthropology (5-9 or 6-12), new endorsement in sociology content area.

- Bilingual Education (K-12), adds a requirement for candidate to score an advanced or higher on an oral proficiency assessment conducted by an objective second party.

- Blended Elementary Education/Elementary Special Education (4-6), prohibits use in a middle school setting.

- Blind and Low Vision (Pre-K-12), creates a new endorsement. This endorsement is not required to teach students who are blind or have low vision. Replaces the Visual Impairment (Pre-K-12) endorsement.

- Early Literacy (K-3), creates a new endorsement. This endorsement is not required to teach early literacy. There is an existing endorsement that already covers this grade range, Literacy (K-12).

- Social Studies, currently there are two social studies endorsements, social studies (5-9) and social studies (6-12). The endorsement for grades 5 through 9 requires 20 credit hours, five credits each in history, geography, American government/political science or economics. The endorsement for grades 6 through 12 requires a subject specific endorsement in history, American government/political science, economics, or geography and a minimum of twelve credit hours in a second identified subject area, resulting in a total of 32 credits. The new options result in a Social Studies (6-12) endorsement requiring between 32, 36 or 48 credit hours.

- Teacher Leader – Instructional Technology, adds a new endorsement that is not required to provide any type of instruction. Adds to the list of existing teacher leader endorsement of: instructional specialist, literacy, mathematics, and special education. In FY 2022 there were 934

instructional staff with the Teacher Leader - Special Education Endorsement, two with the Instructional Specialist, and 153 with the mathematics focus area. There are no instructional staff with the Teacher Leader – Literacy endorsement.

- Visual Impairment (Pre-K-12), removed. Pursuant to Section 33-1201B, Idaho Code, individuals who held a specific endorsement issued or recognized by the State Board of Education shall continue to hold the specific endorsement and be recognized as holding the specific endorsement even if, in the future, the State Board of Education ceases to issue or recognize such specific endorsements.

Two written comments were received between the first and second reading, the first comment was supporting the removal of the requirement for holders of the All Subjects (K-8) endorsement to also hold a second endorsement due to the added difficulty of individuals to complete this requirement and the challenges school districts are experiencing in hiring elementary school level instructional staff. The second comment was received from one of Idaho's approved educator preparation programs requesting the amendment not be made to remove the second endorsement area requirement. These comments identified the second area endorsement requirement increases the instructional staff persons employability, creates a built-in future career pivot, and creates more well-rounded individuals. Based on additional feedback from school district administrators the amendment is being left as originally recommended by the Professional Standards Commission. Once an individual completes their educator preparation program and enters the classroom there are multiple routes they can take to add additional subject area endorsements onto their instructional staff certificate.

There have been no amendments between what was approved as the first reading and the second reading. Staff recommends approval.

BOARD ACTION

I move to approve the second reading of Board Policy IV.B., Instructional Staff Certificate Endorsements, as provided in Attachment 1.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

ATTACHMENT 1

Idaho State Board of Education
GOVERNING POLICIES AND PROCEDURES
SECTION: IV. ORGANIZATION SPECIFIC POLICIES AND PROCEDURES
Subsection: B. State Department of Education **August 2022**

1. Purpose

   The State Department of Education is established by Section 33-125, Idaho Code, as an executive agency of the State Board of Education for elementary and secondary school matters.

2. State Superintendent of Public Instruction

   The State Superintendent of Public Instruction is an elected public official, serves as the executive secretary of the Board, and is the executive officer of the State Department of Education. The State Superintendent of Public Instruction (hereinafter known as the "superintendent") is responsible for carrying out the policies, procedures, and duties authorized by applicable state and federal statutes and the policies and procedures of the Board for the elementary and secondary schools in Idaho.

3. Department Organization

   The State Department of Education (hereinafter known as the "department") is organized in a manner as determined by the Board acting on recommendations by the superintendent.

4. General Scope of Department Responsibilities

   The department is responsible for public elementary and secondary school matters as provided by Title 33, Idaho Code, or as determined by the State Board of Education.

5. Consultant and Advisory Services

   The Board allows payments to be made to staff members of the department for consultative services to agencies or organizations other than the public elementary and secondary schools. Such payments may be in addition to the certified salary of the employee and be made during the periods for which any regular salary is paid, as determined by the superintendent. Consultative services must not interfere with the time or duties of the staff member for the department. Requests to undertake consultative services must be submitted to the superintendent or his or her designee and to the Board for prior approval.

6. Policy Manual for Idaho Public Schools

   The superintendent or his or her designee is responsible for the development, establishment, maintenance, and dissemination of the *State Board of Education Rules and Regulations for Public Schools K-12* as approved by the Board. The procedures

used to establish, amend, or otherwise modify the Policy Manual will be in accordance with Board policy and applicable state laws.

7. Internal Policies and Procedures

   The superintendent, as the chief executive officer, may establish such additional policies and procedures for the internal management of the department as are necessary and in alignment with the Board policies, Administrative Code, and Idaho Statute.

8. Basic Educational Technology Standards for Continuing Educators

   The proliferation of technology in our daily lives makes it essential that all students are provided an opportunity to become technologically literate. The State Board of Education has established a statewide goal that teachers and administrators be trained in the use of technology for education. This policy was created as a plan of action which provides recognition, encouragement and documentation of demonstrated competencies for educators and school districts by certificates of achievement and by school accreditation.

   a. Accountability and Recognition

      All state approved teacher education institutions or their trained designees (i.e., state department employees, district employees or community college faculty) will issue a State Certificate of Educational Technology Competency to those certificated personnel who have documented mastery of the required basic technology standards.

      The State Department of Education will issue annually a State Certificate of a Technology School of Excellence to those schools documenting that at least 90% of the certificated staff have earned the State Certificate of Educational Technology Competency.

      The State Department of Education will provide the State Board of Education an annual report on certificated personnel demonstrating mastery of the required basic technology standards by state, by district, and by school beginning with a baseline skill inventory that identifies the number of certificated personnel who have already demonstrated competency by the approved assessments. The results of this baseline will be available for Board review at the September 1998 Board meeting. Reports will continue annually on September 1999 through September of 2001 providing current data from the 1998-1999 school year and continuing through the 2000-2001 school year. The baseline and each annual report will include the following information by state, by district, and by school:

      i. Total certificated personnel
      ii. Total certificated personnel demonstrating technology competency
      iii. Total certificated administrative personnel
      iv. Total certificated administrative personnel demonstrating technology competency

v. Total certificated instructional personnel
vi. Total certificated instructional personnel demonstrating technology competency.

Information from the annual reports may be used to inform the citizens of Idaho of the relative standing of each school and each school district. The information will also be used to give proper recognition to schools making excellent progress towards or achieving the Board's goal. The Board staff will evaluate the policy annually.

9. Standards Approval
While maintaining a balance between the local control of school districts and the Idaho constitutional requirement for a uniform and thorough system of public education, the State Board of Education sets minimum standards to provide the framework through which our public school then provide educational opportunities to Idaho students. Prior to any standards being brought forward to the Board the applicable stakeholders and the public shall be provided with an opportunity to provide feedback. All standards being brought to the Board for consideration shall include the standards themselves, a description of how feedback was solicited, and a summary of the feedback that was received. Amendments to existing standards shall also include a redlined version of the standards showing all amendments.

a. Content Standards
The Idaho Content Standards articulate the minimum knowledge a student is expected to know and be able to use within a content (subject) area at specific grade levels. Content standards are reviewed and updated on a rotating basis in relation to the curricular materials adoption schedule, but may be updated more frequently if an area is identified as needing to be updated in advance of that schedule. Content standards review will be scheduled such that the content standard is reviewed in the year prior to the scheduled curricular materials review. At a minimum all content areas, including those without corresponding curricular materials, will be reviewed every six (6) years and notification will be made to the Office of the State Board of Education of the review and if the review will result in amendments to the standard or if it was determined that no amendments are necessary for the review cycle. Career Technical Education (CTE) content standard reviews will be facilitated by the Division of Career Technical Education and must meet the same review requirements as academic content standards.

The content standards review process will include at a minimum:
i. A review committee consisting of Idaho educators with experience in the applicable content area. The committee shall be made up of elementary and secondary instructional staff and at least one postsecondary faculty member from a four-year institution and at least one from a two-year institution, at least one public school administrator, and at least one parent of school aged children or representative of an organization representing parents with school aged children. Instructional staff and postsecondary

faculty members must have experience providing instruction in the applicable content area. Additional members may be included at the discretion of the Department. To the extent possible, representatives shall be chosen from a combination of large and small schools or districts and provide for regional representation.

ii. The review committee will make an initial determination regarding the need to update the standards.

iii. Based on the review, the committee shall meet to develop initial recommendations for the creation of new content standards or amendments to the existing content standards. The Department will provide multiple opportunities for public input on the draft recommendations including but not limited to the Department website and processes that allow for individuals in each region of the state to participate.

iv. Drafts of the recommended amendments will be made available to the public for comment for a period of not less than 20 days. At the close of the comment period the committee will finalize recommendations for Board consideration.

b. Standards for the Initial Certification of Professional School Personnel
The Standards for the Initial Certification of Professional School Personnel set the minimum standards certificated school personnel must meet in each certification and endorsement area to be eligible for certification or to receive subject area endorsements. Teacher preparation programs must be in alignment with these standards to be considered for approval or re-approval.

The standards are reviewed and updated based on a five (5) year cycle, where 20% of the standards are reviewed each year. Standards may be identified for review in advance of the five (5) year cycle, however, all standards must be reviewed every five (5) years. Reviews of CTE educator standards will be facilitated by the Division of Career Technical Education. The Professional Standards Commission (PSC) is responsible for reviewing and making recommendations to the Board on amendments or additions to the Standards for the Initial Certification of Professional School Personnel. The PSC will report annually to the Office of the State Board of Education the standards reviewed during the previous year and if that review resulted in recommendations for amendments or if no amendments were recommended during the review cycle.

10. Instructional Staff Certificate Endorsements
Individuals holding an instructional certificate or occupational specialist certificate must have one or more endorsements attached to their certificate. Instructional staff are eligible to teach in the grades and content areas of their endorsements. Occupational specialist certificate endorsements are listed in Board Policy IV.E. Division of Career Technical Education. The following credit requirement must be met to be eligible for each type of endorsement. Credits used for determining eligibility in one endorsement area may also be used to meet the requirements for a

corresponding endorsement area where the requirements overlap. Routes for Alternative Authorization for new endorsements are established in IDAPA 08.02.02.021.

a. All Subjects (K-8). ~~Allows one to teach in any educational setting (K-8). Twenty (20) semester credit hours, or thirty~~ Thirty (30) ~~quarter~~ semester credit hours ~~in the philosophical, psychological, methodological foundations, instructional technology, and professional subject matter must be in elementary education including at least six (6) semester credit hours, or nine (9) quarter credit hours, in developmental reading~~to include coursework in discipline-specific methods of teaching elementary subject areas, cognitive processes, learner development, learning differences, literacy and language development, K-8 subject content, classroom management and behavioral supports, instructional strategies and interventions, and formative and summative assessments. ~~This endorsement must be accompanied by at a minimum one (1) additional subject area endorsement allowing teaching of that subject through grade 9 or kindergarten through grade 12.~~

b. American Government /Political Science (5-9 or 6-12). Twenty (20) semester credit hours to include~~: a minimum of~~ coursework in methods of teaching the social sciences, six (6) semester credit hours in American government, six (6) semester credit hours in U.S. history survey, and ~~a minimum of~~ three (3) semester credit hours in comparative government. ~~Remaining course work must be selected from political science.~~ Course work may include three (3) semester credit hours in world history survey. Remaining coursework must be in political science.

c. Anthropology (5-9 or 6-12). Twenty (20) semester credit hours to include coursework in methods of teaching the social sciences and in the area of anthropology. Coursework may include six (6) semester credit hours in sociology.

~~c.~~d. Bilingual Education (K-12). Twenty (20) semester credit hours ~~leading toward competency as defined by Idaho Standards for Bilingual Education Teachers~~ to include ~~all of the following:~~ coursework in bilingual education methods; upper division coursework in one (1) modern language other than English, including writing and literature~~, and advanced proficiency according to the American Council on the Teaching of Foreign Languages guidelines~~; cultural diversity; ~~ESL/bilingual methods;~~ linguistics~~,~~; second language acquisition theory and practice; foundations of ESL/bilingual education~~,~~; legal foundations of ESL/bilingual education~~,~~; identification and assessment of English learners~~,~~; and biliteracy~~;~~. ~~at least one (1) semester credit hour in bilingual clinical field experience.~~ To obtain this endorsement, the candidate must score an advanced low or higher (as defined by the American Council on the Teaching of Foreign Languages or equivalent) on an oral proficiency assessment conducted by an objective second party.

~~d.~~e. Biological Science (5-9 or 6-12). Twenty (20) semester credit hours ~~including~~ to include coursework in ~~each of the following areas:~~methods of teaching science, lab safety, molecular and organismal biology, heredity, ecology, and biological adaptation.

~~e.~~f. Blended Early Childhood Education/Early Childhood Special Education (Birth - Grade 3). ~~The Blended Early Childhood Education/Early Childhood Special Education (Birth - Grade 3) endorsement allows one to teach in any educational setting birth through grade three (3). To be eligible, a candidate must have satisfied the following requirements a minimum of thirty~~ Thirty (30) semester credit hours ~~in the philosophical, psychological, and methodological foundations, in instructional technology, and in the professional subject matter of early childhood and early childhood special education. The professional subject matter shall~~ to include course work ~~specific to the child from birth through grade three (3) in the areas of~~in methods of teaching early childhood and special education, child development and learning~~;~~, curriculum development and implementation~~;~~, family and community relationships~~;~~, assessment and evaluation~~;~~, central concepts of birth - grade 3 subjects, professionalism~~;~~, and clinical experience including a combination of general and special education in the following settings: birth to age three (3), ages three to five (3-5), and grades K-3 general education.

g. Blended Elementary Education/Elementary Special Education (Grade 4 - Grade 6). ~~The Blended Elementary Education/Elementary Special Education (Grade 4 - Grade 6) endorsement allows one to teach in any grade four (4) through grade six (6) education setting, except in a middle school setting. This endorsement may only be issued in conjunction with the Blended Early Childhood Education/Early Childhood Special Education (Birth - Grade 3) endorsement. To be eligible for a Blended Elementary Education/Elementary Special Education (Grade 4 - Grade 6) endorsement, a candidate must have satisfied the following requirements: Completion of a program of a minimum of twenty~~ Twenty (20) semester credit hours ~~in elementary education and special education coursework~~ to include~~:~~ coursework in methods of teaching elementary and special education, ~~methodology and content knowledge (mathematics, literacy, science, health, physical education art), technology,~~central concepts of grade 4 - grade 6 subjects, assessment, and clinical experiences in grades four (4) through six (6). This endorsement may only be used in conjunction with the Blended Early Childhood/Early Childhood Special Education (Birth – Grade 3) endorsement and cannot be used in a middle school setting.

~~f.~~h. Blind and Low Vision (Pre-K-12) Thirty (30) semester credit hours to include coursework in methods of teaching the blind and visually impaired, assessment and evaluation, designing and monitoring individualized education programs, central concepts of academic subjects, special education law, family and community relationships, and accommodations and modifications for the blind and visually impaired.

~~g.~~i. Chemistry (5-9 or 6-12). Twenty (20) semester credit hours ~~in the area of chemistry,~~ to include coursework in ~~each of the following areas:~~ methods of teaching science, lab safety, and inorganic and organic chemistry.

~~h.~~j. Communication (5-9 or 6-12). ~~Follow~~ Complete one (1) of the following options:

i. ~~Option I --~~ Twenty (20) semester credit hours to include coursework in methods of teaching ~~speech/communications plus course work in at least four (4) of the following areas:~~ communication arts, interpersonal communication~~/human relations;~~, argumentation/personal persuasion~~;~~, group communication~~s;~~, nonverbal communication~~;~~, public speaking~~;~~, journalism/mass communication~~s;~~ and ~~drama/theater arts~~social media.

ii. ~~Option II -- Possess an~~Complete an endorsement in English ~~endorsement plus at least twelve~~and complete (12) semester credit hours ~~distributed among the following:~~to include coursework in methods of teaching communication arts, interpersonal communication~~/human relations~~, ~~public speaking, journalism/mass communications, and methods of teaching speech/communication~~argumentation/personal persuasion, and public speaking.

~~i.~~k. Computer Science (5-9 or 6-12). Twenty (20) semester credit hours ~~of course work in computer science, including~~ to include course work in ~~the following areas:~~methods of teaching computer science; data representation and abstraction; design, development, and testing algorithms; software development processes; digital devices, systems, and networks; and the role of computer science and its global impact ~~on the modern world; or~~ .

~~i. Occupational teacher preparation pursuant to Board Policy IV.E.~~

~~j.~~l. Deaf/Hard of Hearing (Pre-K-12). ~~Completion of a minimum of thirty~~Thirty-three (3~~3~~0) semester credit hours ~~in the area of deaf/hard of hearing with an emphasis on instruction for students who use sign language or completion of a minimum thirty-three (33) semester credit hours in the area of deaf/hard of hearing with an emphasis on instruction for students who use listening and spoken language. Coursework~~ to include~~:~~ coursework in methods of teaching the deaf/hard of hearing, bimodal communication, ~~American Sign~~ sign ~~Language~~language acquisition and learning, ~~listening and spoken language~~literacy development, ~~hearing assessment,~~ hearing ~~assistive~~ technology, spoken language development, students with disabilities, ~~pedagogy for teaching students who are deaf or hard of hearing,~~ assessments, designing and monitoring individualized education programs, and ~~clinical practice~~special education law.

m. Early Childhood Special Education (Pre-K-3). ~~The Early Childhood Special~~

~~Education (Pre-K-3) endorsement is non-categorical and allows one to teach in any Pre-K-3 special education setting. This endorsement may only be added to the Exceptional Child Generalist (K-8 or K-12) endorsement. To be eligible a candidate must have satisfied the following requirements: Completion of a program of a minimum of twenty~~ Twenty (20) semester credit hours ~~in the area of early childhood education~~ to include course~~-~~work in ~~each of the following areas:~~ methods of teaching early childhood; child development and behavior with emphasis in cognitive-language, physical, social, and emotional areas, birth through age eight (8); curriculum and program development for young children ages three to eight (3-8); transitional services; ~~methodology:~~ planning, implementing, and evaluating environments and materials for young children ages three to eight (3-8); ~~guiding young children's behavior: observing, assessing and individualizing ages three to eight (3-8);~~ identifying and working with atypical young children ages three to eight (3-8); designing and monitoring individualized education programs; special education law; and parent-teacher relations~~; and clinical practice at the Pre-K - 3 grades~~. This endorsement may only be added to the Exceptional Child Education (K-8 or K-12) endorsement.

~~k.~~n. Early Literacy (K-3). Twenty (20) semester credit hours to include coursework in methods of teaching reading and writing; the body of knowledge regarding the science of reading; the cognitive process of learning to read and write; phonological and phonemic awareness; oral language development; phonics, vocabulary, fluency, and comprehension; diagnostic literacy assessments and analysis leading to the development and implementation of individual reading improvement plans; data analysis related to early recognition of literacy difficulties including characteristics of dyslexia; data driven instruction and intervention; language acquisition and development; stages of reading and writing development; early elementary reading and writing resources including children's literacy advocacy strategies for meeting the needs of struggling readers and writers; and the Idaho Comprehensive Literacy Plan.

~~l.~~o. Earth and Space Science (5-9 or 6-12). Twenty (20) semester credit hours ~~including~~ to include course~~-~~work in ~~each of the following areas:~~methods of teaching science, lab safety, earth science, astronomy, and geology.

~~m.~~p. Economics (5-9 or 6-12). Twenty (20) semester credit hours to include ~~a minimum of~~coursework in methods of teaching the social sciences, three (3) semester credit hours ~~of~~ in micro~~-~~economics, ~~a minimum of~~ three (3) semester credit hours ~~of~~ in macro~~-~~economics, and ~~a minimum of~~ six (6) semester credit hours ~~of~~ in personal finance/consumer economics~~/economics methods~~. Remaining course work ~~may~~ must be ~~selected from~~in business, economics, or finance ~~course~~.

q. Engineering (5-9 or 6-12). Twenty (20) semester credit hours to include coursework in methods of teaching engineering and in areas of engineering ~~course~~

~~work~~.

~~n.~~r. English (5-9 or 6-12). Twenty (20) semester credit hours~~, including~~ to include coursework in ~~all of the following areas:~~secondary English language arts methods, grammar, American literature, British literature, multicultural/world literature, young adult literature, ~~and~~ literary theory~~. Additionally, a course in~~, and advanced composition~~, excluding the introductory sequence designed to meet general education requirements, and a course in secondary English language arts methods are required~~.

~~o.~~s. English as a Second Language (ESL) (K-12). Twenty (20) semester credit hours ~~leading toward competency as defined by Idaho Standards for ESL Teachers~~ to include ~~all of the following:~~coursework in methods of teaching language acquisition, a modern language other than English~~,~~, cultural diversity~~,~~ ~~ESL methods;~~ linguistics~~; ~~, second language acquisition theory and practice~~; ~~, foundations of ESL/bilingual education, legal foundations of ESL/bilingual education, and identification and assessment of English learners~~; and at least one (1) semester credit in ESL clinical field experience~~.

~~p.~~t. Exceptional Child ~~Generalist~~ Education (K-8, 6-12, or K-12). ~~The Exceptional Child Generalist endorsement is non-categorical and allows one to teach in any special education setting, applicable to the grade range of the endorsement. Regardless of prior special education experience, all initial applicants must provide an institutional recommendation that an approved special education program has been completed, with clinical experience to include student teaching in an elementary or secondary special education setting. To be eligible, a candidate must complete thirty~~ Thirty (30) semester credit hours to include coursework in methods of teaching the exceptional child, learner development and individual learning differences, assessment and evaluation, designing and monitoring individualized education programs, central concepts of academic subjects, individual behavioral supports, instructional strategies and interventions, special education law, ~~or closely related areas, as part of an approved special education program~~family and community relationships, and accommodations and modifications.

~~q.~~u. Geography (5-9 or 6-12). Twenty (20) semester credit hours ~~including~~ to include course~~—~~work in methods of teaching the social sciences, cultural geography, and physical geography, and a maximum of six (6) semester credit hours in world history survey. Coursework may include three (3) semester credit hours in economics. ~~The r~~Remaining ~~semester credit hours~~coursework must be ~~selected from~~in geography.

~~r.~~v. Geology (5-9 or 6-12). Twenty (20) semester credit hours to include coursework in methods of teaching science, lab safety, and in the area of geology.

~~s.~~w. Gifted and Talented Education (K-12). Twenty (20) semester credit hours ~~leading toward competency as defined by Idaho Standards for Teachers of Gifted and Talented Students,~~ to include coursework in ~~the following areas of gifted and talented education: foundations,~~ methods of teaching gifted and talented learners, assessment and identification of gifted and talented learners, differentiated instruction, creative and critical thinking, social and emotional needs of gifted and talented learners, program design, curriculum, and instruction~~, assessment and identification, differentiated instruction, program design, and clinical practice~~.

x. Health (5-9, 6-12, or K-12). Twenty (20) semester credit hours to include course work in ~~each of the following areas:~~secondary methods of teaching health; planning, organization~~,~~/ and administration~~/planning~~ of a school health program; health, wellness, and behavior change; ~~secondary methods of teaching health, to include field experience in a traditional classroom;~~ mental/emotional health; nutrition; human sexuality; ~~substance use and abuse~~and health risk behaviors. Remaining semester credits must be in health-related course~~-~~work. To obtain a Health (K-12) endorsement, applicants must complete ~~an~~ coursework in elementary health methods~~ course~~.

~~t.~~y. History (5-9 or 6-12). Twenty (20) semester credit hours to include ~~a minimum of~~ coursework in methods of teaching the social sciences, six (6) semester credit hours ~~of~~ in U.S. history survey, and ~~a minimum of~~ six (6) semester credit hours ~~of~~ in world history survey. ~~Remaining course work must be in history.~~ Course~~-~~work may include three (3) semester credit hours in American government. Remaining course-work must be in history.

z. Humanities (5-9 or 6-12). Complete ~~An~~ an endorsement in English, history, music, ~~visual art, drama~~theatre arts, visual arts, or ~~foreign~~ world language; and complete twenty (20) semester credit hours ~~in one of the following areas or ten (10) semester credit hours in each of two (2) of the following areas: literature, music, foreign language, humanities survey, history, visual art, philosophy, drama, comparative world religion, architecture, and dance.~~as follows:

i. English endorsement - twenty (20) semester credit hours in two (2) or more of the following areas: architecture, comparative world religion, dance, history, humanities survey, music, philosophy, theatre arts, visual arts, and world language.

ii. History endorsement - twenty (20) semester credit hours in two (2) or more of the following areas: architecture, comparative world religion, dance, humanities survey, literature, music, philosophy, theatre arts, visual arts, and world language.

iii. Music endorsement - twenty (20) semester credit hours in two (2) or more of the following areas: architecture, comparative world religion, dance,

history, humanities survey, literature, philosophy, theatre arts, visual arts, and world language.

iv. Theatre arts endorsement - twenty (20) semester credit hours in two (2) or more of the following areas: architecture, comparative world religion, dance, history, humanities survey, literature, music, philosophy, visual arts, and world language.

v. Visual arts endorsement - twenty (20) semester credit hours in two (2) or more of the following areas: architecture, comparative world religion, dance, history, humanities survey, literature, music, philosophy, theatre arts, and world language.

~~i.~~vi. World language endorsement - twenty (20) semester credit hours in two (2) or more of the following areas: architecture, comparative world religion, dance, history, humanities survey, literature, music, philosophy, theatre arts, and visual arts.

~~u.~~aa. Journalism (5-9 or 6-12). ~~Follow~~ Complete one (1) of the following options:

i. ~~Option I --~~ Twenty (20) semester credit hours in the area of journalism to include ~~a minimum of fourteen (14) semester credit hours in journalism~~coursework in methods of teaching communication arts and six (6) semester credit hours in ~~English and/or mass~~ communication arts.

ii. ~~Option II -- Possess~~ Complete an English endorsement ~~with a minimum of six (6)~~ and twelve (12) semester credit hours to include coursework in methods of teaching communication arts and in the area of journalism.

~~v.~~bb. Literacy (K-12). Twenty (20) semester credit hours ~~leading toward competency as defined by Idaho Standards for Literacy Teachers~~ to include coursework in methods of teaching reading and writing; ~~the following areas:~~ foundations of literacy ~~(~~including reading, writing, listening, speaking, viewing, and language~~)~~; ~~development and~~language acquisition and development; diversity of literacy learners; literacy in the content area; literature for youth; ~~language development; corrective/~~diagnostic~~/remedial~~ reading~~; writing methods; and reading methods. To obtain a Literacy endorsement, applicants must complete the Idaho Comprehensive Literacy Course or the Idaho Comprehensive Literacy Assessment.~~ and writing; literacy assessments; data analysis and identification of characteristics of literacy difficulties including dyslexia; data driven instruction; instructional interventions; and the Idaho Comprehensive Literacy Plan.

~~w.~~cc. Mathematics (6-12). Twenty (20) semester credit hours ~~including~~ to include course work in ~~each of the following areas:~~secondary methods of teaching mathematics, Euclidean and transformational geometry, linear algebra, discrete

mathematics, statistical modeling and probabilistic reasoning, and the first two (2) courses in a standard calculus sequence. ~~A minimum of two (2) of these twenty (20) credits must be focused on secondary mathematics pedagogy. Statistics course work may be taken from a department other than the mathematics department.~~

~~x.~~dd. Mathematics - Middle Level (5-9). Twenty (20) semester credit hours to include coursework in ~~Mathematics content course work in~~secondary methods of teaching mathematics, algebraic thinking, functional reasoning, Euclidean and transformational geometry, and statistical modeling and probabilistic reasoning. ~~A minimum of two (2) of these twenty (20) credits must be focused on secondary mathematics pedagogy.~~ Six (6) semester credit hours of computer programming may be substituted for six (6) semester ~~credits in~~ credit hours of mathematics content.

~~y.~~ee. Music (5-9 or 6-12 or K-12). Twenty (20) semester credit hours ~~leading toward competency as defined by Idaho Standards for Music Teachers~~ to include course~~-~~work in secondary methods of teaching music, ~~the following:~~ theory and harmony~~;~~, aural skills, music history~~; ,~~ conducting~~; ,~~ applied music~~; ,~~ and piano proficiency (class piano or applied piano)~~, and secondary music methods/materials~~. To obtain a Music (K-12) endorsement, applicants must complete ~~an~~ elementary music methods coursework.

~~z.~~ff. Natural Science (5-9 or 6-12). ~~Follow~~ Complete one (1) of the following options:

i. ~~Option I -- Must hold~~Complete an ~~existing~~ endorsement in one of the following ~~areas~~: biological science, chemistry, Earth science, geology, or physics; and complete a total of twenty-four (24) semester credit hours as follows:

1) ~~Existing~~ Biological ~~Science~~ science ~~Endorsement~~endorsement. Eight (8) semester credit hours in each of the following ~~areas~~: ~~physics,~~ chemistry, physics, and Earth science or geology.

2) ~~Existing~~ Chemistry ~~E~~endorsement. Eight (8) semester credit hours in each of the following ~~areas~~: biology, physics, and Earth science or geology.

3) ~~Existing~~ Earth science or ~~G~~geology ~~E~~endorsement. Eight (8) semester credit hours in each of the following ~~areas~~: biology, chemistry, and physics~~, and chemistry~~.

~~1)~~4) ~~Existing~~ Physics ~~Endorsement~~endorsement. Eight (8) semester credit

hours in each of the following areas: biology, chemistry, and Earth science or geology.

~~i. Existing Chemistry Endorsement. Eight (8) semester credit hours in each of the following areas: biology, physics, and Earth science or geology.~~

~~2)~~1)

~~3)~~1) ~~Existing Earth science or Geology Endorsement. Eight (8) semester credit hours in each of the following areas: biology, physics, and chemistry.~~

ii. ~~Option II -- Must hold~~Complete an ~~existing~~ endorsement in Agriculture Science and Technology~~;~~ , and complete twenty-four (24) semester credit hours ~~with at least~~to include coursework in methods of teaching science, lab safety, and six (6) semester credit hours in each of the following ~~areas~~: biology, chemistry, physics, and Earth science or geology~~, and physics~~.

~~aa.~~ Online ~~-~~ Teacher (K-12). ~~To be eligible for an Online Teacher (K-12) endorsement, a candidate must have satisfied the following requirements:~~

~~i. Meets the state's professional teaching and/or licensure standards and is qualified to teach in his/her field of study.~~

~~ii. Provides evidence of online course time as a student and demonstrates online learning experience.~~

~~iii. Has completed an eight (8) week online clinical practice in a K-12 program, or has one (1) year of verifiable and successful experience as a teacher delivering curriculum online in grades K-12 within the past three (3) years.~~

~~iv. Provides verification of completion of a state-approved program of at least twenty (20) semester credit hours of study in online teaching and learning at an accredited college or university or a state-approved equivalent.~~

~~bb.~~gg. ~~Demonstrates proficiency in the Idaho Standards for Online Teachers.~~Twenty (20) semester credit hours to include coursework in methods of online teaching; assistive technology; learning management systems and content management systems; synchronous, asynchronous, and blended learning environments; and instructional strategies for the online environment. Candidates must complete an eight (8)-week online clinical practice in a K-12 setting or complete one (1) year of verifiable, successful experience as a teacher delivering online instruction in a K-12 setting within the past three (3) years.

~~cc.~~hh. Physical Education (PE) (5-9 or 6-12 or K-12). Twenty (20) semester credit

hours to include course work in ~~each of the following areas:~~secondary methods of teaching PE; ~~personal and teaching competence in~~ sports, skillful movement, physical activity, and outdoor skills; ~~secondary PE methods; administration and curriculum to include field experiences in physical education;~~ student evaluation in PE; safety and prevention of injuries; fitness and wellness; PE for special populations; exercise physiology; kinesiology/biomechanics; motor behavior; and current ~~CPR and first aid~~ certification in cardiopulmonary resuscitation, automated external defibrillator use, and first aid. To obtain a PE K-12 endorsement, applicants must complete ~~an~~ coursework in elementary PE methods ~~course~~.

~~dd.~~ii. Physical Science (5-9 or 6-12). Twenty (20) semester credit hours to include coursework in methods of teaching science, lab safety, and in the area of physical science to include a minimum of eight (8) semester credit hours in each of the following: chemistry and physics.

~~ee.~~jj. Physics (5-9 or 6-12). Twenty (20) semester credit hours to include coursework in methods of teaching science, lab safety, and in the area of physics.

~~ff.~~kk. Psychology (5-9 or 6-12). Twenty (20) semester credit hours to include coursework in methods of teaching the social sciences and in the area of psychology.

~~gg.~~ll. Science – Middle Level (5-9). Twenty-four (24) semester credit hours ~~in science content~~ to include coursework ~~including at least~~ in methods of teaching science, lab safety, and eight (8) credits in each of the following: biology, earth science, and physical science ~~to include lab components. Science foundation standards must be met~~.

mm. Social Studies (6-12). Complete one of the following options:

i. A course in methods of teaching the social sciences and twelve (12) semester credit hours in each of the following: American government/political science, economics, geography, and history

ii. A course in methods of teaching the social sciences, fifteen (15) semester credit hours in each of the following: American government/political science and history, and nine (9) semester credit hours in each of the following: economics and geography.

iii. ~~Must have~~Complete an endorsement in ~~history,~~ American government/political science, economics, ~~or~~ geography, or history ~~plus a minimum of twelve (12) semester credit hours in each of the remaining core endorsements areas: history, geography, economics, and American government/political science.~~ and complete a total of thirty-six (36) semester credit hours as follows:

1) American government/political science endorsement - twelve (12) semester credit hours in each of the following: economics, geography, and history.
2) Economics endorsement – twelve (12) semester credit hours in each of the following: American government/political science, geography, and history.
3) Geography endorsement – twelve (12) semester credit hours in each of the following: American government/political science, economics, and history.
~~1)~~4) History endorsement – twelve (12) semester credit hours in each of the following: American government/political science, economics, and geography.

~~hh.~~nn. Social Studies – Middle Level (5-9). Twenty (20) ~~Semester~~ semester credit hours ~~in social studies content~~to include coursework ~~including~~ in methods of teaching the social sciences and at least five (5) ~~credits~~ semester credit hours in each of the following: ~~history,~~ geography, history, and American government/political science or economics. ~~Social studies foundations must be met.~~

~~ii.~~oo. Sociology (5-9 or 6-12). Twenty (20) semester credit hours to include coursework in methods of teaching the social sciences and in the area of sociology. Coursework may include six (6) semester credit hours in anthropology.

~~jj. Sociology/Anthropology (5-9 or 6-12). Twenty (20) semester credit hours including a minimum of six (6) semester credit hours in each of the following: anthropology and sociology.~~

~~kk.~~pp. Teacher Leader. Teacher leaders hold a standard instructional certificate or a degree based career technical certificate and provide technical assistance to teachers and other staff ~~in the local education agency~~ with regard to the selection and implementation of appropriate teaching materials, instructional strategies, and procedures to improve ~~the~~ educational outcomes for students. ~~Candidates~~ Individuals who hold this endorsement facilitate the design and implementation of sustained, intensive, and job-embedded professional learning based on identified student and teacher needs.

~~i. Teacher Leader – Instructional Specialist – Eligibility of Endorsement. To be eligible for a Teacher Leader – Instructional Specialist endorsement on the Standard Instructional Certificate, a candidate must have satisfied the following requirements:~~

~~i.~~

~~ii. Education requirement: Hold a Standard Instructional Certificate. Content within coursework to include clinical supervision, instructional leadership, and advanced pedagogical knowledge, and have demonstrated~~

~~competencies in the following areas: providing feedback on instructional episodes; engaging in reflective dialogue centered on classroom instruction, management, and/or experience; focused goal-setting and facilitation of individual and collective professional growth; understanding the observation cycle; and knowledge and expertise in data management platforms.~~

i.

1) ~~Experience: Completion~~ Complete ~~of a minimum of~~ three (3) years~~'~~ of full-time certificated teaching experience while under contract in an accredited school setting.

2) ~~Provides verification of completion of~~Complete a state~~-~~ board approved program of at least twenty (20) post baccalaureate semester credit hours of study aligned to Idaho Teacher Leader Standards at an accredited college or university or a state~~-~~ board approved equivalent. Coursework to include clinical supervision, instructional leadership, and advanced pedagogical knowledge, and demonstrated competencies in the following areas: providing feedback on instructional episodes, engaging in reflective dialogue centered on classroom instructional management and/or experience, focused goal-setting and facilitation of individual and collective personal growth, understanding the observation cycle, and knowledge and expertise in data management platforms.

~~2)~~3) ~~Program shall include~~Complete ninety (90) supervised contact hours to include ~~a combination of face-to-face and field-based~~facilitation of both individual and group professional development activities ~~and evidence that knowledge gained and skills acquired are aligned with Idaho Teacher Leader Standards~~.

ii. Teacher Leader – Instructional Technology

1) Complete three (3) years of full-time certificated teaching experience while under contract in an accredited school setting.

2) Complete a state board approved program of at least twenty (20) post baccalaureate semester credit hours of study aligned to Idaho Teacher Leader Standards at an accredited college or university or a state board approved equivalent. Coursework to include technology integration and assessments, online education infrastructure and execution, instructional technology theory and foundations pedagogy, systems and performance evaluation, and applied project experiences.

3) Complete ninety (90) supervised contact hours to include facilitation of both individual and group professional development activities.

~~ii.~~iii. Teacher Leader – Literacy ~~– Eligibility for Endorsement. To be eligible for a~~

~~Teacher Leader – Literacy endorsement on the Standard Instructional Certificate, a candidate must have satisfied the following requirements:~~

1) Hold a literacy endorsement or meet the requirements of a literacy endorsement, and complete three (3) years~~'~~ of full-time certificated teaching experience while under contract in an accredited school setting.

2) ~~Provides verification of completion of~~Complete a state~~-~~ board approved program of at least twenty (20) post baccalaureate semester credit hours of study aligned to Idaho Teacher Leader Standards at an accredited college or university or a state~~-~~ board approved equivalent. Coursework to include foundational literacy concepts; fluency, vocabulary development, and comprehension; literacy assessment concepts; and writing process; all of which are centered on the following emphases: specialized knowledge of content and instructional methods; data driven decision making to inform instruction; research-based differentiation strategies; and culturally responsive pedagogy for diverse learners.

~~2)~~3) ~~Program shall include~~Complete ninety (90) supervised contact hours to include ~~a combination of face-to-face and field-based~~facilitation of both individual and group professional development activities ~~and evidence that knowledge gained and skills acquired are aligned with Idaho Teacher Leader Standards. The candidate must meet or exceed the state qualifying score on appropriate state approved literacy content assessment~~.

~~iii.~~iv. Teacher Leader – Mathematics ~~– Eligibility for Endorsement. To be eligible for a Teacher Leader – Mathematics endorsement on the Standard Instructional Certificate, a candidate must have satisfied the following requirements:~~

~~1) Education Requirements: Hold a Standard Instructional Certificate and have demonstrated content competencies. Coursework and content domains required include number and operation, geometry, algebraic reasoning, measurement and data analysis, and statistics and probability, which are centered on the following emphases: structural components of mathematics; modeling, justification, proof, and generalization; and specialized mathematical knowledge for teaching.~~

~~2)~~1) ~~Experience: Completion of a minimum of~~Hold a mathematics (6-12) or (5-9) endorsement and complete three (3) years~~'~~ of full-time certificated teaching experience while under contract in an accredited school setting.

2) ~~Provides verification of completion~~Complete ~~of~~ a state board ~~-~~ approved program of at least twenty (20) post baccalaureate semester credit hours of study aligned to Idaho Teacher Leader Standards at an accredited college or university or a state board~~-~~ approved equivalent. Coursework to include number and operation, geometry, algebraic reasoning, measurement and data analysis, and statistics and probability, all of which are centered on the following emphases: structural components of mathematics; modeling, justification, proof, and generalization; and specialized mathematical knowledge for teaching.

3) Program shall include ninety (90) supervised contact hours to include ~~a combination of face-to-face and field-based~~facilitation of both individual and group professional development activities ~~and evidence that knowledge gained and skills acquired are aligned with Idaho Teacher Leader Standards. The candidate must meet or exceed the state qualifying score on appropriate state approved math content assessment~~.

~~iv.~~v. Teacher Leader – Special Education ~~– Eligibility for Endorsement. To be eligible for a Teacher Leader – Special Education endorsement on the Standard Instructional Certificate, a candidate must have satisfied the following requirements:~~

~~1) Education Requirements: Hold a Standard Instructional Certificate endorsed Generalist K-12, K-8, or 5-9 and have demonstrated content competencies in the following areas: assessment of learning behaviors; individualization of instructional programs based on educational diagnosis; behavioral and/or classroom management techniques; program implementation and supervision; use of current methods, materials, and resources available and management and operation of special education management platforms; identification and utilization of community or agency resources and support services; counseling, guidance, and management of professional staff; and special education law, including case law.~~

~~2)~~

~~3)~~1) ~~Experience: Completion of a minimum of~~Hold an Exceptional Child Education endorsement or Blended Early Childhood Education/Early Childhood Special Education endorsement and complete three (3) years~~'~~ of full-time certificated teaching experience, at least two (2) years of which must be in a special education classroom setting, while under contract in an accredited school setting.

2) ~~Provides verification of completion of a~~Complete a state~~-~~ board approved program of at least twenty (20) post baccalaureate semester

credit hours of study aligned to Idaho Teacher Leader Standards at an accredited college or university or a state- board approved equivalent. Coursework to include assessment of learning behaviors; individualization of instructional programs based on educational diagnosis; behavioral and/or classroom management techniques; program implementation and supervision; use of current methods, materials, and resources available; management and operation of special education management platforms; identification and utilization of community or agency resources and support services; counseling, guidance, and management of professional staff, and special education law, including case law.

4)3) Program shall include ninety (90) supervised contact hours to include a combination of face-to-face and field-basedfacilitation of both individual and group professional development activities and evidence that knowledge gained and skills acquired are aligned with Idaho Teacher Leader Standards.

ll.qq. Teacher Librarian (K-12). Twenty (20) semester credit hours of coursework leading toward competency as defined by Idaho Standards for Teacher Librarians to include the following:coursework in collection development/ and materials selection;, literature for children and/or young adults;, organization of information to include cataloging and classification;, school library administration/ and management;, library information technologies;, information literacy;, and reference and information service.

mm.rr. Theater Theatre Arts (5-9 or 6-12). Twenty (20) semester credit hours leading toward competency as defined by Idaho Standards for Theater Arts Teacher, includingto include coursework in secondary methods of teaching theatre arts, each of the following areas: acting and directing, and a minimum of six (6) semester credits in technical theatertheatre/stagecraft. To obtain a Theater Arts (6-12) endorsement, applicants must complete a comprehensive methods course including the pedagogy of acting, directing and technical theater.

nn.ss. Visual Arts (5-9, 6-12, or K-12). Twenty (20) Semester semester credit hours leading toward competency as defined by Idaho Standards for Visual Arts Teachers to include a minimum of nine (9) coursework in methods of teaching secondary arts, 2-dimensional and 3-dimensional studio areas, six (6) semester credit hours in: foundation art and design., and three (3) credits in art history. Additional course work must include secondary arts methods, 2-dimensional and 3-dimensional studio areas. To obtain a Visual Arts (K-12) endorsement, applicants must complete an elementary arts methods courseswork.

oo. Visual Impairment (Pre-K-12). Completion of a program of a minimum of thirty (30) semester credit hours in the area of visual impairment. An institutional

~~recommendation specific to this endorsement is required. To be eligible for a Visually Impaired endorsement, a candidate must have satisfied the following requirements:~~

~~pp.~~tt. World Language (5-9, 6-12 or K-12). Twenty (20) semester credit hours to include ~~a minimum of~~coursework in methods of teaching language acquisition, twelve (12) intermediate or higher credits in a specific world language~~. Course work must include~~, and coursework in two (2) or more of the following areas: grammar, conversation, composition, culture, or literature~~; and course work in foreign language methods~~. To obtain an endorsement in a specific ~~foreign~~ world language (K-12), applicants must complete an elementary methods course. To obtain an endorsement in a specific ~~foreign~~ world language, applicants must complete the following:

i. Score an intermediate high (as defined by the American Council on the Teaching of Foreign Languages or equivalent) on an oral proficiency assessment conducted by an objective second party; and

ii. A qualifying score on a state board approved specific ~~foreign~~ world language content assessment, or if a specific ~~foreign~~ world language content assessment is not available, a qualifying score on a state board approved world language~~s~~ pedagogy assessment~~)~~.

SUBJECT

Idaho Dyslexia Handbook

REFERENCE

December 1998	Board approved the initial Idaho Comprehensive Literacy Plan.
August 2015	Board adopted the Literacy Implementation Committee's recommendations, including a recommendation to substantially revise the Idaho Comprehensive Literacy Plan pursuant to Section 33-1614, Idaho Code.
December 2015	Board adopted the 2015 Idaho Comprehensive Literacy Plan
February 2017	Board incorporated the Idaho Comprehensive Literacy Plan Educator Guide as an addendum to the 2015 Idaho Comprehensive Literacy Plan
December 2020	Board adopted the 2020 Idaho Comprehensive Literacy Plan
February 2022	Board supported Dyslexia legislation creating assessment and professional development requirements for educators working with students with characteristics of dyslexia (this legislation was amended prior to adoption, the legislation supported by the Board did not include reference to the dyslexia handbook). Board approved setting aside $100,000 of ARPA ESSER SEA Set Aside funding for contracting for the drafting of the Dyslexia Handbook in alignment with the Dyslexia Work Group's recommendations.

APPLICABLE STATUTE, RULE, OR POLICY

Section 33-1811, Idaho Code

BACKGROUND/DISCUSSION

In December 2020, when the Board approved the updated Idaho Comprehensive Literacy Plan, the group that completed the work recommended that a separate work group be formed to develop a resource focused on providing systematic, explicit instruction and support to students with characteristics of dyslexia. In October 2021, the Idaho Dyslexia Handbook Work Group (the Work Group) was established.

The Work Group has included twelve (12) individuals from across Idaho, including representation from the State Board of Education, State Department of Education, K-12 education, higher education, special education and dyslexia experts, and parent advocates. Additionally, Dr. Louisa Moats, a recognized literacy expert and author, originally acted as a consultant to the group and was

later contracted to be the primary writer of the Idaho Dyslexia Handbook (the Handbook). To complete the Handbook, the Work Group held twelve (12) meetings and regularly completed tasks in between. The Work Group has collaborated with Dr. Moats, providing substantial feedback about drafts and ensuring that the Handbook is aligned to practices and procedures used in Idaho. Board staff have provided support in formatting and copyediting the Handbook.

The Idaho Dyslexia Handbook is, first and foremost, a resource for educators. It is designed to clarify what dyslexia is and is not, and to guide educators in identifying students with dyslexia and providing them with targeted supports. The Handbook is also appropriate for other audiences, including parents and the general public, as it provides information essential to understand dyslexia and resources specifically geared to parents. The Handbook includes a glossary, links to external resources, and key appendices. Appendix A of the Handbook is designed to support educators in implementing the requirements for Tier I screening and Tier II diagnostic measures, as required by state statute.

In addition to voting to submit the Handbook to the Board for consideration and adoption, the Work Group voted to recommend that the Board place the Dyslexia Handbook on a specific review and update schedule to follow the updating of the Idaho Comprehensive Literacy Plan, on a five-year cycle.

IMPACT

Approval of the Idaho Dyslexia Handbook will act as formal adoption by the Board and will allow for distribution.

ATTACHMENTS

Attachment 1 – Idaho Dyslexia Handbook, December 2022

STAFF COMMENTS AND RECOMMENDATIONS

Section 33-1811, Idaho Code, was enacted by the 2022 Idaho Legislature. At the time it was enacted the Board had approved the Idaho Comprehensive Literacy Plan, however, drafting of the Dyslexia Handbook had not started.

Pursuant to Section 33-1811, Idaho Code, the Idaho Comprehensive Literacy Plan and the “state dyslexia handbook” are the required reference documents for guidance on addressing the needs of students with dyslexia. Applicable professional development and LEA interventions (including curricular materials) must be aligned to the plan. Further, this section of Code outlines requirements for screening and administering diagnostic measures to students. The Idaho Dyslexia Handbook presented by the Work Group addresses all of these areas of content and is a research-based guide for educators.

Staff recommends approval and supports the Work Group’s recommendation to place the Handbook on a five-year review and update cycle.

BOARD ACTION

I move to approve the Idaho Dyslexia Handbook as submitted in Attachment 1 and include it in the review and update cycle with the Comprehensive Literacy Plan.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

Idaho Dyslexia Handbook

Kindergarten through 12th Grade

December 2022

Idaho State Board of Education

P.O. BOX 83720, BOISE, ID 83720-0037
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Dyslexia Handbook cover design provided in-kind by James Taylor, Meticular

Table of Contents

Section 1: Introduction 1
1.1 Overview of Purpose 2
1.2 Alignment to the Idaho Comprehensive Literacy Plan 3

Section 2: Defining and Recognizing Dyslexia 5
2.1 Defining Dyslexia 6
2.2 Other Attributes of Dyslexia Established by Research 7
2.3 Reading and the Brain 9
2.4 How Symptoms of Dyslexia Change and Evolve with Development 10
2.5 Correcting Common Misconceptions About Dyslexia 12
2.6 Subtypes of Dyslexia 13
2.7 Reading Problems that are Not Dyslexia 14

Section 3: Structured Literacy Interventions 16
3.1 Systematic Interventions are Critical for Students with Dyslexia 17
3.2 The Content of Structured Literacy 18
3.3 Key Elements of a Structured Literacy Lesson Designed to Accelerate Progress 26
3.4 Intensity of Instruction 30
3.5 Teaching Principles: Explicit, Systematic, and Multi-Sensory 31

Section 4: Screening and Testing for Dyslexia 33
4.1 Overview of the Screening, Intervention, and Progress Monitoring Process 34
4.2 Tier I Screening Using the Idaho Reading Indicator (IRI) 34
4.3 Tier II Diagnostic Measures to Inform Instruction 35
4.4 Analyzing the Data: Qualitative Indicators 36
4.5 Progress Monitoring 38
4.6 Comprehensive Evaluation for Special Education Eligibility 39

Section 5: Role of Assistive Technology, Modifications & Accommodations 42
5.1 Assistive Technology 43
5.2 Task Modifications 43
5.3 Accommodations 44

Section 6: Guidelines for Program Selection 45
6.1 Considerations for Choosing Materials for Instruction and Intervention 46
6.2 Recommended Programs and Resources 48

Section 7: Professional Development and Teacher Support 50
7.1 The Necessity of Dyslexia Training for All Teachers 51
7.2 Idaho Statutory Requirements and State Resources 51
7.3 Other Teacher Support Resources 52

Section 8: Information & Resources for Parents 53
8.1 The Impact of Parents 54
8.2 Other Sources of Information for Parents 54

Section 9: Postscript 56

Glossary 58

References 62

Resources 67

Appendices 68

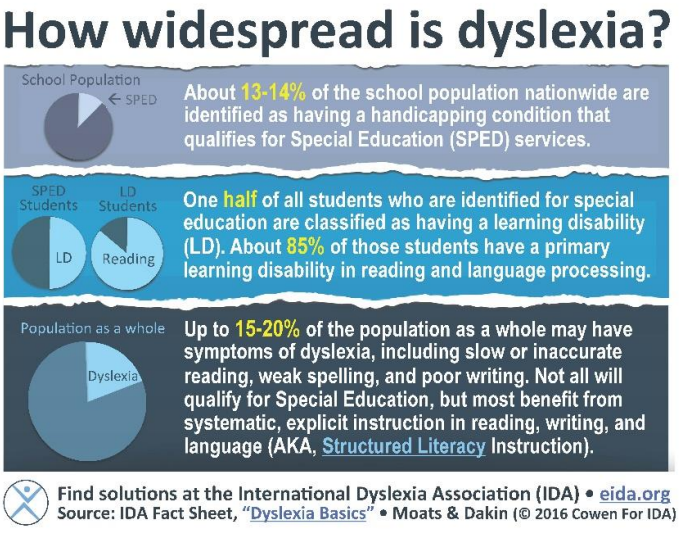
SECTION 1:

INTRODUCTION

Reading and reading difficulties are probably the most studied aspect of human psychology, and in the last few years, a solid consensus has developed around some key questions: How do children learn to read? What goes wrong when they struggle? What can we do about the problems? Informative research includes tens of thousands of scientifically conducted studies, analyses of studies, overview papers, and textbooks. This body of work, known as the "science of reading," is the basis for the guidance in the Idaho Comprehensive Literacy Plan (ICLP) and in this Dyslexia Handbook. Studies have shown that almost all children, even those with dyslexia, can learn to read – the essential first mission of schooling.

1.1 OVERVIEW OF PURPOSE

The purpose of this resource is to help educators, parents, state leaders, and the public to understand what dyslexia is, how it should be treated, and how to improve literacy outcomes for all students. In the spring of 2022, 28.7% of third grade students were not proficient on the state's early reading assessment, the Idaho Reading Indicator (IRI). On the state's more rigorous and comprehensive Idaho Standards Achievement Test in Language Arts (ISAT) administered in spring of 2022, about half were at basic or below basic at the end of third grade. The ISAT test requires students to read longer, more complex passages, answer questions related to research, and complete a writing task. This data reveals that the state has additional work to do to improve core literacy instruction.



Nationally, as much as 13-14% of all students are identified under special education guidelines. Students with specific learning disabilities (SLD) typically represent approximately 50% of students in special education.[1] While over 19% of Idaho's special education students are identified as SLD, fewer than 3% of all students have been so identified.[2] Nevertheless, up to 20% of all students have some characteristics of dyslexia.[3] In Idaho, even fewer are identified as having specific learning disabilities, so the needs of most students with milder symptoms of dyslexia are likely to be addressed outside of special education guidelines. All educators must know about and be prepared to teach students with dyslexia.

[1] Cowen, 2016
[2] Idaho State Department of Education, 2022
[3] Wagner et al., 2020

While all reading difficulties are not the same and not all students who struggle are dyslexic, we can improve results for all students by implementing science-driven reading and language instruction in the regular classroom and in intervention settings. This instruction is delivered beginning in kindergarten so that the number of students who fall behind in the first place will be minimized and their problems will be less serious. The goal of minimizing reading difficulties is accomplished by screening all students when they enter a grade, identifying those who are not on track, and supplementing classroom instruction with evidence-based interventions that targets students' specific needs. Intervention can range from short term and less intensive to long term and very intensive. Determination of students' needs through strategic assessment, assignment of students to skills-based small groups, and careful monitoring of their progress, is the main goal. A school organization framework that makes sure children do not "fall through the cracks" is called a Multi-Tiered System of Support (MTSS). Idaho uses this tiered approach to identify students who are struggling with foundational reading skills and who need intervention.

Even though all students who are at risk should be assigned to intervention proactively, regardless of the cause of their difficulties, identification of dyslexia and educated use of the term is important for several reasons:

- First, there are many resources and much information to be accessed that will help parents, teachers, and students understand what the student is experiencing and why. Insight into the disorder and naming it is often a psychological relief to all involved.
- Second, there is a large community of children and people who experience the challenges of dyslexia, and it is important for students and families to know they are not alone.
- Third, attributing a reading and spelling difficulty to dyslexia may help individuals and their families understand that they are capable in other ways and that they are likely to succeed in life.
- Fourth, individuals with severe and complex problems have rights and protections if they are determined to have disabilities (called a handicapping condition under federal law). This information is elaborated in Section 4.

1.2 ALIGNMENT WITH THE IDAHO COMPREHENSIVE LITERACY PLAN

The information in this Handbook extends and elaborates information already in the Idaho Comprehensive Literacy Plan (ICLP), as updated in December 2020. This Handbook invokes more references and scientific research specific to dyslexia and other learning difficulties, but the essential content and practices of instruction in both the regular classroom and the intervention setting should be aligned.

The ICLP calls for teachers to "have the ability to implement systematic, explicit instruction in word recognition and language comprehension (as shown in the Simple View of Reading and Scarborough's Rope in *Section II: Developing Literacy*)." The content of explicit, structured language lessons, as elaborated in both the ICLP and this document, will include phonemic awareness, phonics for reading and spelling, word and passage reading fluency, vocabulary and

comprehension, plus oral language and written expression. Beyond this content, there is no additional magic or mystery to teaching students with dyslexia. They usually improve with carefully designed, deliberate, step-by-step practice with essential language-based skills in lessons taught by a trained person.

Both the ICLP and this Handbook stress the importance of early intervention. With skilled and sustained effort on the part of teachers and students, achievement gaps can be narrowed significantly,[4] especially with early screening and intervention that begins in kindergarten.

The ICLP and this Handbook refer to The International Dyslexia Association (IDA)'s Knowledge and Practice Standards for Teachers of Reading. In addition, Idaho has updated its Comprehensive Literacy Standards for Educator Preparation (which are included in the Standards for Initial Certification). These standards outline what teachers must know and do to implement effective reading instruction that will prevent and reduce reading difficulties. When the IDA Standards and the Idaho Standards are compared to typical classroom practices,[5] it is clear the teaching profession still has work to do to turn away from ineffective ideas and practices of the past – even though they may be popular – and replace them with the deep knowledge required for professional expertise. Both teacher preparation programs and professional development efforts will be needed to ensure that licensed teachers are able to meet those standards.

[4] Torgesen, 2004a
[5] EdWeek Research Center, 2020

SECTION 2:

DEFINING & RECOGNIZING DYSLEXIA

2.1 DEFINING DYSLEXIA

The term *dyslexia,* most simply, is a descriptive label for a word reading and spelling problem that originates with specific language processes, most often those involving the brain's system for identifying, remembering, thinking about, and manipulating elements of speech (phonemes). These terms are used in the formal definition of Idaho law, which in turn echoes most of the provisions of the definition adopted by the International Dyslexia Association.

2.1.1 Definitions and Differences

Idaho Statute, Section 33-1802, as amended in 2022, defines dyslexia as follows:

> "Dyslexia means a specific learning challenge that is neurological in origin. It is characterized by difficulties with accurate or fluent, or both, word recognition and by poor spelling and decoding abilities, which typically result from a deficit in the phonological component of language that is often unexpected in relation to other cognitive abilities and the provision of effective classroom instruction."

The definition of dyslexia adopted by the Board of Directors of the International Dyslexia Association (IDA) in 2002,[6] is slightly different and states that:

> "Dyslexia is a specific learning disability that is neurobiological in origin. It is characterized by difficulties with accurate and/or fluent word recognition and by poor spelling and decoding abilities. These difficulties typically result from a deficit in the phonological component of language that is often unexpected in relation to other cognitive abilities and the provision of effective classroom instruction. Secondary consequences may include problems in reading comprehension and reduced reading experience that can impede growth of vocabulary and background knowledge."

Key Differences in the Definitions

Idaho law recognizes that dyslexia may occur in children who do not qualify for special education services under the category Specific Learning Disabilities but who nevertheless require preventive and remedial structured literacy instruction. Thus, the term "learning challenge" is used rather than "specific learning disability." The IDA definition recognizes that dyslexia often has secondary consequences; when an individual has trouble reading the words, they read less, and thus may have less exposure to the vocabulary, background knowledge, and language found in books. Although dyslexia primarily affects word recognition, students' reading comprehension may suffer because they are inaccurate, slow, and lack reading experience. In addition, they may also have trouble with aspects of language comprehension, beyond the basic word reading problem.

[6] Lyon, Shaywitz & Shaywitz, 2003

2.1.2 Explanation of Important Terms in Idaho Statutory Definition

A. "Neurological in origin" – People with dyslexia have been shown to have differences in the development, organization, structure, and functioning of the very specific brain systems necessary for reading. While the neurological origin of dyslexia in an individual is presumed, it is not necessary to require medical assessments including neurological, neuropsychological, or neuroimaging to identify dyslexia. Additional information is provided in section 2.3.

B. "Accurate or fluent, or both, word recognition and by poor spelling and decoding abilities" – The inclusion of fluency (speed of word recognition), spelling and decoding in this definition captures the difficulties experienced by many older students with dyslexia who may eventually become accurate word readers but continue to be very slow readers and poor spellers.

C. "Typically result from a deficit in the phonological component of language" -- The core language difficulty in dyslexia resides within the phonological processing system of the brain, which supports the ability to recognize individual speech sounds in spoken words efficiently and accurately, and then to associate those sounds with letter symbols used for reading and spelling. Phonological processing difficulties are expressed in other ways as well, including problems remembering and repeating new words or confusing words that sound alike.

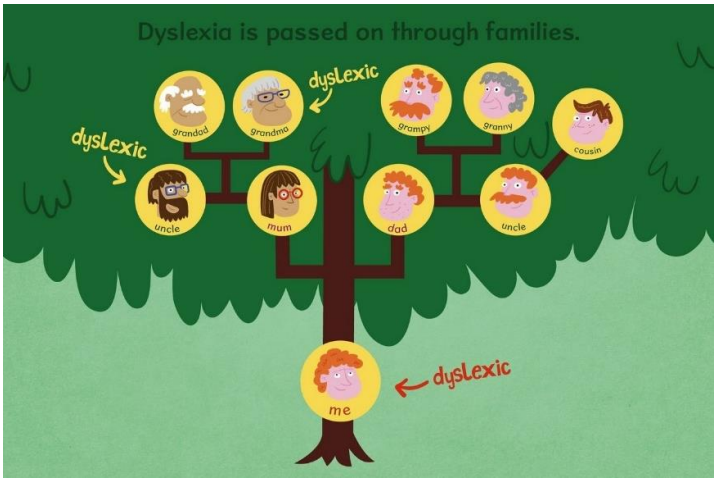
D. "That is often unexpected in relation to other cognitive abilities and the provision of effective classroom instruction" – Dyslexia occurs throughout the range of cognitive and intellectual abilities. In order to be identified, a student must have had a reasonable opportunity to learn through effective instruction that has been successful for most students. The term "unexpected" means that the student may struggle inordinately, demonstrate unusual confusions, and/or have prominent difficulties associating and remembering written symbols, while at the same time being able to learn other subject matter in and outside of school with relatively more ease.

2.2 OTHER ATTRIBUTES OF DYSLEXIA ESTABLISHED BY RESEARCH

- Dyslexia often runs in families. Geneticists have found several genes associated with a higher risk of developing dyslexia. Students with a parent or sibling with a reading disability have about a 50% greater chance of also having a reading disability than students whose families do not have that history[7]. Higher genetic risk, as with many aspects of human development, does not necessarily mean that the student will experience a reading and spelling disability.

[7] Elliott & Grigorenko, 2014

It does mean that if a family reports a history of dyslexia, school personnel should watch the child's response to instruction carefully and intervene proactively if symptoms begin to develop. In all cases, early and proactive intervention has the greatest chance of being effective in reducing the impact of the disorder.[8]



- Dyslexia often occurs with other learning and behavioral disorders. Dyslexia may co-occur with problems in language (Specific Language Impairment), speech (Specific Speech Disorder), attention (Attention Deficit Hyperactivity Disorder), math calculation (Dyscalculia), and the motor skills necessary for writing (Dysgraphia). When more than one developmental disorder occurs in the same child, the conditions are said to be comorbid.

- Students with dyslexia often experience higher levels of anxiety, frustration, and depression than students who learn to read without such difficulty. Emotional support, counseling, and relief from excessive stress and frustration may be needed in treatment plans for students.

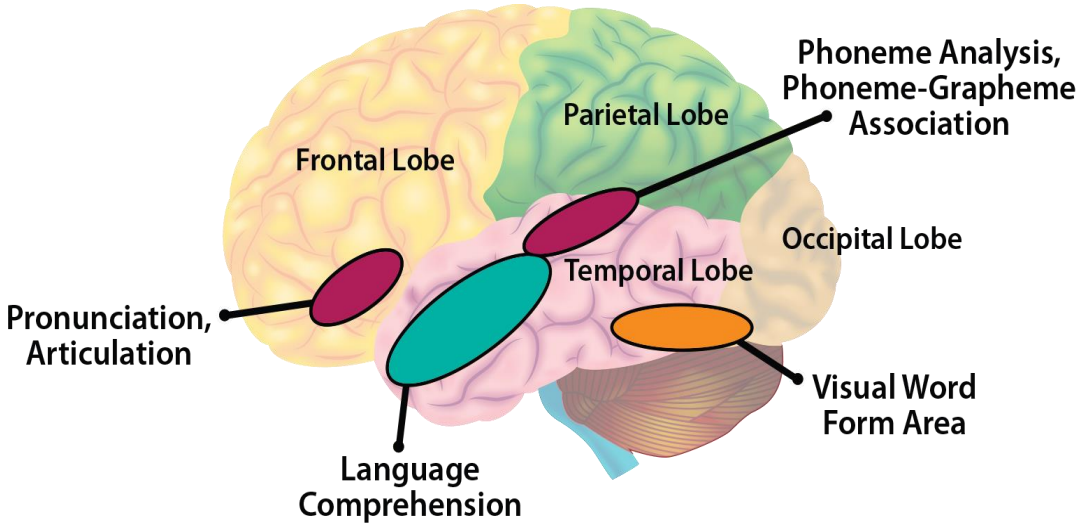
- Dyslexia occurs through the range of intellectual ability. Although dyslexia by definition is "unexpected" because the student has an easier time with some aspects of learning, the condition is *not* caused by lack of intellectual ability and is *not* defined by a wide difference between an IQ test score and a score on a reading test. Students in the low average range of intellectual ability can also experience dyslexia.

- Dyslexia is a life-long condition. A person with dyslexia can overcome the most limiting aspects of the problem – with appropriate instruction -- and learn to read. However, the condition itself remains part of the individual's biological make-up. The symptoms and challenges facing the dyslexic person change over time. It is important for parents and teachers who are planning an individual's support to anticipate the shifting nature of dyslexia as students make their way through schooling and life.

[8] Nessy, n.d.

2.3 READING AND THE BRAIN

The illustration below of the left hemisphere of the human brain[9] depicts the major language systems that must be developed and connected to support fluent reading. The neural systems and pathways necessary to enable reading are not already wired into the developing human brain like those that support the development of spoken language. Rather, those systems and connecting pathways must be constructed from explicit instruction, practice and reading experience. When the brain learns to read, it recruits, adapts, and creates neural pathways to support this unnatural, acquired skill called reading.



When the eye looks at print, the images are carried to the occipital lobe where the shapes of the letter forms and letter patterns can be recognized. A lower region of the occipital-temporal area, known as the brain's letter box or visual word form area, over time becomes the place where images of known printed words are stored in memory. However, the learning and storage of familiar printed words occurs *after* and *as a consequence of* the printed letters being associated with speech sounds (phonemes and syllables). Recognition, pronunciation and articulation of speech sounds, necessary for developing phoneme awareness, depend on activity in the frontal lobe, which is anatomically distant from the visual word form area. The sounds of spoken language must be connected to the images of letters and letter combinations (graphemes) for words to be recognized. This critical association process takes place in the parietal-temporal area, also known as the angular gyrus. Linking of phonemes (sounds) and graphemes (letters) is necessary for words to become "sight" words or instantly recognized words. Associations between speech and print occur as the brain constructs an information highway (white matter pathway) linking the back and the front of the brain. Once a word in print is associated with phonemes and syllables in speech and is pronounced, association to its meaning is quickly triggered.

[9] Moats & Tolman, 2019, LETRS (Lexia Learning), based on Dehaene, 2009, and Fletcher et al., 2019.

Students with dyslexia, as a group, show much less activation in the angular gyrus area where phonemes and graphemes become linked, and consequently, less activation in the visual word form area because they have not developed automatic recognition of many words. However, with intensive remediation, activation patterns in those critical areas can become normalized in many students with dyslexia.[10]

2.4 HOW SYMPTOMS OF DYSLEXIA CHANGE AND EVOLVE WITH DEVELOPMENT

The following lists of "typical" symptoms of dyslexia or word level reading problems at each grade level are given as a guide, with the caution that an individual may have some but not all of these indicators.

Preschool: Getting Ready to Read

- Is late in learning to talk.
- Is slow to learn new words.
- Mixes up pronunciations of words much more or much longer than other children (e.g., says *aminal* for animal, *pusgetti* for spaghetti) even after multiple corrections.
- Has persistent trouble producing difficult speech sounds, such as /th/, /r/, /l/, and /w/.
- May not enjoy looking at or following print in books when read aloud.

Kindergarten and First Grade: Beginning Reading Instruction

- Exhibits difficulty remembering names of letters and recalling them quickly.
- Struggles to recall sounds that letters represent.
- Has trouble breaking a simple word such as zoo or cheese into its separate speech sounds (i.e., /z/ /ū/; /ch/ /ē/ /z/).
- Is slow to developing automatic recognition of some common words (e.g., family names, common labels, the most common words used in writing).
- Does not spell the sounds of words in a way that allows the reader to recognize the words.

Second and Third Grade

- Is unable to recognize important and common words by sight, or instantly, without having to laboriously sound them out.
- Falters during the sounding out or letter-sound association (decoding) process and recalls the wrong sounds for the letters and letter patterns.

[10] Fletcher et al., 2019; Simos et al., 2002

- Is a poor speller, with speech sounds omitted, wrong letters for sounds used, and poor recall for even the most common "little" words (e.g., when, went, they, their, been, to, does, said, what).
- Reads too slowly and lacks appropriate expression, marked by many decoding or word recognition errors.
- Loses the gist or meaning of the passage when reading is slow and/or inaccurate.
- Guesses at unknown words from pictures, story theme, or one or two letters in a word.
- Has inordinate difficulty with writing or completing written work.

Transition to "Reading to Learn"

- Is easily overwhelmed by reading and writing demands.
- Misreads directions or word problems.
- Struggles to keep up, taking unfinished classwork home in addition to regular homework.
- Remains a poor speller and struggles to produce written work

Intermediate Grades (Fourth to Sixth Grade)

- Needs extra time on timed oral and silent reading tests.
- Will typically do poorly when asked to read lists of single, common words that are taken out of the context.
- Spelling remains poor.
- Appears to have a comprehension problem on a reading test, but when comprehension is measured through tests that do not require reading, it is often much better than the reading test would suggest.

Middle School and Beyond

- May avoid reading and writing as much as possible and report feeling distressed by the effort of reading.
- Reads slowly, fatigues easily, and has trouble managing reading assignments.
- May continue to misread words, especially longer and unfamiliar names.
- Struggles to produce written assignments.
- Spells poorly.
- Usually needs organizational and study strategies and assistive technology to manage classwork, test taking, and homework.

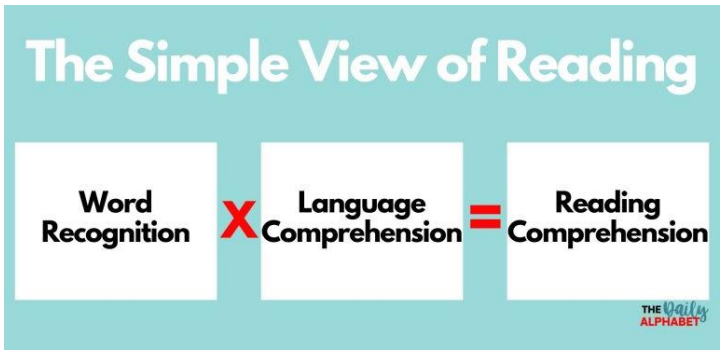
2.5 CORRECTING COMMON MISCONCEPTIONS ABOUT DYSLEXIA

Table 1: Dyslexia – Myth vs. Fact

Misconception or Myth	Fact
Dyslexia is a rare disorder.	Between 5% and 10% of all students are estimated to have severe dyslexia that requires intensive and expert instruction, and up to 20% are estimated to have some of the symptoms of dyslexia.
The main symptom of dyslexia is making reversals or seeing things backwards.	Letter reversals, writing words backwards, and sequencing problems are not the hallmarks of this condition. Initial confusions about the direction or sequence of letters in words are typical of many beginning readers. When and if these problems persist, they are the result of a language-based problem associating speech and language with printed symbols.
Dyslexia is a problem with vision, visual-spatial reasoning, and/or visual memory for words.	Learning to identify letter shapes and letter sequences is more closely associated with language abilities than visual abilities. There is no research evidence to support vision therapies or visual-spatial therapies in the treatment of dyslexia.[11] There is no evidence that colored overlays on print or colored lenses in glasses will help students learn to read, although some students may experience relief from eye strain with these aids.[12]
Boys are much more likely to be dyslexic than girls.	The prevalence rates of dyslexia in boys and girls are only slightly different. Boys are affected somewhat more often, but the ratio is about 1.4 to 1.[13] Some studies suggest that schools and clinics tend to identify boys more frequently than girls, but that may be because they are more likely to have attention and behavior problems.
Dyslexia is a "gift" and people with dyslexia are unusually creative, artistic, and entrepreneurial.	It is not true that dyslexia is associated with giftedness.[14] All individuals, including those with dyslexia, may have relative strengths or relative weaknesses in art, social leadership, athletics, and everything else. However, for the student with dyslexia, developing strengths and interests beyond academic learning is a very important way to build confidence, competence, a sense of belonging, and future paths to success in life.

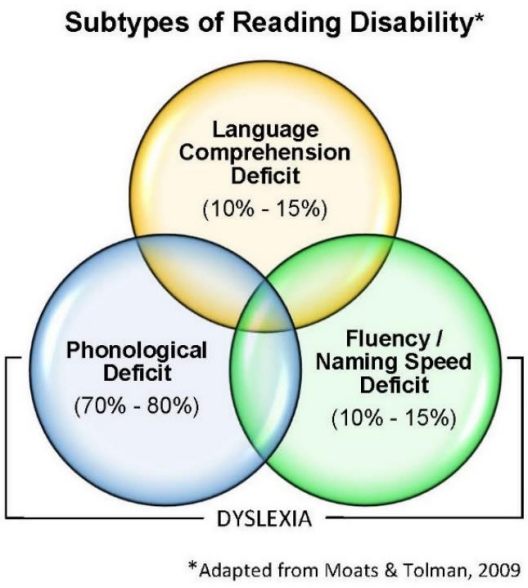
[11] American Academy of Ophthalmology, 2014
[12] Kilpatrick, 2015
[13] Fletcher et al., 2019; Elliott & Grigorenko, 2014
[14] Elliott & Grigorenko, 2014; Seidenberg, 2017

2.6 SUBTYPES OF DYSLEXIA



The "Simple View of Reading," a theoretical framework that is described in the ICLP, states that reading comprehension depends on the product of competence in two skill domains: word recognition and language comprehension.[15] Word recognition is the ability to read individual printed words accurately and fluently, out of context. Language comprehension is the ability to understand the words, sentences, and overall intended meanings of language that is spoken or read aloud.

Reading difficulties can arise in both areas or in one of them. Among all English-speaking students in the lowest 25% of reading ability, at least 80% have trouble with accurate and fluent word recognition that originates with weaknesses in phonological processing or the ability to analyze and mentally manipulate the segments of speech.[16] Students with dyslexia are in this group. However, as stated previously, word recognition difficulties often co-occur with fluency and comprehension problems. Therefore, intervention programs may need to address both word reading and language comprehension.



It is important to recognize that not all students with dyslexia are alike and there is no standard or "classic" diagnostic profile for dyslexia beyond the core problem with word recognition and spelling.[17] Although the majority will be weak on tests of phoneme awareness, not all will. Some students have a more prominent problem establishing automatic or fluent word recognition ("sight" word recognition) than learning to recognize speech sounds in spoken words. Those students often score low on measures of Rapid Automatic Naming (RAN). These students sound out words even after seeing them many times and tend to spell phonetically but not accurately. This subgroup generally has milder difficulties with reading than students with more serious impairments of phonological processing.[18]

[15] Hoover & Tunmer, 2020; Image: Griffith, n.d.
[16] Dehaene, 2009; Fletcher et al., 2019
[17] Fletcher et al., 2019; Spear-Swerling, 2015
[18] Dehaene, 2009; Elliott & Grigorenko, 2014

2.7 READING PROBLEMS THAT ARE NOT DYSLEXIA

Genetic, environmental, and instructional factors all contribute to the growth of reading skill. Some children come to school without the kind of experiences that support the development of literacy. Some students have general cognitive and learning difficulties across all areas. An increasing number of students are learning English as a second language. Some children fall behind, even though they are capable of learning, simply because their instruction has been insufficient and/or they have not regularly attended school.

About 10–15 percent of all poor readers appear to decode and read individual words better than they can comprehend the meanings of passages.[19] These poor readers are distinguished from students with dyslexia because they can read words accurately and quickly and they can spell. Their problems are linked with difficulties in social reasoning, abstract verbal reasoning (including inference-making), and/or general language comprehension. In addition, some students on the autism spectrum and some students with specific language impairment are in this subgroup. English Learners (ELs) with reading problems often appear to fit this profile of better word reading than reading comprehension because they have yet to build their knowledge of vocabulary and academic language. Table 1 summarizes the main types of reading problems.

Table 2: Main Profiles of Struggling Readers

Category	Characteristics	Likely Emphasis of Instruction
Specific word recognition and spelling difficulties • With weak phoneme awareness, and/or • With dysfluency – very slow and non-automatic	-Word reading inaccurate and/or slow, real and nonsense words -Spelling very problematic -Oral language comprehension a strength	-phoneme awareness -phonics and decoding -spelling and written expression -establishing automatic word reading and building fluency
Specific language and reading comprehension difficulties	-word recognition and phonics a relative strength -low vocabulary -weakness understanding sentences, text structure, pragmatics, making inferences	-listening comprehension focused on understanding and producing words, sentences, retelling, summaries -teacher-led, guided reading that supports making inferences, improving self-monitoring, using strategies to understand

[19] Fletcher et al., 2019; Oakhill, Cain, & Elbro, 2015

Category	Characteristics	Likely Emphasis of Instruction
Mixed reading difficulties	-both domains (WR and LC) are challenging -fluency will be reduced because of those weaknesses -spelling and written composition probably the most challenging	-a comprehensive approach that systematically addresses all aspects of oral and written language
Lack of opportunity to learn…	-should respond steadily to appropriate instruction	-supportive intervention with comprehensive approach

Distinguishing the cause of a reading or writing problem is not always simple or straightforward. We should not delay instruction if we are unsure of the origin of a student's difficulties or the proper classification of the problem. We should develop a working hypothesis about the cause (e.g., whether it is primarily a learning disability like dyslexia, primarily an environmentally caused problem, or something else), but the most productive course of action when we find a student who is at risk is to teach them. Often, in the process of observing the student's response to instruction, we can refine our hypothesis, but we should not delay intervention until we have a definitive identification or diagnosis. Early intervention is extremely important.[20]

[20] Fletcher et al., 2019; National Reading Panel, 2000

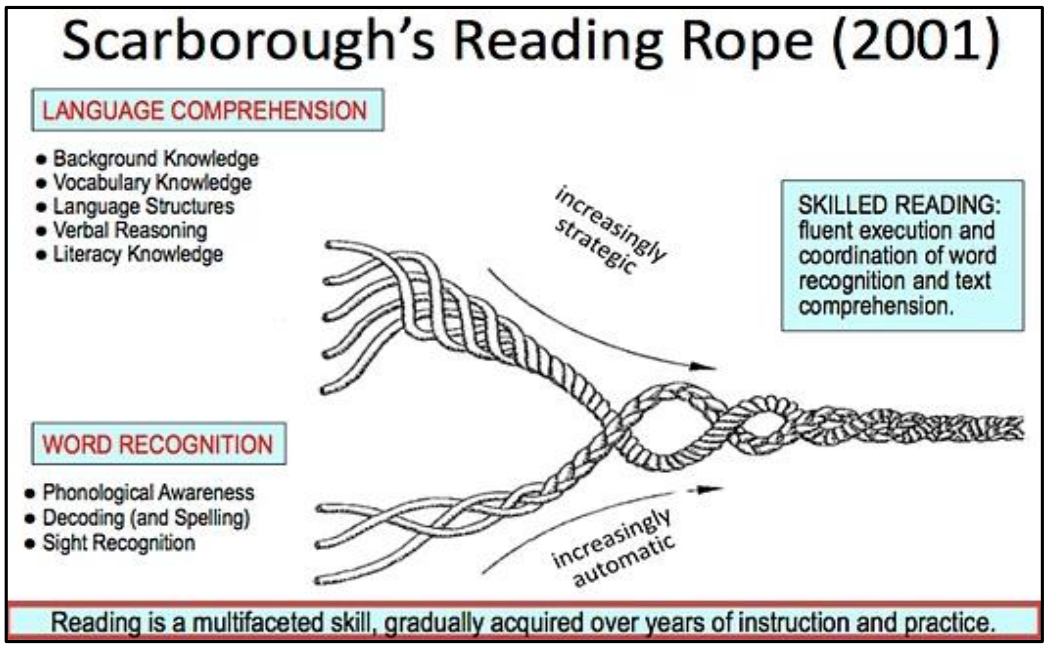
SECTION 3:

STRUCTURED LITERACY INTERVENTIONS

3.1 SYSTEMATIC INTERVENTIONS ARE CRITICAL FOR STUDENTS WITH DYSLEXIA

The importance of explicitly teaching foundational reading skills to all students in the regular classroom has been established by meta-analyses and expert reviews over several decades.[21] As students learn to read the words, their language arts curriculums also must build background knowledge, vocabulary, and familiarity with the language and forms of challenging text.

Students with dyslexia, however, must be systematically – and sometimes painstakingly -- taught how to read the words and how to spell. As the Reading Rope image below shows,[22] the critical strands of instruction that enable such students to accelerate their progress are a) phoneme awareness, b) phonics and decoding skills and c) building memory for "sight" words. "Sight" words are not just irregular words; they are all words that are automatically and efficiently recognized.



This section discusses what the students should be taught and how the instruction is enhanced within a systematic, explicit, multi-sensory approach.

[21] Adams, 1990; Foorman et al., 2016; National Reading Panel, 2000; Petscher et al., 2020
[22] Scarborough, 2001

3.2 THE CONTENT OF STRUCTURED LITERACY

Intervention for students with reading difficulties, especially those with dyslexia, builds knowledge of the elements of language that are represented in the English writing system (or any other language system being taught). This content includes the following.

- The phoneme system, including vowel and consonant speech sounds.

  A **phoneme** is the smallest element of speech from which words in a language are built. English has 15-18 vowel sounds and 25 consonant sounds. Some of these are not represented by single letters. Some have no unique spellings. Some are easily confused with others because they are very similar (/f/, /v/; /m/ /n/ /ng/; /s/ /z/, etc.). Before being asked to match a grapheme or spelling to a sound, the student should identify, remember, and pronounce the sound. Instruction should call attention to how phonemes are articulated as well as how they sound to the ear, and give students practice discriminating sounds that are confusable. Table 2 shows the consonant phonemes and Figure 1 shows the vowel phonemes. Phonemes are written between slashes.

Table 3: The Consonant Phonemes of English, by Place and Manner of Articulation [23]

	Bilabial (Lips Together)	**Labiodental (Teeth on Lip)**	**Interdental (Tongue between Teeth)**	**Alveolar (Tongue on Ridge behind Teeth)**	**Palatal (Tongue Pulled Back on Roof of Mouth)**	**Velar (Back of Mouth)**	**Glottal (In the throat)**
Stops Unvoiced Voiced	 /p/ /b/			 /t/ /d/		 /k/ /g/	
Nasals	/m/			/n/		/ng/	
Fricatives Unvoiced Voiced		 /f/ /v/	 /th/ /<u>th</u>/	 /s/ /z/	 /sh/ /zh/		 /h/
Affricates Unvoiced Voiced					 /ch/ /j/		
Glides Unvoiced Voiced	 /wh/ /w/				 /y/		
Liquids				/l/	/r/		

[23] Moats, 2020

Figure 2: The Vowel Sounds of English, by Order of Articulation[24]

Front, High (Smiley) **Back, High**

/ē/ (equal) /y//ū/ (unicorn)
/ĭ/ (itch) [ə] (banana) /ū/ (moon)
/ā/ (apron) /o͝o/ (book)
/ĕ/ (edge) /ō/ (open) **(Rounded)**
/ă/ (apple) /aw/ (saw)
/ī/ (ice) /ŭ/ (up)
/ŏ/ (octopus)

Middle / Low
(Open)

/er/ (bird)
/oi/ (boy) /ar/ (star)
/ow/ (cow) /or/ (door)

- The alphabet and how letters are formed.

  The 26 letters of the Roman alphabet, both upper and lower case, must be visually recognized, matched, and produced by hand. Knowing the alphabet in order will be essential for alphabetizing. A plain, consistent font for learning will be helpful to beginning students, as some letters (a, g, q) vary widely in appearance in print.

- Phoneme-grapheme (letter-sound and sound-letter) correspondences.

  A **grapheme** is a letter or letter combination that represents a phoneme. Some graphemes are single letters, but many graphemes in English are letter combinations (e.g., th, ch, oa, igh, eigh). About 75-80 common phoneme-grapheme correspondences are usually taught explicitly in a structured literacy program, over several years. Tables 3 and 4 list the types of graphemes that English uses for its consonant and vowel phonemes and that can be explicitly taught.

[24] Moats, 2020

Table 4: Types of Consonant Graphemes in English		
Consonant Grapheme Type	**Definition**	**Examples**
Single letters	A single consonant letter represents a single consonant phoneme.	b, d, f, g, h, j, k, l, m, n, p, r, s, t, v, w, y, z
Doublets	A double letter that represents one phoneme.	ff, ll, ss, zz
Digraphs	A two (di) letter combination that stands for one phoneme; no letter acts alone to represent the sound.	th, sh, ch, wh ph, ng (sing) gh (cough) [ck is a guest in this category]
Trigraphs	A three (tri) letter combination that stands for one phoneme; no letter acts alone to represent the sound.	-tch -dge
Consonants in blends	A blend contains two or three graphemes because the consonant sounds are separate and identifiable. A blend is not "one sound."	s-c-r (scrape) th-r (thrush) c-l (clean) f-t (sift) l-k (milk) s-t (most) *and many more*
Silent letter combinations	One or more letters that do not represent the phoneme are combined with a letter that does represent the phoneme. Most of these are from Anglo-Saxon or Greek.	*kn* (*knock*), *wr* (*wrestle*), *gn* (*gnarl*), *ps* (*psychology*), *rh* (*rhythm*), *-lm* (*palm*), *-lk* (*folk*), *-mn* (*hymn*), *-st* (*listen*)
Odd letter X	X is the only letter that stands for two phonemes, /k/ and /s/, and occasionally, /g/ and /z/.	box, exit exact, exist
Combination qu	These two letters, always together, stand for two sounds, /k/ /w/. They do not stand for "one sound."	quickly

Table 5: Types of Vowel Graphemes Used in English		
Vowel Grapheme Type	**Definition**	**Example**
Single letters	A single vowel letter stands for a vowel sound.	(short vowels) cap, hit, gem, clod, muss (long vowels) me, no, music
Vowel teams	A combination of two, three, or four letters stands for a vowel.	(short vowels) head, hook (long vowels) boat, sigh, weigh (diphthongs) toil, bout
Vowel-r combinations	A vowel, followed by r, works in combination with /r/ to make a unique vowel sound.	car, sport, her, burn, first
Vowel-consonant-e (VCe)	A common pattern for spelling a long vowel sound.	gate, mete, rude, hope, five

- Common spelling patterns

  English orthography (the writing system) has many patterns governing the order of letters, the use of certain graphemes for sounds occurring in specific positions in words, and the rules for adding endings or suffixes to base words. For example, ai can be used for long a if it is followed by a consonant (bail, stain, paid), but ay can be used when long a ends a word (bay, stay, pay). The sound /k/ is spelled with 'c' before a, o, and u, and with the letter 'k' before e, i and y.

- Spelling patterns for basic syllable types

  Every syllable has a vowel phoneme and a vowel grapheme. English uses six basic patterns for spelling syllables that can help a student recognize how the vowel sounds in an unknown word and that can help students understand aspects of spelling, such as why some letters are doubled. These syllable types are more useful for explaining words with two syllables than words with many syllables.[25] Nevertheless, some acquaintance with these syllable spelling patterns is a helpful step in learning to read and write words with more than one syllable. Table 5 illustrates the six syllable types usually taught in a structured literacy program.

[25] Kearns, 2020

Table 6: Six Written Syllable Types in English		
Syllable Type	**Examples**	**Definition**
Closed	dap-ple hos-tel bev-erage	A syllable with a short vowel spelled with a single vowel letter ending in one or more consonants.
Vowel-Consonant-e ("Magic e")	compete despite	A syllable with a long vowel spelled with one vowel + one consonant + silent *e*.
Open	program table recent	A syllable that ends with a long vowel sound, spelled with a single vowel letter.
Vowel Team	awe-some train-er con-geal spoil-age	Syllables with long, short, or diphthong vowel spellings that use two to four letters to spell the vowel. Diphthongs *ou/ow* and *oi/oy* are included in this category.
Vowel-r (r-controlled)	in-jur-ious con-sort char-ter	A syllable with **er, ir, or, ar**, or **ur**. Vowel pronunciation often changes before /r/.
Consonant-le	dribble beagle little	An unaccented final syllable containing a consonant before /l/ followed by a silent *e*.
Leftovers: Odd and Schwa syllables	dam-age act-ive na-tion	Usually final, unaccented syllables with odd spellings.

- Morphemes or meaningful parts of words

  Many words in English are made up of morphemes or meaningful word parts, including prefixes, roots, and suffixes. Inflectional suffixes, or those common endings that do not change the part of speech to which they are added (-s, -es, -ed, -ing, -er, -est) must be learned first because they are so common. Parts of compound words (doghouse, butterfly, schoolyard) are often taught next. Common prefixes (e.g., un, re, mis, pre) and derivational suffixes that do change a word's part of speech (e.g., -ly, -ment, -ous, -less) are next. When students start working with common Latin roots (e.g., port, tract, ject, fer), they can realize how many words are created from these building blocks. Studying morphology helps with reading, spelling, and vocabulary, and is shown to be particularly effective in interventions for students with dyslexia.[26] Tables 6 and 7 list some common affixes and roots in English.

[26] Arbak & Elbro, 2010; Berninger, et.al, 2010; Bowers, Kirby & Deacon, 2010

Table 7: The Most Common Prefixes and Suffixes in Printed School English[27]				
Rank	**Prefix**	**Percentage of All Prefixed Words**	**Suffix**	**Percentage of All Suffixed Words**
1.	un-	26	-s, -es	31
2.	re-	14	-ed	20
3.	im-, in-, il-, ir-	11	-ing	14
4.	dis-	7	-ly	7
5.	en, em	4	-er, -or (agent)	4
6.	non-	4	-ion, -ation, -ition, -tion	4
7.	in-, im- (in)	4	-able, -ible	2
8.	over-	3	-al, -ial	1
9.	mis-	3	-y	1
10.	sub-	3	-ness	1
11.	pre-	3	-ity, -ty	1
12.	inter-	3	-ment	1
13.	fore-	3	-ic	1
14.	de-	2	-ous, -ious, eous	1
15.	trans-	2	-en	1
16.	super-	1	-er (comparative)	1
17.	semi-	1	-ive, -tive, -ative	1
18.	anti-	1	-ful	1
19.	mid-	1	-less	1
20.	under- (too little)	1	-est	1
All others		3		7

Table 8: Common Latin and Greek Roots in English			
Latin Root	**Meaning**	**Greek Combining Form**	**Meaning**
amo	love	aero	air
annum	year	anthropo	human
aqua	water	biblio	books
aud	hear, listen	bio	life
cede	yield	chron	time
cess	go, move	cosm	universe
cide, cise	cut, kill	crat	rule
cred	belief	dem	people
dic, dict	say, speak	gen	birth
duc	lead	geo	earth
fer	bear, carry	graph	write, record

[27] White, Sowell, & Yanagihara, 1989

Latin Root	Meaning	Greek Combining Form	Meaning
flect	bend	logo, logy	study of
form	shape	mech	machine
grat	pleasing	path	feeling
jud, jur, jus	law	phon	sound (language)
mis, mit	send	photo	light
nat	born	poly	city
rupt	break	psych	mind
scribe, script	write	scop	see
tract	pull	therm	heat
vid, vis	see		

- Basics of word origin (etymology)

  The history of a word or its etymology is often useful in explaining the relationship between its sound, spelling, and meaning. The historical layers of English – mainly Anglo-Saxon, French, Latin, and Greek – explain some important aspects of word structure and spelling. For example, the word "character" uses ch to spell /k/ because it comes from Greek, but the word machine uses ch to spell /sh/ because it came to English through French. Table 8 shows how the English spelling system is influenced by the language from which a word originated.

Table 9: Spelling Patterns in English by Language of Origin

HISTORICAL LAYERS OF ENGLISH	Phoneme-Grapheme Correspondence	Syllable Patterns	Morphemes
Anglo-Saxon Layer	consonants -single -digraphs -blends vowels -single short/long -long VCe -vowel team -vowel-r patterns	closed (short V) open (long V) VCe (long V) vowel-r vowel team consonant-le (oddities)	compounds (*daylight*) inflections *(-ed, -s, -es, -er/ est, -ing)* base words suffixes *(en, hood, ly, ward)* odd, high frequency words *(said, does)*
Latin (Romance Layer)			prefixes *(pre, inter)* roots *(gress, ject, vis)* suffixes *(ment, ity)* Latin plurals *(alumni, minutiae, curricula)*

HISTORICAL LAYERS OF ENGLISH	Phoneme-Grapheme Correspondence	Syllable Patterns	Morphemes
Greek Layer **(Grades 6-8)**	ph for /f/ *(graph)* ch for /k/ *(chorus)* y for /i/ *(gym, gyrate)*		Combining forms: (*neuro, psych, ology, lex, chloro, photo, graph)* Greek Plurals:*(crises, parentheses, metamorphoses)*

- Syntax or sentence structure

  Reading comprehension and written expression require students to understand how sentences work. At a minimum, the differences between simple, compound, and complex structures are taught, along with manipulation of phrases and clauses – both dependent and independent – in building sentences that clearly convey ideas.[28]

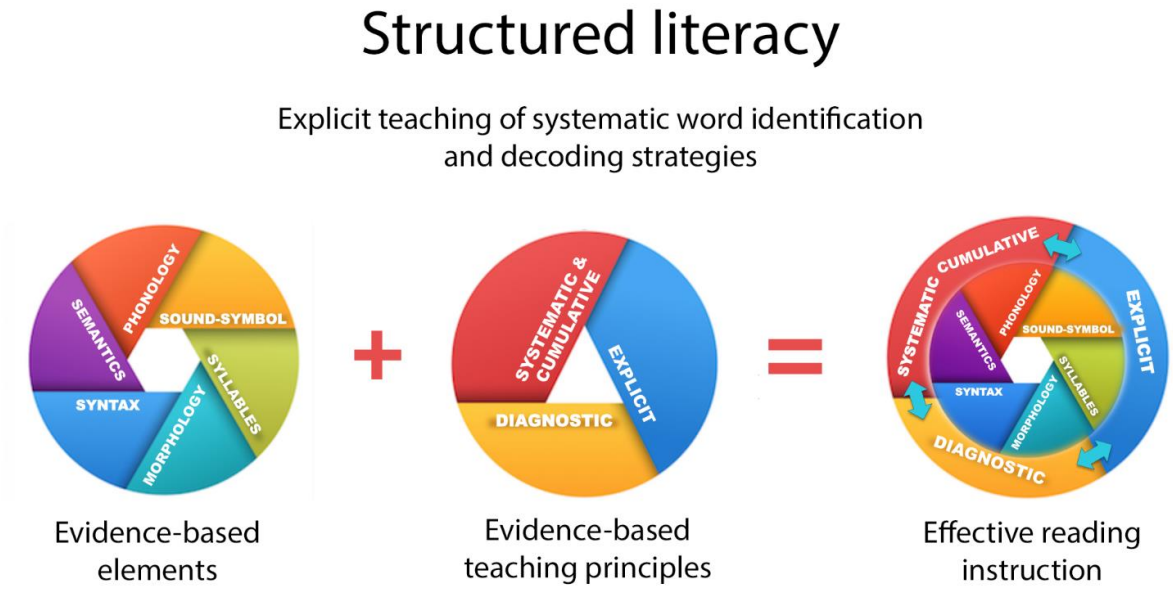
- Word meaning and meaning relationships (vocabulary)

  Building the mental dictionary, or knowledge of word meanings and their connections, is an on-going goal in structured literacy. Even in a lesson focused on decoding skills, there should be exercises focused on the meanings of the words being read and their use in context. Words prioritized for in-depth instruction should be those that are central to understanding a topic or a text reading that the student is undertaking.

- How paragraphs and text selections are organized

  Students can be shown, through diagrams (graphic organizers), how main ideas and details are typically organized in paragraphs. In addition, they should learn the characteristics of various genres, especially typical story structure and various types of informational texts. Insight into text organization helps students know what to expect when they begin to read, to better track whether the text is making sense, and to remember the content.

[28] Jennings & Haynes, 2021



Source: © 2016 Cowen for International Dyslexia Association
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3.3 KEY ELEMENTS OF A STRUCTURED LITERACY LESSON DESIGNED TO ACCELERATE PROGRESS

3.3.1 Elements of the Lesson Format

The goal of work on basic or foundational language skills is to improve the ability to read for meaning and write to be understood. The goal is also to accelerate a student's rate of progress so that they gain in relative standing, as measured by standard scores. Thus, the structured literacy lesson framework has the following elements[29] and addresses all essential language components from phoneme awareness to reading and writing meaningful text.

Word Recognition (15-25 minutes)

- Review
- Phoneme or speech awareness – focused on listening to, speaking, and manipulating the speech sound(s) taught in the lesson
- Instruction in new sound-symbol association (with phonemes, syllables, or morphemes)
- Decoding and/or spelling strategies applied to words
    - Pattern-based words
    - Exception words
- Guided practice with immediate feedback that corrects mistakes quickly

[29] Spear-Swerling, 2022; Moats & Tolman, 2018

Building Fluency and Automaticity (5-10 minutes)

- Quick (1 minute) speed drills with words/patterns that have been taught
- 2-4 timed repeated readings of a text
- Phrase-cued reading; partner reading; alternate oral reading; choral reading

Text Reading Comprehension (Instructional Level) (10-25 minutes)

- Use of instructional level text, often a decodable, that student can read at a 90-95% correct level
- Explicit teaching of a few important word meanings (vocabulary)
- Teacher-guided questioning, clarification, summarization as text is read
- Partner talk: What was this about?

Language Comprehension (Listening) (10-15 minutes)

- Use of grade-level text or "stretch" text for teacher to read aloud
- Teacher-led discussion of several important vocabulary words, using vocabulary routine
- Explanation of confusing or challenging syntax
- Summarizing, graphing, illustrating, discussing, debating important meanings in the text

Writing (15 minutes)

- Writing of words, phrases, and/or sentences with the pattern(s) being taught
- Composing sentences using sentence builders or sentence combining
- Editing/rewriting simple sentences to combine or elaborate
- Writing in response to reading; combining sentences into paragraphs

Generally, it is not possible to address all these lesson components in one small group instructional period, and the whole lesson sequence will need to stretch over two or more instructional sessions.

3.3.2 Teaching Phoneme Awareness

The biggest gains for students with moderate to severe reading disabilities have occurred in studies that include explicit practice on phoneme identity and manipulation, beyond simple phoneme segmentation or tapping out sounds.[30] The phoneme awareness part of the lesson is brief but targeted at a level the student can handle and uses the sounds the student is working on for reading and spelling. The range of tasks, from easy to more complex, is shown in Table 10 below.

[30] The effectiveness of various approaches is reviewed in detail by Kilpatrick, 2015.

Table 10: Typical Phoneme Awareness Tasks, from Early to Complex		
Level of Difficulty	**Description of Task**	**Example of Task**
Easiest	Match words that begin or end with the same sound.	Which words start with the same sound? (milk, table, moon)
	Separate a first sound from the rest of a simple syllable (with no blends).	Say the first sound in zoo (/z/).
	Say the separate sounds in a simple syllable with 2-3 phonemes.	Say each sound in "show" (/sh/ /o/).
Basic (Words without Blends)	Delete a first sound from a single, simple syllable and say what's left.	Say "feet." Now say "feet" but don't say /f/. (eat)
	Change the beginning sound (onset) and keep what's left (the rime) to make a new word.	Say "done." Now say "done," but instead of /d/ say /r/. (run)
	Delete a beginning phoneme from a word that begins with a blend.	"Say *sleep.* Now say *sleep* but don't say /s/." (leap)
	Delete a final phoneme.	Say *sheet*. Now say sheet but don't say /t/." (she)
More Complex (Vowels and Words with Blends)	Substitute a medial vowel in a one-syllable word.	"Say *ran*. Now say *ran* but instead of /a/ say /u/." (run))
	Delete the second phoneme in an initial blend.	"Say *bread.* Now say *bread* but don't say /r/." (bed)
	Substitute the second phoneme in a blend.	"Say *crew.* Now say *crew* but instead of /r/ say /l/." (clue)
	Substitute a final phoneme.	"Say *some*. Now say *some* but instead of /m/ say /n/." (sun)
Most Complex	Delete the internal phoneme in a final blend.	"Say *ghost.* Now say *ghost* but don't say /s/." (goat)
	Substitute the internal phoneme in a final blend.	"Say *west.* Now say *west* but instead of /s/ say /n/." (went)

As they are learning to read and spell, students' skills will be bolstered by direct practice mapping sequences of written graphemes to the phonemes in the spoken word – the essential underpinning for anchoring a word in memory. Being able to complete more advanced phoneme awareness tasks with fluency supports fluent recognition of "sight" words.[31]

[31] Kilpatrick, 2015

3.3.3 Teaching Phonics and Decoding

Following a scope and sequence that systematically addresses the major elements described in section 3.1 is essential. Phoneme-grapheme correspondences are taught gradually, one at a time, in an "I do, we do, you do" sequence. The sound is introduced, a grapheme or grapheme pattern that represents it is presented, and then students practice identifying the correspondence in isolation and in the context of words they decode and write.

Here is a sample of an introductory dialogue:

Teacher:

"Today we will study another Vowel-Consonant-e or VCe pattern, this one for /ī/ or "long i." We've already learned the VCe pattern for /ā/ as in *cake*, *safe*, and *tape*.

"First, let's listen for the sound. If you hear /ī/ in the word I say, put thumbs up. (*ride, hike, made, fit, bite*, etc.) Look in the mirror as you say the vowel /ī/. What is your mouth doing?

"A letter pattern that represents long vowels is VCe: one vowel letter, a single consonant, and a silent **e** at the end.

"Let's say the sounds in the word *side.* /s/ /ī/ / /d/." Teacher models writing three line or moves blocks into three sound boxes as students say the three sounds, raising a finger for each sound or moving tokens into boxes.

Teacher writes the word *side* on the lines or in the boxes. "Look at the word *side.* How many letters are there?" (Four.) "How many sounds? (Three.)

"Which letter represents no sound by itself? (**e)**. The letter e does not get its own box [or its own line] because it does not represent a vowel sound by itself. Its job is to reach back over the consonant, tap the vowel and make it say its own name. (Teacher draws arrow from the silent e back to the sounded vowel letter.)

Many forms of practice can be used as the new correspondence pattern is applied to word reading and spelling. They include activities such as:

- phoneme-grapheme mapping,
- sound-by-sound blending,
- finding targeted words in a list,
- word sorting, and
- word building using letter tiles.

Although all well-designed and effective programs progress from easy to difficult and from wide contrasts to narrow contrasts of phonemes and graphemes, and all progress from simple correspondences to multi-syllable words to longer words with several morphemes, there is no single scope and sequence that all effective programs follow. An example of one scope and sequence for teaching word recognition and spelling is in Appendix B.

3.3.4 Developing Automatic "Sight" Word Reading

Learning phonics is not enough. Words must be read automatically, by sight – a result of many opportunities to read them accurately both in and out of context. Whatever is taught in the phonics and decoding part of the lesson must be applied and practiced in reading words, phrases, and meaningful stories that use the words. While a typically developing student may remember a word after one to four exposures, a student with dyslexia may need ten to two hundred exposures to record that word in memory so that it is recognized automatically. Practice with decodable text is essential, but decodable text is only appropriate if it has a high proportion of words with patterns that have been systematically taught. Thus, commercially advertised books that claim to be decodable may not fit the scope and sequence of the program the teacher is using and may not be helpful.

High frequency irregular words or exceptions (such as *they, said, of, do, done*) are also learned through a sound-symbol mapping process, but the student must remember an unusual letter pattern for a sound pattern. The irregular part of a word can be identified but the sounds must still be mapped to print. There is no such thing as "using the eye like a camera" to memorize irregular words.

Techniques for studying these words include:

a) Creating a "spelling pronunciation" to map speech to print, such as /w//ă//s/ for *was*.

b) Marking the irregular grapheme with a heart because it must be learned "by heart" and then constructing the word with letter tiles before writing it several times.[32]

c) Learning related words as a pattern: *go, gone; do, done*; *where, there, here*

d) Looking at the word's history and meaning to make sense of its spelling: *said* = say + ed.

3.4 INTENSITY OF INSTRUCTION

Within a MTSS framework, students who are at risk, after additional assessment has occurred (see Section 4), are quickly assigned to small groups of students with similar needs and given instruction designed to accelerate their growth. The size of a group will depend on several factors, but evidence suggests that groups should be no more than 1:4 students if accelerated progress is be achieved with needier students.[33] If students are not making meaningful progress after a few weeks, the intensity of instruction can be changed, including but not limited to:

- Reducing the intervention group size to 1-1 or 1-2

[32] Image: Winter, 2021
[33] Kilpatrick, 2015; Wanzek & Vaughn, 2007

- Increasing the frequency and duration of lessons
- Improving implementation of the approach or program by providing the teacher or tutor with expert coaching (or changing the teacher / tutor if needed)
- Placing greater emphasis on developing the student's proficiency with phoneme awareness, retention and application of decoding skills, and opportunities to practice

Idaho statute Section 33-1807 requires students in kindergarten through third grade who do not score proficient on the fall IRI to receive 30 or 60 hours of literacy intervention (depending on their score). However, some students may need more hours, which could be addressed in their individual reading improvement plan (Section 33-1805). Several gold standard research studies have reported lasting and significant gains when students who are below the 30th percentile in grades K-2 receive 75-120 hours of intervention with lessons that are 30-40 minutes in length.[34] The requirement for 60 total hours may not be sufficient to get some students on track for normalized reading growth.

3.5 TEACHING PRINCIPLES: EXPLICIT, SYSTEMATIC, AND MULTI-SENSORY

Explicit

The term "explicit" means that the teacher explains and illustrates a new concept directly, without relying on students to discover it themselves or pick it up from some incidental examples. Initial instruction is followed by planned practice and application to meaningful reading and writing.[35]

Systematic and Cumulative

The term "systematic" means that concepts are presented within a defined scope and sequence in which more complex ideas or patterns build up from easier ones. (For example, vowel teams are studied after short vowels and the more common vowel-consonant-e (VCe) long vowel patterns.) Cumulative means that review of previously learned material is frequent and each new element builds on earlier learning. The process has been compared to building a foundation wall, brick by brick.

Multi-modal or Multi-sensory Learning

Practitioners have traditionally used the term "multi-sensory" to describe a basic tenet of intervention for students with dyslexia.[36] "Multi-modal" has also been suggested as a descriptor.[37] Both terms mean that students will stay engaged, pay attention, and remember better if they link spoken language, the visual stimuli of print, and touch or pencil movement

[34] Foorman & Al Otaiba, 2009
[35] Archer & Hughes, 2011
[36] Birsh & Carreker, 2018
[37] Fletcher et al., 2019

together. There are many ways that this principle can be applied during lessons. Here are a few examples.

A) To practice sound-symbol association, in the original Orton-Gillingham method, the student looks at a grapheme, says the sound it represents, says the letter name, and then traces or writes the letter(s) while associating the sound with a key word. This activity is known as "V-A-K" for "visual, auditory, and kinesthetic." The order of associations is then changed to A-V-K; the student hears a phoneme, says or identifies the grapheme and keyword associated with it, and writes the letter(s).

B) To segment the sounds of spoken words, the student moves colored tokens into boxes as the sounds are spoken. The colored tokens may then be replaced with movable letters or letter tiles.

C) To learn to form or write letters, the student writes large in a sand tray or rough board before tracing and writing letters on paper.

D) To spell, the student moves letter tiles onto lines on a magnetic board, then checks the word back by touching the tiles while he/she says the sounds and the blends whole word.

E) To group words into phrases and phrases into sentences, the student works with a partner and moves word cards on a large surface.

F) While identifying pronoun references in a text, the student uses colored pencils, drawing arrows between words that refer to one another.

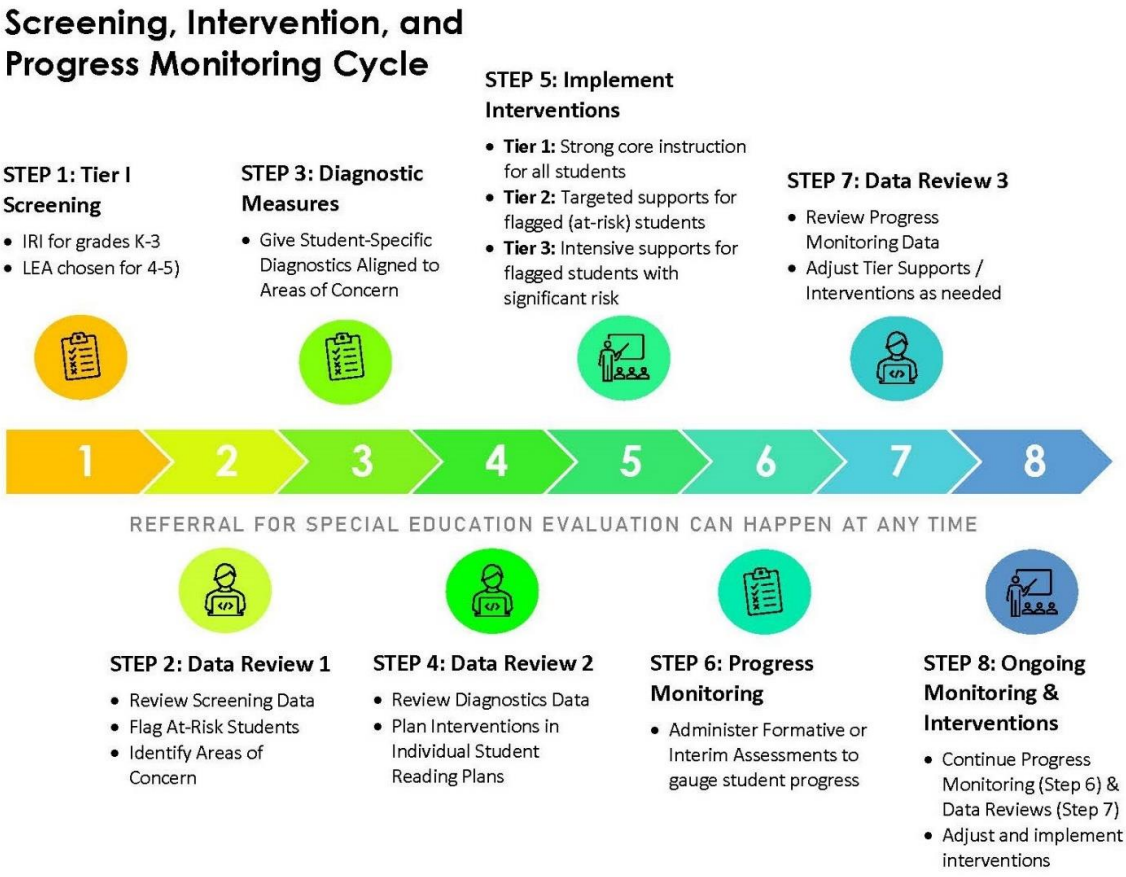
Touch, movement, and linking of visual symbols with spoken language are fundamental to effective instruction.

SECTION 4:

SCREENING & TESTING FOR DYSLEXIA

4.1 OVERVIEW OF THE SCREENING, INTERVENTION, AND PROGRESS MONITORING PROCESS

Screening and testing for dyslexia can be conducted in three phases, each one requiring more time and professional expertise. In addition, progress monitoring for students receiving intervention through an individual reading plan should be ongoing. Again, the educational needs of each student must be the focus, even if a definitive diagnosis of a problem is not yet determined. The image below outlines the full process, from screening, to ongoing progress monitoring and intervention services.



4.2 TIER I SCREENING USING THE IDAHO READING INDICATOR (IRI)

Idaho statute Section 33-1811 requires schools to use the Idaho Reading Indicator (IRI) for Tier I screening to identify students in kindergarten through grade three who are at risk for reading difficulties, including characteristics of dyslexia. Students in grades four and five are given a Tier I screener as chosen by their LEA. The purpose of the Tier I screening is to flag students who are not progressing well enough with regular classroom instruction and who may fall further behind without additional intervention or support. It is not to provide detailed information about the student's academic learning needs or to formally diagnose the student's difficulty.

Tier 1 screening in the primary grades may provide preliminary evidence that the student is struggling with the foundational skills that are typically weak in dyslexia: phoneme awareness, letter knowledge, phonic decoding, spelling, processing speed, and text reading fluency. The most common "red flags" in students in the intermediate grades will be low scores in text reading fluency, including word reading and passage reading fluency, and spelling.

For grades K through 3, the IRI reports composite and subtest scores for individual students. Whether a student is At Grade Level/Proficient should *not* be used to determine if the school team will administer Tier II Diagnostic Measure(s) to the student for characteristics of dyslexia. Rather, the subtest scores should be reviewed for patterns of at-risk reading according to the guidance from Idaho's IRI current vendor, Istation, as provided in Appendix A: Guide to Screening and Diagnostic Measures. Tier I screening guidance for grades four and five is also provided in Appendix A.

4.3 TIER II DIAGNOSTIC MEASURES TO INFORM INSTRUCTION

Idaho statute requires schools to administer one or more diagnostic measures if a student's Tier I screening appears to indicate the student may have characteristics of dyslexia. The diagnostic measures required by law are not intended to diagnose a student with dyslexia or any specific learning disability. Rather, the aim of the diagnostic measures is to identify where, in a sequence of skill development, a student's instruction should begin and where it should aim. This could be focused on characteristics of dyslexia or could address broader reading challenges.

Depending on a student's individual screening results and needs, Tier II diagnostic measures should include some or all of the following:

- Vision and hearing screening. Occasionally, students have previously undetected hearing or vision loss that can be treated with hearing aids or glasses.
- Review of school records for attendance, prior reports. Teams should know about any previous documentation of a student's learning challenges.
- Conversation with parents about their concerns. Often, parents have observed their child's learning differences well before formal schooling begins.
- A diagnostic survey of phoneme awareness. The survey involves oral language tasks and does not involve print. It should include items that are sequenced for difficulty, according to research on phoneme awareness development, and span both basic skills such as phoneme matching and more complex skills such as phoneme substitution and deletion. The survey should be administered in person by a qualified teacher or specialist because students' oral responses are important to observe and record. Some of the most sensitive tests of phoneme awareness also time the students' responses to measure the student's proficiency with the tasks.[38]
- Phonics, decoding, and word reading survey. This inventory is given to show where, in a scope and sequence, the student's instruction should focus. It should assess the student's

[38] Kilpatrick, 2015

knowledge of letter names; knowledge of individual sound-symbol (phoneme-grapheme) correspondences; recognition of the syllables in longer words; recognition of common morphemes or meaningful word parts such as prefixes, roots, and suffixes; ability to decode novel or unfamiliar words; and ability to read real words out of context. Most importantly, it should correspond to the scope and sequence of the instructional program in use.

- Oral reading for fluency and accuracy. Timed reading of short passages, with comprehension questions, is a common and important way of assessing reading fluency. Several well-validated curriculum-based assessments provide short passages that progress in difficulty, and that allow calculation of words correct per minute in one-minute timed readings. These scores can be compared to the fluency norms that were updated by Hasbrouck and Tindal in 2017.[39]
- Written spelling, diagnostic inventory. Measurement of spelling should include a standardized test of dictated words to determine a student's spelling standard score and percentile rank, which will clarify the severity of the spelling issues. In addition, a diagnostic inventory will help identify the specific spelling patterns the student knows or needs to learn (e.g, short vowels, consonant blends, vowel teams, etc.).
- Writing and classwork samples. Observation of a student's responses to classwork and written assignments should be made to determine the kind of support that might be necessary for the student to complete tasks successfully.
- Vocabulary and language comprehension. Additional assessment in these areas may be necessary, depending on the results of the Tier I screening. A first step in assessing language comprehension can be reading passages aloud to students to see if they can retell or answer questions that they could not answer by reading alone. If a student's language comprehension and expression appear to be problematic, referral to a Speech-Language Therapist may be indicated.

The diagnostic measures can be conducted by qualified teachers and interventionists on the school's staff who have been trained to give and score the assessments. Appendix A provides additional information regarding how to use students' Tier I data to guide which diagnostic measures are administered (including specific diagnostic measures LEAs can use).

School teams should use the results of the diagnostic measures to develop the specific intervention services that should be outlined in students' individual reading plans, as required by Idaho statute.

4.4 ANALYZING THE DATA: QUALITATIVE INDICATORS

What is different or distinctive about the picture that a student with dyslexia presents? There is no clear-cut answer in many cases, as students may exhibit only some of the following difficulties

[39] Hasbrouck & Tindal, 2017

or may present with less severe reading and writing problems that still require intervention. Some of the most important indicators are described below.

- Family history of reading/spelling difficulties

  Whenever a family shares this history, the student's progress should be carefully monitored because the student has a 50% chance of also experiencing dyslexia.

- Letter naming

  The student may persistently confuse letter forms and letter names, especially those that sound the same (such as g, j; m, n) or those whose names do not have the sounds the letters represent (such as y, w, h).

- Phoneme awareness

  The student cannot efficiently take sounds in words apart, blend them together, or substitute them to make new words.

- Letter-sound correspondence

  The student has poor memory for the sounds that letters represent, within a lesson or from lesson to lesson.

- Word and nonword reading accuracy and fluency

  The student attempts word reading without systematic decoding and relies on guessing without analyzing the letters and sounds in a word. When trying to apply phonics skills that have been taught, is inaccurate and/or very slow.

- Spelling

  The student's spelling shows an inability to represent the sounds in words that are written, especially omission of sounds and confusion of similar sounds (/f/, /v/; /r/ /w/). If the student can spell words phonetically, by representing sounds in a plausible way, they have taken an important step forward.

- Passage reading rate or fluency

  Some students are very slow and inaccurate; others slow but accurate; and others fast and inaccurate. It will be important to improve accuracy before emphasizing speed or fluency during reading lessons.

- Vocabulary

  Some students with dyslexia confuse similar sounding words and names (e.g., Benedetti/Benintendi; syllable/syllabus). Persistent confusions, even after correction and practice, can be a sign of a phonological memory problem – a core problem in dyslexia.

4.5 PROGRESS MONITORING

Student progress should be monitored regularly, about every two weeks of instruction, to see whether gaps in achievement are being narrowed by virtue of the extra intervention and support the students are receiving. Progress monitoring assessments are brief (no more than 5 minutes) and directly measure the student's retention of skills and concepts recently taught. Progress monitoring assessments, such as timed passage readings, should be reliable and validated for this purpose.

Progress is best monitored with curriculum-based measures (CBMs). These are short, usually timed, tests of oral passage reading fluency and accuracy, word reading, sound-symbol association, or other skills. It is important to use tasks that are validated for this purpose and that have multiple equivalent forms. In Idaho, it is also important that student progress is monitored using standardized, norm-referenced tools in the event that the problem-solving team suspects that a student may require special education and/or related services. Many teams choose to use these tools in addition to more targeted CBMs. Information about progress monitoring procedures can be found at the Center for Intensive Intervention, along with reviews of progress monitoring assessments such as those offered by Acadience Reading, AIMSweb, FastBridgeLearning, DIBELS-8, and EasyCBM.

Data from progress monitoring assessments will be the basis for subsequent decisions about whether the student's intervention plan needs to change. Not only should a student be making some progress with intervention, but everyone's goal should be to close or narrow the gap between student performance and grade level performance. In most cases, a student's response rate will be evident within the first 15-20 hours of instruction, and if that accelerated rate of progress continues, the intervention should likely be sustained.[40]

If the student is not responding to instruction with gains toward grade level performance, intervention should be further intensified (Tier III), which could include the following options, as described in a previous section:

- Reduce the size of the intervention group
- Increase the frequency and duration of lessons
- Provide additional training or supervision to the teacher or tutor
- Change the program's focus, content, or procedures
- Obtain a more comprehensive professional evaluation
- Determine whether a referral to consider special education evaluation is necessary

[40] Torgesen, 2004b

4.6 COMPREHENSIVE EVALUATION FOR SPECIAL EDUCATION ELIGIBILITY

General education aligned with the ICLP provides evidence-based literacy instruction to help students who experience reading difficulty through early and responsive support (MTSS tiered interventions). Many students who may have dyslexia can and should make effective progress with these general education supports. However, for students who may need special education services to make effective progress, timely and appropriate special education evaluation and eligibility determination is key.

4.6.1 Use of the Term Dyslexia in Schools

Both Federal and State guidance allow the use of the term dyslexia during evaluation, eligibility determinations, and IEP documents, when students meet the criteria as a student with dyslexia or exhibits characteristics of dyslexia. By specifying the nature of the students' specific learning disability, the team can formulate goals, make instructional decisions, and identify appropriate accommodations and modifications in a more strategic manner.

4.6.2 Referral to Consider a Special Education Evaluation

A student can be referred for special education evaluation in three ways. First, IDEA and Idaho law require public schools to proactively identify and evaluate all students aged 3-21 who are suspected of having a disability. This is known as Child Find. School districts must locate all students with disabilities living or attending school in the district, including English learners and students who are highly mobile or homeless, regardless of whether the students attend public or private schools or are home schooled. Second, young children already receiving services through the Infant Toddler Program (ITP) must be referred by ITP for a district evaluation as they approach their third birthday.

Finally, parents/guardians and school personnel can refer a student for an initial evaluation to determine whether the student needs special education or related services. For example, referrals can be initiated when a student does not respond to interventions within the MTSS model as evidenced by ongoing progress monitoring data (see Section 4.4). Another prompt for referral could occur when screening data reveals that a student has a significant risk for dyslexia. This referral can be made at any time when a student is suspected of having a disability that is causing an inability to progress effectively in the general education curriculum. The use of screening measures and/or tiered interventions may not be used to delay or deny a full and individualized evaluation of a student suspected of having a disability, but they could continue throughout the special education evaluation process.

The first step in a *Referral to Consider a Special Education Evaluation* process in Idaho will begin with assembling an evaluation team, of which the parent/guardian is a mandatory member, and *Procedural Safeguards* are initiated. As a team, school team members and parents together will review existing evidence, identify the student's specific area(s) of concern, and determine whether an evaluation for special education is warranted.

> Specific Learning Disability (SLD) means a disorder in one or more of the basic psychological processes involved in understanding or in using language, spoken or written, that may manifest itself in the imperfect ability to listen, think, speak, read, write, spell, or to do mathematical calculations, including conditions such as perceptual disabilities, brain injury, minimal brain dysfunction, **dyslexia**, and developmental aphasia.
>
> Specific Learning Disability does not include learning problems that are primarily the result of visual, hearing, or motor disabilities, of intellectual disability, of emotional behavioral disorder, or of environmental, cultural, or economic disadvantage.
>
> Only a school age child may be identified as a student with a specific learning disability.
>
> *Idaho Special Education Manual,* Chapter 4, Section B.8

The criteria for identifying a student with a specific learning disability are established by state and federal law. In Idaho, the criteria include a student's response to evidence-based intervention in targeted skill areas and measured by norm-referenced progress monitoring tools. Although eligibility for special education includes students with dyslexia, students with dyslexia must meet state criteria for a specific learning disability or another appropriate category in order to receive special education services.

In addition to demonstrating failure to respond to evidence-based interventions, Idaho requires the results of the evaluation to indicate low achievement in the area(s) of suspected disability as evidenced by a norm-referenced, standardized achievement assessment and a pattern of strengths and weaknesses in psychological processing skills that impact learning. The Idaho Special Education Manual outlines the specific evaluation procedures and evidence required for identifying SLD. Finally, students must meet the Three-Prong Test of Eligibility:

Prong 1: The student has a disability according to the established Idaho criteria

AND

Prong 2: The student's condition adversely affects educational performance

AND

Prong 3: The student needs specially designed instruction.

If an evaluation team suspects that a student may be a student with dyslexia, the evaluation may include assessment of the following:

- A thorough developmental, medical, and educational history, to include documentation of response to previous instruction
- Phonological and phonemic awareness
- Working memory for language, including sounds, syllables, words, and sentences
- Rapid Automatic Naming (RAN) – speed of naming objects, colors, digits, or letters
- Receptive and expressive vocabulary – understanding and use of spoken words
- Phonics and decoding, applied to real and nonsense words
- Oral and silent passage reading fluency, with comprehension questions
- Spelling and written expression

Special education interventions are considered the most intensive and are provided based on a student's eligibility and need for specialized instruction. The student will remain in the core instruction (Tier I) and will have access to tiered intervention within the general education curriculum to the greatest extent possible. Interventions will be tailored to the student in the area of identified disability (i.e., dyslexia-specific interventions when appropriate), and progress toward their Individualized Education Program (IEP) goals will be monitored according to the IEP. If students fail to respond to intervention provided through special education services, an IEP team will be reconvened.

4.6.3 Dyslexia in Federal Law

Three federal laws apply to students with disabilities, including students with dyslexia. Brief summaries of these laws' requirements and protections are summarized below.

Federal Laws Pertaining to Dyslexia and Other Learning Disabilities

The Individuals with Disabilities Education Act (IDEA)

The Individuals with Disabilities Education Act (IDEA), formerly called P.L. 94-142 or the Education for all Handicapped Children Act of 1975, requires public schools to make available to all eligible children with disabilities a free appropriate public education in the least restrictive environment appropriate to their individual needs. The law indicates 14 different categories to define students with a disability who should be guaranteed a free and appropriate public education. One of those 14 is the category of "specific learning disability," within which dyslexia is cited as an example.

Section 504 of the Rehabilitation Act of 1973

This law is frequently invoked in cases where students do not qualify for an IEP yet may require accommodations. The Rehabilitation Act prohibits discrimination on the basis of disability in programs conducted or funded by federal agencies and in employment by the federal government or its contractors. Under Section 504, an individual with a disability (also referred to as a student with a disability in the elementary and secondary education context) is defined as a person who: (1) has a physical or mental impairment that substantially limits a major life activity; (2) has a record of such an impairment; or (3) is regarded as having such an impairment. Reading is considered a major life activity under Section 504. Section 504 requires, among other things, that a student with a disability receive an equal opportunity to participate in general education, activities, and extracurricular activities, and to be free from bullying and harassment based on disability.[41]

Americans with Disabilities Act (ADA)

The ADA, first enacted in 1990 and then updated in 2008, prohibits unjustified discrimination based on disability. It is meant to level the playing field for people with disabilities, including those who are dyslexic.

[41] U.S. Department of Education, Office for Civil Rights, 2016

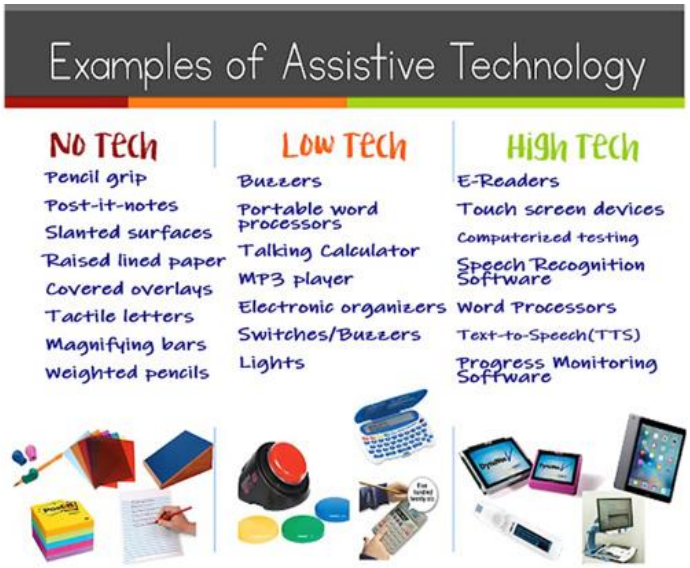
SECTION 5:

ROLE OF ASSISTIVE TECHNOLOGY, MODIFICATIONS & ACCOMMODATIONS

The goal of assistive technology, task modifications, and various accommodations is to level the playing field and give the student a fair opportunity to benefit from and successfully participate in the academic curriculum. These adaptations can provide a bridge or pathway to accessing a school's program and services. The extent to which any of these adaptations will be needed will depend on the context, the student, and the tasks being assigned.

5.1 ASSISTIVE TECHNOLOGY

Assistive technology is any item, piece of equipment, software, app, or extension that is used to support the individual functional needs of a student. Reading technology could include reading pens, text to speech, or digital books. [42] Assistive technology to support writing might include speech to text, word prediction, specialized writing devices, spelling checkers, editing software, or graphic organizers.



Some examples are provided in the image to the right[43], but it is important to note, these are not exhaustive lists. Additional information about the role of assistive technology can be found in the Assistive Technology in Schools Guide produced by Idaho Special Education Support and Technical Assistance (SESTA), available on the Assistive Technology page of the Idaho Training Clearinghouse.

While assistive technology can facilitate access to curricular materials and producing assignments by increasing, maintaining, or improving functional capabilities, it is not a replacement for explicit, direct instruction in the components discussed in Section 3.

5.2 TASK MODIFICATIONS

Task modifications include adjustments in the way a task is presented or the requirements for the student's response. For example, a task might be shortened, presented in a different modality (oral *and* written), or broken down into smaller steps. The student could be asked to respond in a different way to indicate understanding of a concept – for example, by answering questions orally. Or the student can be given more frequent feedback to ensure that he is understanding the task and practicing a skill correctly.

[42] Digital books (ebooks) can be obtained from Bookshare at no cost, for students with qualifying disabilities.
[43] State of Connecticut, Department of Developmental Services, n.d.

In instances where the expectation for learning or demonstrating what the student has learned is different than their peers, it is important to know that this may result in invalid assessment results and/or results that cannot be compared to peers.

5.3 ACCOMMODATIONS

Accommodations usually involve changing the supports available to students so they can participate in a way that allows them to demonstrate their abilities rather than disabilities. For example, providing extended time for tests, grading on written content without penalizing a student for spelling of words in a written exam, or providing a quiet(er) space to work are commonly used accommodations for students with dyslexia. Other supports may include providing an outline or written summary of what is to be taught before a class begins, assigning a note-taker to share notes on the class lecture or discussion, or making proofreading assistance available when a written assignment is finalized. Accommodations may also include use of assistive technology (i.e., speech to text or audio books) to support the student in their learning.

These modifications and accommodations do not provide an unfair advantage to students who read very slowly, who struggle with spelling and writing, and who struggle with academic language. Rather, they enable students to use their strengths and to access knowledge in the content areas (science, social studies, history, math). They remove roadblocks to learning the content in subject matter courses. Use of modifications and accommodations should be individually determined and monitored for their impact on student performance.

SECTION 6:

GUIDELINES FOR PROGRAM SELECTION

6.1 CONSIDERATIONS FOR CHOOSING MATERIALS FOR INSTRUCTION AND INTERVENTION

Ultimately, it is the teacher's knowledge and expertise that determines the impact of intervention with dyslexic students. But good instructional materials will be necessary, even for well-prepared teachers, as teachers should not be expected to create from scratch the intricately planned lessons that are a hallmark of a sound, well-sequenced, integrated instructional program. There are many sources for well-designed instructional programs and materials that are aligned with, proven by, or theoretically supported by scientific reading research.

It has become increasingly clear from decades of research that many typical programs and practices are not optimally effective with students who struggle to learn to read although those approaches have been popular for decades. **Because these programs are not grounded in the science of reading, as required by state statute and the ICLP, they should not be used**. These include programs and approaches based on "cueing systems" or "meaning, syntax, and visual" (MSV), such as those detailed below.[44]

Programs *not* recommended for use (due to inclusion of cueing or MSV systems):

- Whole language
- Balanced Literacy
- Reading Recovery
- Reading and Writing Workshop approach of Calkins.

These programs do not have systematic, explicit, cumulative lessons that build word reading accuracy and fluency, nor do they do an adequate job teaching spelling or knowledge of language structure.

Since there is no single, accepted list of "best" programs and approaches, educators must rely on good resources for guiding program selection and evaluation. These rubrics are recommended:

- The Reading League's Curriculum Evaluation Tool
- Florida Center for Reading Research, Rubric for Evaluating Reading/Language Arts Instructional Materials for Grades K-5

The federal Elementary and Secondary Education Act (ESEA), as reauthorized by the Every Student Succeeds Act (ESSA), promotes the use of evidence-based activities, strategies, and interventions in public schooling. Section 8101(21)(A) of the ESEA defines an evidence- based project component as being supported by four possible levels of evidence - *strong evidence, moderate evidence, promising evidence, or evidence that demonstrates a rationale.*

[44] Spear-Swerling, 2018

1. **Strong evidence**

   To be supported by *strong evidence*, there must be at least one well-designed and well-implemented experimental study on the intervention.

2. **Moderate evidence**

   To be supported by *moderate evidence*, there must be at least one well-designed and well-implemented quasi-experimental study on the intervention.

3. **Promising evidence**

   To be supported by *promising evidence*, there must be at least one well-designed and well-implemented correlational study on the intervention.

4. **Evidence that demonstrates a rationale**

   To *demonstrate a rationale*, the intervention should include a well-specified logic model that is informed by research or an evaluation that suggests how the intervention is likely to improve relevant outcomes. An effort to study the effects of the intervention must be planned or be underway.

These requirements, if applied to *programs*, are often unrealistic. Only a few published programs and materials have been subjected to controlled, gold standard research in which two or more programs have been compared over a year or more. This is because sophisticated, rigorous research on intervention programs is expensive and difficult to do, and many variables must be controlled or accounted for in analyzing results. Documenting exactly what kind of students were in the study requires access to personal information, time and money. Documenting what took place during the instructional time requires frequent observation and extensive record keeping. Perhaps the most challenging aspect of intervention research is that it should be "blind" to prevent bias on the part of the study participants and evaluators, and that condition is not easily met in authentic educational situations.

Therefore, educators should justify their choices of intervention programs and materials with reference to research that documents the value of specific content, activities, methods, strategies, or instructional principles in working with students with dyslexia. There are many options for materials that support well-conceived lessons, and they are not limited to those programs that claim they have research evidence to support them. Instructional components and practices that are aligned with research are the goal. Educators can review and select useful programs and instructional tools that address the requisite components,[45] that integrate those components into coherent lessons,[46] and that provide ample practice with application of skills to reading and writing. Programs and materials can be aligned with evidence by virtue of their content and design, even though the programs themselves have not been subjected to rigorous studies.

[45] Hoover & Tunmer, 2020; Petscher et al., 2020
[46] Spear-Swerling, 2022

Educators should avoid instructional practices that have been shown to be especially inappropriate for students with dyslexia. They are enumerated in the Reading League's Curriculum Evaluation Tool. They include context-based guessing at words in lieu of sounding them out, using "leveled" or phonically uncontrolled text for beginning instruction, outlining words to distinguish their shape, spelling inventively (without systematic instruction or correction), and memorizing lists of unrelated words on flash cards. Programs that only pay lip-service to decoding and that teach spelling with unrelated lists of words are inappropriate. Language comprehension programs that do not require continual back-and-forth, listening and speaking exchanges between teacher and students, will not be helpful. Writing "workshops" that de-emphasize systematic skill-building with sentences, paragraphs, and longer forms are not appropriate. Instructional time is precious, so all of it should be spent doing the activities that are most likely to support significant growth in dyslexic students.

6.2 RECOMMENDED PROGRAMS AND RESOURCES

A number of publishers and organizations have strong track records for writing, publishing, and supporting the use of intervention materials and programs for students with dyslexia. They include, but are not limited to:

- Collaborative Classroom
- Language Circle Enterprises
- Lindamood-Bell
- National Institute for Learning Development (NILD)
- Neuhaus Center of Houston
- Readsters
- Really Great Reading Company
- Scottish Rite Hospital in Dallas
- The Orton Gillingham Academy
- Tools4Reading
- Wilson Language
- Winsor Learning
- 95Percent Group

In addition, the organizations listed below provide guidance useful to teachers and other education professionals as they select their approaches to intervention.

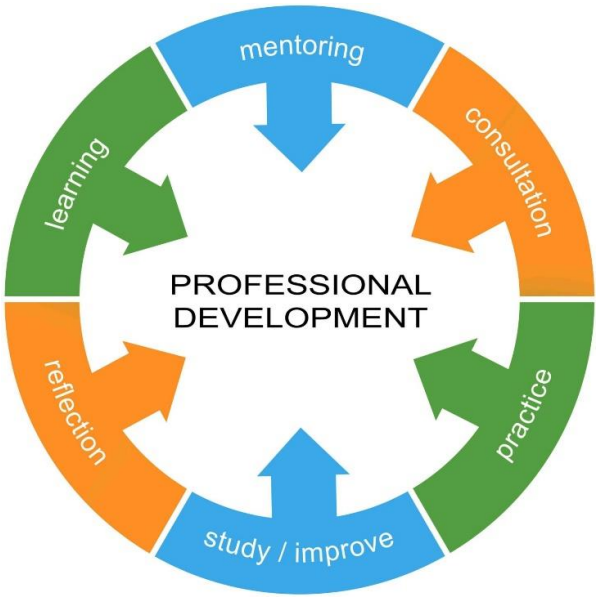
Table 11: Other Resources for Dyslexia Intervention Guidance		
Organizations	**Website**	**Notes**
International Dyslexia Association	dyslexiaida.org/	
The Reading League	www.thereadingleague.org/decodable-text-sources/	Provides a list of decodable texts and many other resources
The National Center on Improving Literacy	improvingliteracy.org	
Reading Rockets	www.readingrockets.org	
The Barksdale Institute's Reading Universe	www.readinguniverse.org	
Southwest Education Development Laboratory (SEDL)	sedl.org/about/	Including Archives at the American Institute for Research
The Florida Center for Reading Research (FCRR)	fcrr.org	
The University of Florida Literacy Institute (UFLI), Dyslexia Hub	ufli.education.ufl.edu/resources/dyslexia/	
The University of Texas at Austin/Meadows Center for Preventing Educational Risk: Vaughn-Gross Center for Reading and Language Arts	meadowscenter.org/	Offers access to research and materials developed at the center

SECTION 7:

PROFESSIONAL DEVELOPMENT & TEACHER SUPPORT

7.1 THE NECESSITY OF DYSLEXIA TRAINING FOR ALL TEACHERS

All teachers in Idaho are likely to encounter and be responsible for teaching dyslexic students in their classrooms. If one out of five students will have at least some characteristics of dyslexia, four students out of twenty in an average class are likely to struggle with basic reading, spelling, and writing skills because of this condition. At the same time, training for teachers in specific programs, practices, and understandings pertaining to dyslexia is uncommon at the preservice level.[47] Most educators, once in the classroom, will require ongoing professional development, supervision, and support to carry out the structured literacy instruction described in this Handbook.[48]



7.2 IDAHO STATUTORY REQUIREMENTS AND STATE RESOURCES

The "Dyslexia" section of the Idaho Literacy Achievement and Accountability Act (Section 33-1811) outlines specific requirements for professional development to ensure educators have the knowledge and resources they need to support students with characteristics of dyslexia. Statute specifies that the State Department of Education (the Department) must provide professional development in "multisensory structured literacy approaches." Additionally, the Department must create and maintain a list of courses that address the other professional development requirements outlined in the section. The Department has created an asynchronous, virtual training and released the course list on their website.

All educators, at a minimum, should have access to a short course that presents the definition, symptoms, and developmental course of dyslexia – a "Dyslexia 101." The dyslexia professional development required by statute should be designed to address, at a minimum, this level of training. Teachers who are responsible for teaching reading in the regular classroom (Tier 1) must be supported in understanding and applying the components of effective instruction that are described in the ICLP. Teachers responsible for implementing structured language and literacy interventions (Tiers 2 and 3 in a MTSS model) should be trained in the use of the specific programs and assessments that their school has adopted. In addition, they should participate in ongoing professional learning designed to deepen their understanding of how children learn to read, what can interfere with progress, and what to do to remove those roadblocks. Underlying these

[47] Moats, 2014
[48] Image: Cox, 2019

competencies must be a thorough grasp of the structure of language and the most important findings of research on teaching students with dyslexia.

7.3 OTHER TEACHER SUPPORT RESOURCES

The International Dyslexia Association accredits university and independent programs for teacher preparation and professional learning. The accreditation process is aligned with IDA's *Knowledge and Practice Standards for Teachers of Reading*. A summary of the IDA Standards is provided in Appendix C.

There are many organizations now accredited to provide professional development for teachers and specialists who will be working with dyslexic students. They include, but are not limited to:

- The Neuhaus Center of Houston
- Institute for Multisensory Education
- AIM Academy
- Keys to Literacy
- LETRS (Language Essentials for Teachers of Reading and Spelling), published by Lexia
- Literacy How
- Tools4Reading

The Center for Effective Reading Instruction (CERI), founded by the International Dyslexia Association and accessible online, sponsors an exam (the K-PEERI) and a certification review process for practitioners who wish to be certified as qualified providers of structured literacy instruction.

SECTION 8:

INFORMATION & RESOURCES FOR PARENTS

8.1 THE IMPACT OF PARENTS

Awareness of dyslexia and the successful passage of legislation and policies pertaining to dyslexia can be credited in large part to parents of children who have advocated relentlessly for their needs. Every state has now acknowledged the existence of dyslexia, the extensive research on dyslexia, and the importance of helping educators implement structured literacy interventions for students who are struggling as they learn to read and write.

The Decoding Dyslexia organization is a parent-led network of groups across the country who have been driving the campaign for state legislation and for public schools to provide much-needed services for their dyslexic children. Idaho has a Decoding Dyslexia chapter that all parents are welcome to join.

Several films documenting the critical role of parents in successful advocacy are available on the internet. "Our Dyslexic Children," for example, tells the story of a district in Ohio that changed its approach to identification and instruction as a consequence of parent advocacy – and successfully implemented changes that have benefited all children.

Parents are vital participants in the work of any child study team that is formulating literacy plans or Individual Educational Programs (IEPs) under IDEA. Parents have important insights into their children's early development and important observations about their children's social, emotional, behavioral, and academic needs. In addition, parental support for the efforts of educators can magnify the benefits of an intervention plan. Guidance for parents about constructive advocacy and parental participation can be found at The National Center for Improving Literacy's Parents and Families page. On this website you will find helpful information covering beginning reading, screening, and advocating for your child. In addition, the Wrightslaw website provides support in understanding federal laws governing parents' and students' rights to an appropriate education. The legal rights of parents as well as their obligations and responsibilities are also detailed in the Idaho Special Education Manual.

8.2 OTHER SOURCES OF INFORMATION FOR PARENTS

The International Dyslexia Association publishes a set of easily readable Fact Sheets written by experts in way that non-professionals can understand. In addition, IDA's annual conference includes workshops and information sessions designed primarily for parents.

Parents who wish to get involved in teaching phonics to their children at home can access a free, comprehensive set of lessons from Open Source Phonics (*opensourcephonics.org*). These lessons are designed specifically for children in grade 3 and up who have not learned to decode using knowledge of phonics.

The film-maker Harvey Hubbell's documentary on Diana Hanbury King, "One by One," shows the content and practices of a structured literacy tutorial. Ms. King was a leader of the Orton

Gillingham Academy and a widely revered teacher. Other videos in which skilled instruction is demonstrated are found on the Reading Rockets website.

A short but powerful autobiographical book that describes the experience of being a person with dyslexia is Philip Schultz's *My Dyslexia*. Mr. Schultz won the Pulitzer Prize for poetry and contrary to expectation, selected a profession in the literary arts. His narrative captures what reading is like for him and the anxiety that often accompanies the act of processing print. Another compelling life story is that of John Corcoran who learned to read in his late 40's. The John Corcoran Foundation website includes videos of the instruction he received from Patricia Lindamood to build his phoneme awareness.

Children who are struggling with dyslexia benefit from information that helps explain why they are having trouble learning something that appears so easy for their peers. An easily located "fact sheet" for kids is available on the Nemours Clinic Website. A number of good books have been written for children, including:

- *Dyslexia: Talking It Through* (2003), Althea Braithwaite
- *Fish in a Tree* (2017), Lynda Mullaly Hunt
- *Hank Zipzer: The Greatest Underachiever* (2005), a series by Henry Winkler and Lin Oliver
- *Thank You, Mr. Falker* (2012), Patricia Polacco

SECTION 9:

POSTSCRIPT

SUCCESS BEYOND WORDS

Equipped with accurate information, guidance, and opportunities to learn, most people with dyslexia succeed in life. Many examples can be cited of public figures who have accomplished notable achievements in spite of their dyslexia. Many more people with dyslexia, however, never become famous, but they do find a “niche” and make their way in the world as well as most of us. Sometimes the work they do involves a lot of reading and writing, often accomplished with various adaptations and technological supports. More often, the work they choose relies on other abilities and talents, such as political or social leadership, professional sports, creativity in the visual or performing arts, spatial and/or mechanical problem solving, or work in the outdoor environment.

Those individuals who succeed in spite of their problems with words often report that the keys to that success were several: 1) the unwavering support of an important adult, usually a parent or care-giver; 2) opportunities to develop an area of talent or competence that salvaged their sense of self-worth; 3) knowledge that they were part of a rather large community of people who faced the same challenges; and 4) the dedicated effort of at least one teacher who knew how to teach them to read.

If we work together, we can ensure that these are all part of our dyslexic children’s life experience.

GLOSSARY

Academic language: Written or spoken language that is more stylistically formal than spoken, conversational language; language that is most often used in academic discourse and text.

Alphabetic principle: The principle that letters are used to represent individual phonemes in the spoken word; insight into this principle is critical for learning to read and spell.

Assessment Types:[49]

- **Screener / Screening Assessment:** Given before instruction to inform teachers where to begin teaching core instruction, to differentiate instruction, and to flag students who are at risk for developing reading difficulties and/or who need intervention support.
- **Diagnostic Assessment / Diagnostic Measures:** Given at any time, diagnostic assessments are designed to extract precise information about students' specific skills knowledge to inform instructional interventions.
- **Progress Monitoring:** Administered frequently throughout instruction and intervention to closely monitor student progression toward mastery of concepts, skills, and grade level content.
- **Formative Assessment**: Formative assessment is an intentional ongoing process – not a single test. It describes feedback discussions between teachers and students, and students and their peers that happens *during instruction*. It's a deliberate process that is used to provide specific insight into student learning and allow for educators to adjust teaching strategies accordingly.
- **Interim Assessment**: Interim assessments are typically used to determine whether students are on track toward proficiency of the content standards. Interim assessments may be selected by teachers in the classroom to meet several instructional purposes, or administered after sufficient teaching and learning has occurred.
- **Summative Assessments**: Summative assessments are administered at the end of the year and designed to provide systems level information for state, district, and school decision making on an annual basis.

Consonant: A phoneme (speech sound) that is not a vowel and that is formed by obstructing the flow of air with the teeth, lips, or tongue; English has 25 consonant phonemes.

Curriculum-based measures: A type of progress monitoring conducted on a regular basis to assess student performance throughout an entire year's curriculum; teachers can use CBM to evaluate not only student progress, but also the effectiveness of their instructional methods.[50]

[49] State Department of Education, 2020, Accountability and Assessment
[50] IRIS Center, n.d.

Decoding: The ability to translate a word from print to speech, usually by employing knowledge of sound-symbol correspondences.

Decodable text: Reading material made up of words with patterns that have already been taught in phonics lessons; created to provide practice applying decoding skills and building fluency with known patterns and words.

Digraph: A two-letter combination (e.g., th, ph) that stands for a single phoneme in which neither letter represents its usual sound.

Diphthongs: Single vowel phonemes that glide in the middle; the mouth position shifts during the production of the single vowel phoneme, especially the vowels spelled ou and oi.

Discourse: Written or spoken communication or exchange of information and ideas, usually longer than a sentence, between individuals or between writer and reader.

Discourse structure: Organizational conventions in longer segments of oral and written language.

Dysgraphia: The condition of impaired letter writing by hand, that is, disabled handwriting. Impaired handwriting can interfere with learning to spell words in writing and speed of writing. [51]

Dyslexia: Dyslexia is a specific learning disability that is neurobiological in origin. It is characterized by difficulties with accurate and/or fluent word recognition and by poor spelling and decoding abilities. These difficulties typically result from a deficit in the phonological component of language that is often unexpected in relation to other cognitive abilities and the provision of effective classroom instruction.[52]

English learners (ELs): Students who are unable to communicate fluently or learn effectively in English, who often come from non-English-speaking homes and backgrounds, and who typically require specialized or modified instruction in both the English language and in their academic courses.[53]

Evidence-based Interventions (practice): Any of a wide number of discrete skills, techniques, or strategies which have been demonstrated through experimental research or large-scale field studies to be effective.[54]

Morpheme: The smallest meaningful unit of language; it may be a word or a part of a word; it may be a single sound (plural /s/), one syllable (suffix –ful) or more syllables (prefix inter-).

Morphology: The study of meaningful units in a language and how the units are combined in word formation.

[51] International Dyslexia Association, n.d, Understanding Dysgraphia
[52] International Dyslexia Association, n.d., Definition of Dyslexia
[53] Glossary of Education Reform, 2013
[54] IRIS Center, n.d.

Multi-tiered system of supports (MTSS): Idaho Multi-Tiered System of Support (MTSS) is a prevention-based framework of team-driven, data-based decision -making for improving outcomes for all students. The five essential components of Idaho's MTSS include; leadership, assessment, data-based decision making, multi-tiered instruction, and family and community engagement.

Onset-rime: The natural division of a syllable into two parts; the onset coming before the vowel and the rime including the vowel and what follows after it, e.g., pl-an.

Orthography: A writing system for representing language.

Phoneme: A speech sound that combines with others in a language system to make words; English has 40 to 44 phonemes, according to various linguists.

Phonemic or phoneme awareness: The conscious awareness that words are made up of segments of our own speech that are represented with letters in an alphabetic orthography.

Phoneme-grapheme mapping: The matching of letters or letter groups (graphemes) with the individual sounds (phonemes) of the spoken word that they represent. A critical step in learning to read and spell an alphabetic writing system.

Phonetics: The study of the sounds of human speech; articulatory phonetics refers to the way the sounds are physically produced in the human vocal tract.

Phonics: The study of the relationships between letters and letter sequences and the sounds they represent; also used as a descriptor for code-based instruction.

Phonological awareness: The conscious awareness of *all* levels of the speech sound system, including word boundaries, stress patterns, syllables, onset-rime units, and phonemes.

Phonological processing: Multiple functions of speech and language perception and production, such as perceiving, interpreting, storing (remembering), recalling or retrieving, and generating the speech sound system of a language.

Phonological working memory: The "online" memory system that remembers speech long enough to extract meaning from it, or that holds onto words during writing; a function of the phonological processor.

Phonology: The rule system within a language by which phonemes can be sequenced, combined, and pronounced to make words.

Schwa: The empty vowel in an unaccented syllable, such as the last syllable in *wagon* or *rebus.*

Semantics: The study of word and phrase meanings and relationships.

Sight vocabulary: A student's pool of words that are instantly and effortlessly recognized; includes both regularly spelled and irregularly spelled words.

Specific learning disability (SLD): A disorder in one or more of the basic psychological processes involved in understanding or in using language, spoken or written, that may manifest itself in the imperfect ability to listen, think, speak, read, write, spell, or to do mathematical calculations, including conditions such as perceptual disabilities, brain injury, minimal brain dysfunction, dyslexia, and developmental aphasia. Specific Learning Disability does not include learning problems that are primarily the result of visual, hearing, or motor disabilities, of intellectual disability, of emotional behavioral disorder, or of environmental, cultural, or economic disadvantage.[55]

Syllable: The unit of pronunciation that is organized around a vowel; it may or may not have a consonant after the vowel.

Syntax: The system of rules governing permissible word order in sentences.

Systematic, explicit instruction: A structured, systematic, and effective methodology for teaching academic skills.[56] Explicit instruction happens when a teacher intentionally covers academic material, scaffolding on previous knowledge and ensuring students grasp new material.

The Five Essential Reading Components[57]:

- **Phonemic Awareness***:* Phonemic awareness is the highest level of phonological awareness and is the ability to hear, identify, and manipulate the individual sounds in spoken words.
- **Phonics:** The relationship between the sounds of spoken words and the individual letters or groups of letters that represent those sounds in written words
- **Fluency:** The ability to read text accurately and quickly and with expression and comprehension
- **Vocabulary:** The words we must know in order to communicate effectively.
- **Comprehension:** The ability to understand and gain meaning from what has been read

Trigraph: a three-letter combination that represents one phoneme, e.g., -tch in ditch and -dge in dodge.

Vowel: One of a set of 15 vowel phonemes in English, not including vowel-r combinations; an open phoneme that is the heart of every spoken syllable; classified by tongue position and height (e.g., high to low, and front to back).

[55] Idaho Department of Education, Special Education Manual, 2018
[56] Archer & Hughes, 2011
[57] National Reading Panel, 2000

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RESOURCES

LINKS TO RESOURCES

Idaho Specific Resources

- Idaho Comprehensive Literacy Plan
- Idaho Statute: 33-1802, 33-1807, 33-1811
- Idaho State Department of Education Website: Dyslexia Resources; SPED Manual; ID Content Standards in English Language Arts / Literacy; Comprehensive Literacy Standards (for Educator Preparation, within the Standards for Initial Certification)
- Idaho Special Education Support and Technical Assistance (SESTA): Idaho Training Clearinghouse, including Assistive Technology

Other Information and Resources for Educators

- International Dyslexia Association; IDA Knowledge and Practice Standards for Teachers of Reading
- National Center on Improving Literacy
- Reading League; Reading League's Curriculum Evaluation Tool
- Center for Effective Reading Instruction
- Center for Intensive Intervention
- Florida Center for Reading Research; FCRR Rubric for Evaluating Reading Instructional Materials for K-5
- Southwest Educational Development Lab (SEDL)
- Barksdale Institute's Reading Universe
- Reading Rockets
- Meadows Center for Preventing Educational Risk

Other Resources for Parents

- Decoding Dyslexia, Idaho
- Wrightslaw
- John Corcoran Foundation
- Nemours Clinic
- Our Dyslexic Children
- One by One
- Understood.org

Federal Laws

- Individuals with Disabilities Educational Act (IDEA)
- Section 504 of the Rehabilitation Act
- Americans with Disabilities Act

APPENDICES

APPENDICES

- Appendix A: Guide to Screening and Diagnostic Measures
- Appendix B: Sample Scope and Sequence for Word Study, Reading, and Spelling
- Appendix C: Summary of IDA's Knowledge and Practice Standards for Teachers of Reading

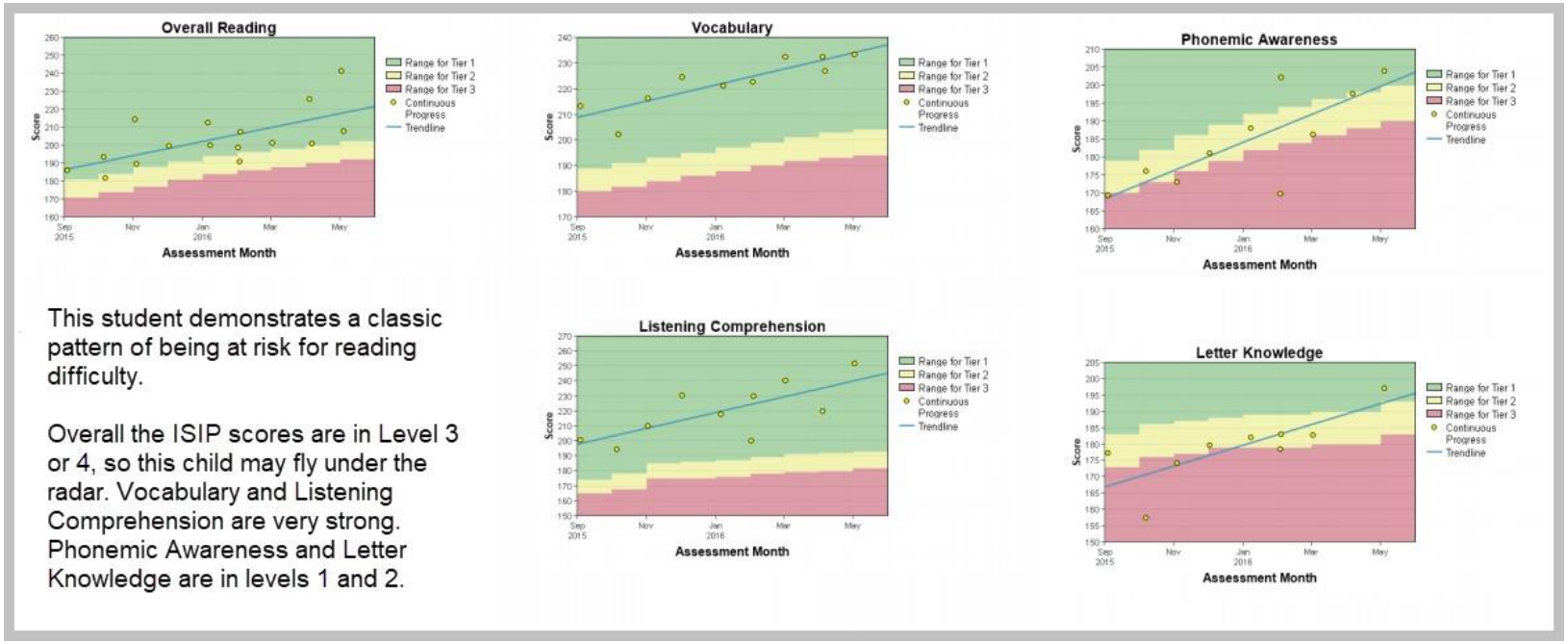
APPENDIX A: GUIDE TO SCREENING AND DIAGNOSTIC MEASURES

TIER I SCREENING, GRADES K-3

The Idaho Reading Indicator is the Tier I Screener for grades K-3. As the current IRI vendor, Istation offers the following guidance for school teams to use to review students' IRI Subtest data to identify students at risk for reading difficulty. Students whose IRI data show difficulties with accurate or fluent word recognition, poor spelling, and decoding abilities may be experiencing a deficit in the phonological component of language. These students may be demonstrating characteristics of dyslexia, and Tier II Diagnostic Measures should be administered.

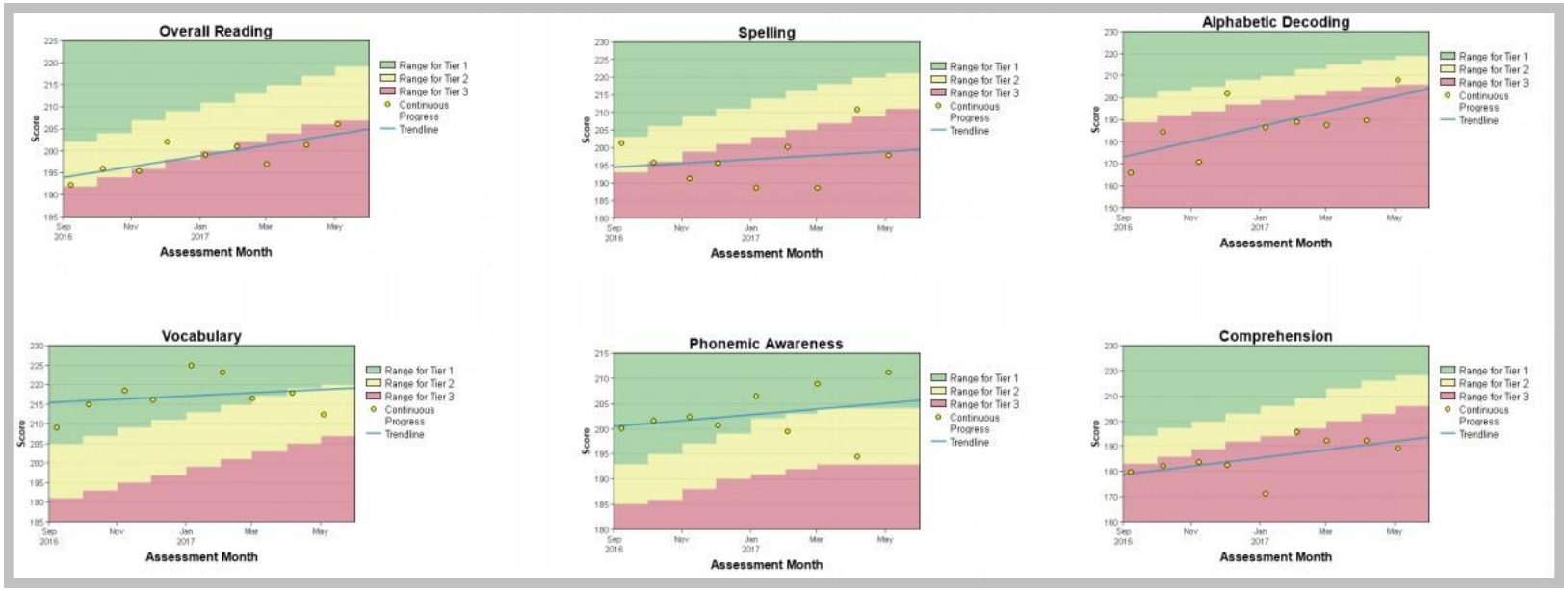
Kindergarten[1]

- The student scores higher on Listening Comprehension than on Phonemic Awareness and Letter Knowledge
- The student scores poorly on Phonemic Awareness and Letter Knowledge compared to other sub-tests. This indicates unexpectedness in performance based upon skill development.
- Some students at risk of reading difficulties will do well on Vocabulary, depending on their home environment
- These students are at a higher risk of being held back as teachers may think they just need more time



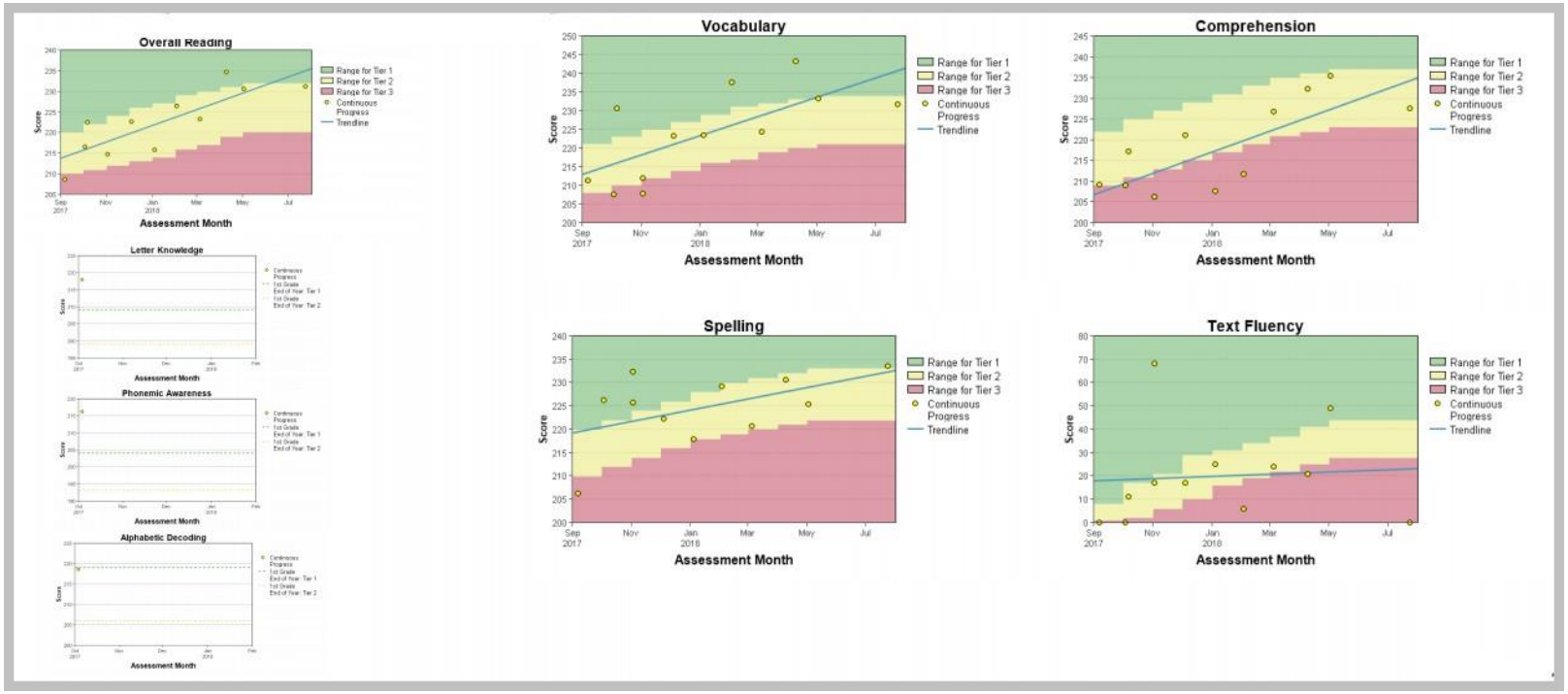
1st Grade[1]

- Student scores are low on 1 or 2 of the following sub-tests: Alphabetic Decoding, Phonemic Awareness, Spelling, and Comprehension but not in all sub-test areas. This indicates unexpectedness in performance.
  - Poor readers and students at risk of dyslexia will not gate out of Phonemic Awareness and Letter Knowledge by the winter benchmark
- Vocabulary percentile may be lower in first grade than in kindergarten



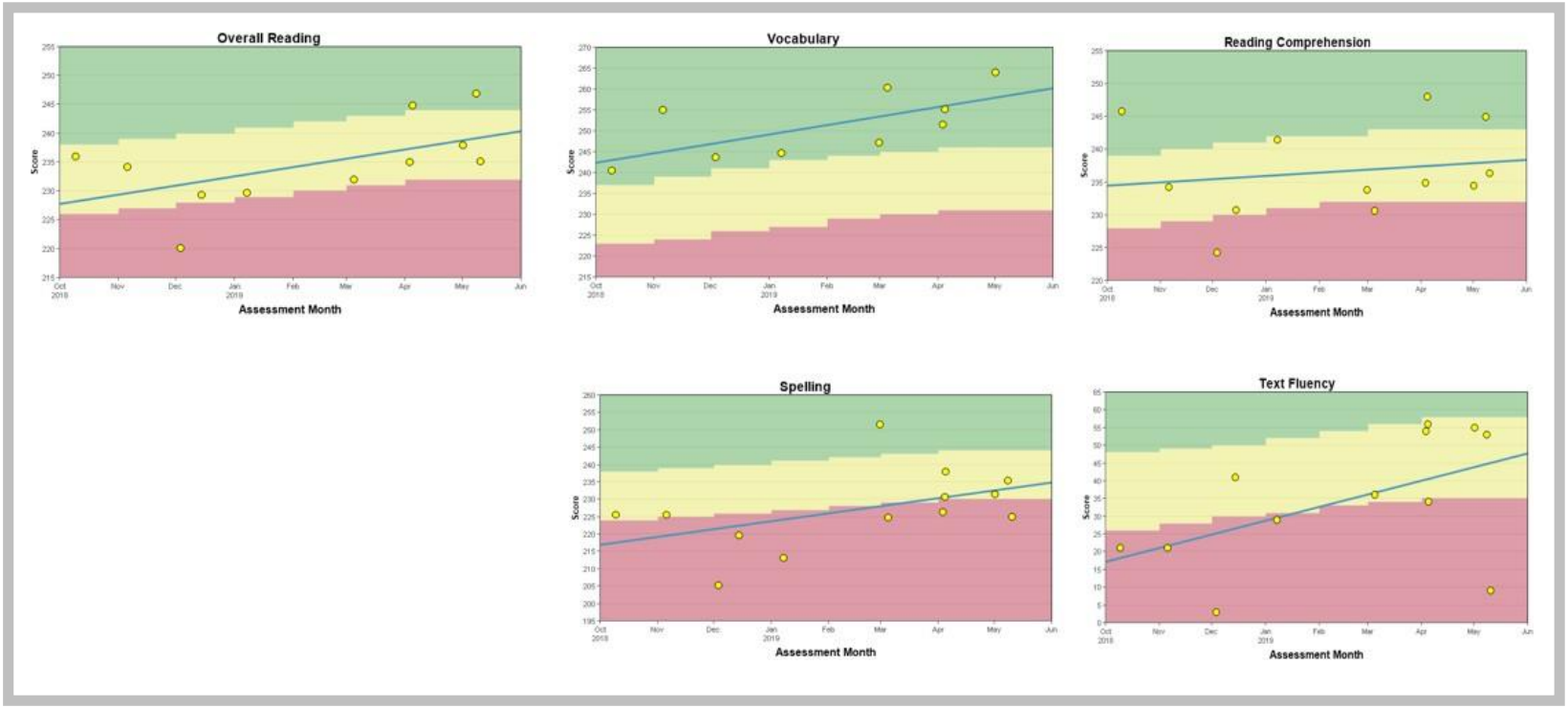
2nd Grade[1]

- Student scores lower on Comprehension, Spelling, and Text Fluency in relation to other sub-tests, including overall reading and/or vocabulary.
- The student may gate down into Alphabetic Decoding, Phonemic Awareness and/or Letter Knowledge



3rd Grade[1]

- Student scores lower on Comprehension, Spelling, and Text Fluency than in 2nd grade
- If Vocabulary was high in earlier grades, it may start to fall behind and slip in percentile rank. Vocabulary may continue to be an overall strength
- The student may gate down into Alphabetic Decoding, Phonemic Awareness and/or Letter Knowledge



[1] IStation, 2022

TIER II DIAGNOSTIC MEASURES, GRADES K-3

The following table is designed to assist you in using students' IRI subtest data to determine appropriate diagnostic measures. To clarify the interventions that should be included in a student's individual reading plan, review the subtests where the student's score was low (or lower than other areas), identify one or more diagnostic measure from the recommended list to administer, and review the resulting data.

Using IRI Subtest Data to Identify Appropriate Diagnostics for Grades K-3

IRI Subtest	Expected Subtest Grades	Related Skill	Notes	Tier II Diagnostic Measures
Phonemic Awareness	K-1	Phonological / Phonemic Awareness		• AIMSweb & AIMSweb Plus PSF (K-1) • DIBELS 6th and Next ISF (K) • DIBELS 6th and Next PSF (K-1) • DIBELS 8th PSF (K-1) • EasyCBM Phonemic Awareness (K-1) • Acadience Reading Diagnostic PA & WRD • FAST (K-1) • CORE Phonological Awareness • Phonological Awareness Skills Program - PASP (K-1) • Predictive Assessment of Reading – PAR (K) • Texas Primary Reading Inventory - TPRI (K-1) • Phonological Awareness Screening Test - PAST (K-1) • Phonological Awareness Skills Screener - PASS (K-1)
Letter Knowledge	K-1	Letter Naming Fluency		• AIMSweb & AIMSweb Plus LNF (K-1) • DIBELS 6th and Next LNF (K -1) • DIBELS 8th LNF (K-1) • EasyCBM Letter Names (K-1) • FAST (K) • CORE Phonics Surveys
Alphabetic Decoding	1	Phonics and decoding		• AIMSWeb & AIMSweb Plus LSF/NWF Assessment • DIBELS 6th and Next NWF • DIBELS 8th NWF

				• EasyCBM Letter Sounds • Acadience Reading Diagnostic PA & WRD • CORE Phonics Surveys • FAST • Predictive Assessment of Reading • Reading A-ZA: Alphabet Naming • Renaissance Phonics screener • Really Great Reading Decoding Survey • 95% Group PSI: Phonics Screener for Intervention
Spelling	1-3			• LETRS Diagnostic Spelling Survey • Test of Written Spelling (1-3)
Comprehension	1-3		Note: Students' listening comprehension will likely be higher than their reading comprehension; they may be able to retell stories told orally but not retell what they have read themselves.	• AIMSweb and AIMSwebPlus (1-3) • AIMSweb Maze (3) • DIBELS 8th (1-3) • DIBELS Next Daze (3) • MAZE (1) • Renaissance STAR Early Literacy (1-3) • Easy CBM, Reading Comprehension (2-3)
Text Fluency	1-3	Oral reading fluency		• AIMSweb Plus (1-3) • DIBELS 8th WRF & ORF (1-3) • DIBELS 6 and NEXT ORF (2-3) • EasyCBM Word Fluency/Passage Fluency (1-3) • FAST (1) • Renaissance STAR Early Literacy (1-2)
N/A	K-3	Rapid Automatic Naming	Note: K students may have difficulty in easily remembering the names of letters, digits, colors, or objects. By Grade 2, students will demonstrate issues remembering words.	• AIMSweb Plus • PRO-ED RAN/RAS • Acadience RAN

Note: Guidance regarding additional diagnostic measures to be given based on the IRI Vocabulary Subtest are not included, as it is common for students with characteristics of dyslexia to score higher in vocabulary than other subtests. Thus, it is not likely that students will need additional diagnostic measures in vocabulary either to determine if they are demonstrating characteristics of dyslexia or to plan interventions.

TIER I SCREENING, GRADES 4 & 5

At this time, Idaho does not have an identified state administered assessment to be used for Tier I screening for grades four and five. Thus, local education agencies (LEAs) should identify and use the tool they feel is most appropriate. Suggested resources are below.

Suggested Tier I Screening Resources for Grades 4 & 5

Screener	Phonological Awareness (PA)	Phonemic Decoding Efficiency	Encoding Ability	Sight Word Reading Efficiency	Admin Time	Print or Digital
Acadience Reading (formerly DIBELS Next)	X	X	X	X	2-9 min	Both
FastBridge CBMreading	X	X	X	X	20-35 min	Digital
mCLASS: Amplify Reading	X	X	X	X	5 min	Digital
STAR CBM	X	X	X	X	5-6 min total	Both
Phonological Awareness Literacy Screening-Plus (PALS Plus)	X	X	X	X	2-3 min tasks	Both
Istation Advanced Reading (4-8)			X		<30 min	Digital
PAST	X				1-20 min	Print

TIER II DIAGNOSTIC MEASURES, GRADES 4 & 5

The following table is designed to assist you in using students' screening data to determine appropriate diagnostic measures. To clarify the interventions that an individual student should receive, review the subtests where the student's score was low (or lower than other areas) on the screener, identify one or more diagnostic measures from the recommended list to administer, and review the resulting data.

Suggested Diagnostic Measures by Reading Skill for Grades 4 & 5

Reading Skill	Diagnostic Measures
Phonological / Phonemic Awareness	• Phonological Awareness Skills Program - PASP (4-5) • Phonological Awareness Skills Screener - PASS (4-12) • Phonological Awareness Skills Test - PAST (4-12) • Cool Tools/FAIR Informal Reading Assessments: Florida Center for Reading Research, FCRR (4-5) • Acadience Reading Diagnostic PA & WRD (4-6) • CORE Phoneme Segmentation Test (4-8)
Phonics / Decoding / Word Recognition	• Really Great Reading Decoding Survey (4-12) • CORE Phonics Survey (4-12) • 95% Group PSI: Phonics Screener for Intervention (4-8) • Cool Tools/FAIR Informal Reading Assessments: FCRR (4-5) • Basic Reading lnventory (BRI), Jerry Johns (4-12) • Renaissance Phonics Survey
Spelling	• Words Their Way (4-12) • LETRS Diagnostic Spelling Survey • Test of Written Spelling (4-5)
Comprehension	• AIMSWeb Maze (4-12) • AIMSweb Plus (4-12) • DIBELS Next Daze (4-6) • DIBELS 8th Maze (4-8) • EasyCBM Passage Fluency (4-6) • Cool Tools/FAIR Informal Reading Assessments: FCRR (4-12) • Curriculum Based Measures (4-5) • Basic Reading lnventory, Jerry Johns (4-12)

Text Fluency	• AIMSweb R-CBM Oral Reading Passage (4-12) • AIMSweb Plus (4-12) • DIBELS 6th and Next ORF (4-6) • DIBELS 8th (4-8) • EasyCBM Passage Fluency (4-6) • Cool Tools/FAIR Informal Reading Assessments: Florida Center for Reading Research (4-5) • Basic Reading lnventory, Jerry Johns (4-12)

APPENDIX B: SAMPLE SCOPE AND SEQUENCE FOR WORD STUDY, READING, AND SPELLING

Louisa Moats and Carol Tolman[1]

Note: This chart is based on customary placement in reading and spelling curricula. There is no one accepted scope and sequence in the field. Grade levels for reading and spelling are approximate and will vary in appropriateness, according to the achievement levels of the students. The progression is intended to move gradually from simple to more complex linguistic constructions.

Consistent Phoneme-Grapheme Correspondences			
Grapheme Type	**For Reading**	**For Spelling**	**Examples**
Predictable consonants: *m*, *s*, *t*, *l*; *p*, *f, c* (/k/), *n*; *b*, *r*, *j*, *k*; *v, g* (/g/), *w*, *d*; *h*, *y*, *z*, *x*	K	K	him, napkin
Predictable short vowels: /ă/, /ĭ/, /ŏ/, /ŭ/, /ĕ/ spelled with *a*, *i*, *o*, *u*, *e*	K	K–1	wet, picnic
Long vowel sounds associated with single letters *a*, *e*, *i, o*, *u*; open syllables in one-syllable words	K	K–1	me, he, we, be, so, no, hi
Consonant digraphs: *sh*, *ch*, *wh*, *th*, *ng*	K–1	1	chin, fish, then
Two-consonant blends: *qu*, *st*, *sm*, *sn*, *-st*, *-ft*, *-lp*; *sr*, *sl*, *cr*, *cl*, *tr*, *dr*, etc.	1	1–2	dragon, slaps
Three-consonant blends and blends with digraphs: *squ*, *str*, *scr*, *thr*, *shr*	2	2–3	<u>str</u>ong, <u>scr</u>ape

[1] Also published in L.C. Moats & C. Tolman (2018). *Language Essentials for Teachers of Reading and Spelling, 3rd Edition*. Lexia Learning.

Variable, More Challenging Phoneme-Grapheme Correspondences			
Grapheme Type	**For Reading**	**For Spelling**	**Examples**
Single consonants: /s/ = *c*, *s*; /z/ = *s, z*; /k/ = *k*, *c*, *-ck* after a short vowel; /g/ = *j*, *g*	1	1–2	result, cent, rock
Hard and soft *c* and *g* alternation, across a larger body of words	1	2–3	carry, center; girl, gentle
Final consonant blends with nasals: *nt*, *nd*, *mp*, *nk*	1	2–3	sink, sank, sunk; dump, tent
VCe long vowel pattern in single-syllable words	1	1	wage, theme, fine, doze, cute/rude
Vowel teams for long vowel sounds, most common: *ee*, *ea*; *ai*, *ay*; *oa*, *ow*, *oe*; *igh*	1	2	seek, meat, snow, boat, toe, stay, mail, fight
Vowel-r combinations, single syllables: *er*, *ar*, *or*, *ir*, *ur*	1	2	port, bird, turn, her
Digraphs *ph* (/f/), *gh* (/f/), *ch* (/k/ and /sh/)	2	2–3	phone, cough, school, machine
Other vowel-r combinations: *are*, *air*, *our*, *ore*, *ear*, *eer*, *ure*, etc.	2	2–3	hare, hair, for, four, fore, bear, heart
Diphthongs and vowels /aw/ and /oo/: *oi*, *oy*; *ou*, *ow*; *au*, *aw*; *oo*, *u*	1–2	2–3	toil, boyfriend, bout, tower, audio, claws, took, put
All jobs of *y* (as consonant /y/; as /ī/ on ends of one-syllable words like *cry*; as /ē/ on ends of multisyllabic words like *baby*; as /ĭ/ in a few words like *gym*, *myth*)	1	2	yellow, try, candy, gym
Silent letter combinations, Anglo-Saxon words	2	3	knew, calm, comb, ghost, write
The *-ild*, *-ost*, *-old*, *-olt*, *-ind* pattern	2	2	wild, most, cold, find
Irregular spellings of high-frequency words	K-3	K-3	they, enough, of, been, were, said, there

Six Syllable Types and Oddities in Multisyllable Words			
Syllable Type	**For Reading**	**For Spelling**	**Examples**
Closed: short vowel ending with consonant	1	2	sister, Sep – tember
Open: long vowel, no consonant ending	1	2	robot, behind, music
Vowel-consonant-e (VCe), long vowel sound	2	2	compete, suppose
Vowel-r combinations	2	2	por – ter, hurdle
Vowel teams, long, short, and diphthong vowels	2	3	meatloaf, neighbor, Toyland
Consonant-le (Cle), final syllables	2	3	eagle, stubble
Multisyllabic word construction and division principles: VC/CV, V/CV, VC/V, CV/VC	2–3	3	com – mit – ment, e – vent, ev – er – y, po – et
Oddities and schwa	2	3+	active, atomic, nation
Orthographic Rules and Generalizations			
Rule/Principle	**For Reading**	**For Spelling**	**Examples**
No word ends in *v* or *j*	1	2–3	have, love, move; wage, huge, ridge, dodge
Floss rule *(f, l, s* doubling)	1	1	stuff, well, miss, jazz
Consonant doubling rule for suffix addition	1	2–3	beginning
Drop silent *e* for suffix addition	1	2–3	scared, likable
Change *y* to *i* for suffix addition	1	2–3	studying, cried, candied

Other Aspects of Orthography			
Morpheme Construction	**For Reading**	**For Spelling**	**Examples**
Homophones	2	2–3	to, two, too
Contractions with *am*, *is*, *has*, *not*	1	2	I'm, he's, she's, isn't, don't
Contractions with *have*, *would*, *will*	2	3	I've, he'd, they'll
Possessives and plurals	1–3	1–3+	house's, houses, houses'; it's, its; hers, theirs
Basic Morphology (Anglo-Saxon and Latin)			
Morpheme Construction	**For Reading**	**For Spelling**	**Examples**
Compounds	1	2	sunshine, breakfast, fifty-one
Inflectional suffixes: inflectional suffix on single-syllable base words with no spelling change (e.g., *help*, *helps*, *helped*, *helping*)	1	1–2	walks, walking, walked, wanted, dogs, wishes; redder, reddest
Inflectional suffixes: inflectional suffix on single-syllable base words with spelling change	1–2	2–3	caring, loved, cries
Irregular past tense and plurals	1–3	1–3	ran, went, bent, left, sold; wolf, wolves; shelf, shelves
Common prefixes	1	2	un-, dis-, in-, re-, pre-, mis-, non-, ex-
Less common prefixes	2	3+	fore-, pro-, intra-, inter-, trans-, non-, over-, sub-, super-, semi-, anti-, mid-, ex-, post-
Common derivational suffixes	2	2–3	-y, -ly, -ful, -ment, -hood, -less, -ness, -er, -or , -en
Common Latin roots	3	3+	port, form, ject, spect, dict, tend, fer

APPENDIX C: SUMMARY OF IDA'S KNOWLEDGE AND PRACTICE STANDARDS FOR TEACHERS OF READING

STANDARD 1: FOUNDATIONS OF LITERACY ACQUISITION

1.1 Understand the (5) language processing requirements of proficient reading and writing: phonological, orthographic, semantic, syntactic, discourse.

1.2 Understand that learning to read, for most people, requires explicit instruction.

1.3 Understand the reciprocal relationships among phonemic awareness, decoding, word recognition, spelling, and vocabulary knowledge.

1.4 Identify and explain aspects of cognition and behavior that affect reading and writing development.

1.5 Identify (and explain how) environmental, cultural, and social factors contribute to literacy development.

1.6 Explain major research findings regarding the contribution of linguistic and cognitive factors to the prediction of literacy outcomes.

1.7 Understand the most common intrinsic differences between good and poor readers (i.e., linguistic, cognitive, and neurobiological).

1.8 Know phases in the typical developmental progression of oral language, phoneme awareness, decoding skills, printed word recognition, spelling, reading fluency, reading comprehension, and written expression.

1.9 Understand the changing relationships among the major components of literacy development in accounting for reading achievement.

STANDARD 2: KNOWLEDGE OF DIVERSE READING PROFILES, INCLUDING DYSLEXIA

2.1 Recognize the tenets of the (2003) IDA definition of dyslexia, or any accepted revisions thereof.

2.2 Know fundamental provisions of federal and state laws that pertain to learning disabilities, including dyslexia and other reading and language disability subtypes.

2.3 Identify the distinguishing characteristics of dyslexia.

2.4 Understand how reading disabilities vary in presentation and degree.

2.5 Understand how and why symptoms of reading difficulty are likely to change over time in response to development and instruction.

STANDARD 3: ASSESSMENT

3.1 Understand the differences among and purposes for screening, progress-monitoring, diagnostic, and outcome assessments.

3.2 Understand basic principles of test construction and formats (e.g., reliability, validity, criterion, normed).

3.3 Interpret basic statistics commonly utilized in formal and informal assessment.

3.4 Know and utilize in practice well-validated screening tests designed to identify students at risk for reading difficulties.

3.5 Understand/apply the principles of progress-monitoring and reporting with Curriculum-Based Measures (CBMs), including graphing techniques.

3.6 Know and utilize in practice informal diagnostic surveys of phonological and phoneme awareness, decoding skills, oral reading fluency, comprehension, spelling, and writing.

3.7 Know how to read and interpret the most common diagnostic tests used by psychologists, speech-language professionals, and educational evaluators.

3.8 Integrate, summarize, and communicate (orally and in writing) the meaning of educational assessment data for sharing with students, parents, and other teachers.

STANDARD 4: STRUCTURED LITERACY INSTRUCTION

Substandard A: Essential Principles and Practices of Structured Literacy Instruction

4A.1 Understand/apply in practice the general principles and practices of structured language and literacy teaching, including explicit, systematic, cumulative, teacher-directed instruction.

4A.2 Understand/apply in practice the rationale for multisensory and multimodal language-learning techniques.

4A.3 Understand rationale for/Adapt instruction to accommodate individual differences in cognitive, linguistic, sociocultural, and behavioral aspects of learning.

Substandard B: Phonological and Phonemic Awareness

4B.1 Understand rationale for/identify, pronounce, classify, and compare all the consonant phonemes and all the vowel phonemes of English.

4B.2 Understand/apply in practice considerations for levels of phonological sensitivity.

4B.3 Understand/apply in practice considerations for phonemic-awareness difficulties.

4B.4 Know/apply in practice consideration for the progression of phonemic-awareness skill development, across age and grade.

4B.5 Know/apply in practice considerations for the general and specific goals of phonemic-awareness instruction.

4B.6 Know/apply in practice considerations for the principles of phonemic-awareness instruction: brief, multisensory, conceptual, articulatory, auditory-verbal.

4B.7 Know/apply in practice considerations for the utility of print and online resources for obtaining information about languages other than English.

Substandard C: Phonics and Word Recognition

4C.1 Know/apply in practice considerations for the structure of English orthography and the patterns and rules that inform the teaching of single- and multisyllabic regular word reading.

4C.2 Know/apply in practice considerations for systematically, cumulatively, and explicitly teaching basic decoding and spelling skills.

4C.3 Know/apply in practice considerations for organizing word recognition and spelling lessons by following a structured phonics lesson plan.

4C.4 Know/apply in practice considerations for using multisensory routines to enhance student engagement and memory.

4C.5 Know/apply in practice considerations for adapting instruction for students with weaknesses in working memory, attention, executive function, or processing speed.

4C.6 Know/apply in practice considerations for teaching irregular words in small increments using special techniques.

4C.7 Know/apply in practice considerations for systematically teaching the decoding of multisyllabic words.

4C.8 Know/apply in practice considerations for the different types and purposes of texts, with emphasis on the role of decodable texts in teaching beginning readers.

Substandard D: Automatic, Fluent Reading of Text

4D.1 Know/apply in practice considerations for the role of fluent word-level skills in automatic word reading, oral reading fluency, reading comprehension, and motivation to read.

4D.2 Know/apply in practice considerations for varied techniques and methods for building reading fluency.

4D.3 Know/apply in practice considerations for text reading fluency as an achievement of normal reading development that can be advanced through informed instruction and progress-monitoring practices.

4D.4 Know/apply in practice considerations for appropriate uses of assistive technology for students with serious limitations in reading fluency.

Substandard E: Vocabulary

4E.1 Know/apply in practice considerations for the role of vocabulary development and vocabulary knowledge in oral and written language comprehension.

4E.2 Know/apply in practice considerations for the sources of wide differences in students' vocabularies.

4E.3 Know/apply in practice considerations for the role and characteristics of indirect (contextual) methods of vocabulary instruction.

4E.4 Know/apply in practice considerations for the role and characteristics of direct, explicit methods of vocabulary instruction.

Substandard F: Listening and Reading Comprehension

4F.1 Know/apply in practice considerations for factors that contribute to deep comprehension.

4F.2 Know/apply in practice considerations for instructional routines appropriate for each major genre: informational text, narrative text, and argumentation.

4F.3 Know/apply in practice considerations for the role of sentence comprehension in listening and reading comprehension.

STANDARD 5: PROFESSIONAL DISPOSITIONS AND PRACTICES

5.1 Strive to do no harm and to act in the best interests of struggling readers and readers with dyslexia and other reading disorders.

5.2 Maintain the public trust by providing accurate information about currently accepted and scientifically supported best practices in the field.

5.3 Avoid misrepresentation of the efficacy of educational or other treatments or the proof for or against those treatments.

5.4 Respect objectivity by reporting assessment and treatment results accurately, and truthfully.

5.5 Avoid making unfounded claims of any kind regarding the training, experience, credentials, affiliations, and degrees of those providing services.

5.6 Respect the training requirements of established credentialing and accreditation organizations supported by CERI and IDA.

5.7 Avoid conflicts of interest when possible and acknowledge conflicts of interest when they occur.

5.8 Support just treatment of individuals with dyslexia and related learning difficulties.

5.9 Respect confidentiality of students or clients.

5.10 Respect the intellectual property of others.

SUBJECT

Addition of Territory to College of Southern Idaho Community College District

APPLICABLE STATUTE, RULE, OR POLICY

Sections 33-2103 - 05, Idaho Code

BACKGROUND/DISCUSSION

Section 33-2105, Idaho Code, provides that "any territory not in an existing community college district may become a part of a community college district by a [simple majority] vote of the school district electors resident of said territory …." (Note: the term "territory" is undefined). To initiate the process, "a petition signed by not less than one hundred (100) school district electors of the territory proposed to be added to the community college district, or twenty percent (20%) of the school district electors within the territory, whichever is the lesser, describing the boundaries of the territory, and a true copy thereof, shall be filed with the board of trustees of the community college district."

The community college board of trustees must review the petition and send the petition and its recommendation to the State Board. If the State Board approves the petition, it must notify the board of trustees of the community college district and the board of county commissioners of the home county of the community college district.

The College of Southern Idaho (CSI) Board of Trustees received a petition of sufficient electors in Elmore County to join the CSI Community College District (CSI District). On August 31, 2022, the County Clerk of Elmore County certified the signatures as those of eligible electors. "The CSI Board of Trustees voted on November 14, 2022, to unanimously endorse the petition to the State Board, acknowledging that the underlying statute relies upon an ultimate vote of the people to determine a final outcome." (Attachment 3). The CSI Board of Trustees' recommendation was received by the State Board Office on November 15, 2022.

Section 33-2105, Idaho Code, provides that the State Board shall consider a petition to join an existing community college district "as it is required to consider a petition for the formation of a community college district."

Idaho Code § 33-2103, sets forth minimum requirements for the formation of a community college district, as follows:

1) The community college district must contain the area, or any part thereof, of four (4) or more school districts and the area or any part thereof, of one (1) or more counties;
2) Aggregate enrollment in grades nine (9) through twelve (12) is not less than 2,000 students; and
3) The market value of real and personal property value of the proposed district must not be less than $100,000,000.

The statute further directs that "the state board of education in considering a petition filed pursuant to Section 33-2104, Idaho Code, shall verify all the above requirements, as well as determine the number of the students expected to attend and the facilities available, or to be made available, for operation of the school."

In addition, Section 33-2104, Idaho Code, requires the Board to review the following information in determining whether to approve any petition:

1) Existing postsecondary opportunities within the proposed district;
2) Number of prospective students for the proposed community college;
3) Financial viability of the new community college with income from tuition and sources as provided by law.

Section 33-2103, Idaho Code Requirements:

1) Number of Local School Districts
The area of the proposed territory to add to CSI's district includes the area (in whole or in part) of four school districts:

Bliss Joint School District #234
Bruneau-Grandview Joint School District #365
Glenns Ferry Joint School District #192
Mountain Home School District #193

2) Aggregate Enrollment of High School Students

	2018-19	2019-20	2020-21	2021-22	2022-23
Bliss Joint	35	40	35	36	39
Bruneau-Grandview Joint	95	101	99	104	85
Glenns Ferry	123	123	127	119	119
Mountain Home	1068	1075	1001	1033	1040
TOTAL	**1321**	**1339**	**1262**	**1292**	**1283**

3) Taxable Market Value
The Elmore County real and personal property values as of September 2022 were $2,631,416,666 (source Idaho Tax Commission).

4) Facilities Available
CSI does not currently have a center or facility in Elmore County. Courses could be delivered online and/or in high schools or other community facilities in Elmore County depending on community demand and space availability.

Section 33-2104, Idaho Code Requirements:

1) Existing Opportunities for Postsecondary Education
Section 33-2101, Idaho Code, provides "for the orderly establishment and growth of [community] colleges, a statewide system of six [community] college

areas is hereby created. … The State Board of Education shall only approve the existence of one centrally located district in any area until the enrollment of such junior college therein exceeds 1000 full time day students a year from within the area." The statute splits Elmore County between Area 3 and Area 4. Board Policy III.Z. establishes "service regions for the institutions based on the six geographic areas identified in Section 33-2101, Idaho Code. A Designated Institution shall have the Service Region Program Responsibility to assess and ensure the delivery of all educational programs and services necessary to meet the educational and workforce needs within its assigned service region.

Region III shall include the area within Area No.3 under Section 33-2101, Idaho Code. Boise State University and College of Western Idaho are the Designated Institutions serving undergraduate needs. Boise State University is the Designated Institution serving graduate education needs. Boise State University and College of Western Idaho are the Designated Institutions serving applied baccalaureate degree needs.

Region IV shall include the area within Area No.4 under Section 33-2101, Idaho Code. Idaho State University and College of Southern Idaho are the Designated Institutions serving undergraduate needs. Idaho State University is the Designated Institution serving the graduate education needs, with the exception that Boise State University will meet undergraduate and graduate business program needs. Idaho State University and College of Southern Idaho are the Designated Institutions serving applied baccalaureate degree needs."

2) Projected Enrollment

CSI provided the following as a plausible projection. Taking the high school graduating students for 2021 from within Elmore County (325) as a base and applying a 45 percent college-going rate for Elmore County, then 325*.45=146 learners.[1] Forty-one percent of Elmore County residents lack a high school diploma or possess an equivalent. Another 30 percent have some college with an associate degree, or no degree. CSI's goal would be 500 unique learners served from Elmore County annually through dual enrollment, lower-division instruction, engaging non-traditional learners in flexibly scheduled programs and through workforce development engagement/training for incumbent workers.

3) Financial Viability

A process that may ultimately result in a positive vote by Elmore County to join the community college district would yield an increase of $2,183,964 to the overall collections of the CSI community college district. (The calculation is based on 2021 valuations for Elmore County and the 2021 levy rate.) Tuition revenue from courses offered in Elmore County would also be available to the

[1] The one-year college-going rate for CSI from within the Magic Valley (44 percent for Jerome County and 36 percent from Twin Falls County). Elmore County's college-going rate for CSI is currently 32 percent.

College beyond the levy collections, and the College would seek increases to its CTE allocations which would provide support for the full cost of instruction for CTE-instructional activities. An expansion of the community college district to incorporate Elmore County would not involve undue "mission creep" since programs and activities would be predicated on the County providing a way to support the ongoing costs of activities within the County. As a point of reference, CSI expends approximately $211,000 annually to provide for the non-instructional personnel at the Mini-Cassia Center in Burley. Using a similar service model approach within Elmore County, and assuming that there would be ongoing facility costs, the annual projected collections from Elmore County would be sufficient to support activities. Moreover, the CSI administration and the Board of Trustees can establish that the service model for Elmore County not exceed the available revenue. There would be personnel costs for employees who would work in Elmore County, and there would be sufficient resources from the levy revenue to support those anticipated costs. Back-office functions can be scaled since those are shared services already made available to off-campus locations (e.g. Mini-Cassia). There may be need to scale personnel on the Twin Falls campus to meet enrollment increases, but there would be tuition revenue and future enrollment workload adjustments from the state to support costs.

Pursuant to Idaho Code § 33-2110A, a student residing outside of a community college district that attends any community college is charged out-of-district tuition, which is paid by a student's resident county up to a lifetime maximum of $3,000. The out-of-district tuition rate is $50 per credit hour.

IMPACT

Approval of the resolution as provided in Attachment 3 will allow for an election to be called in Elmore County for creation of a community college district pursuant to the requirements of Sections 33-2105 and 34-106, Idaho Code.

Section 33-2104A, Idaho Code, provides that "a proposal to redefine the boundaries of trustee zones of a community college district shall be initiated by its board of trustees at the first meeting following … the electors' approval of the addition of territory pursuant to Section 33-2105, Idaho Code. The board of trustees shall submit the proposal to the state board of education within one hundred twenty (120) days following the … election."

ATTACHMENTS

Attachment 1 – Petition and Certification of Signatures Page #
Attachment 2 – CSI Board of Trustees Recommendation Page #
Attachment 3 – Resolution Page #

STAFF COMMENTS AND RECOMMENDATIONS

Staff finds that the petitioners and CSI Board of Trustees satisfied the requirements for the addition of territory to a community college district set forth in Section 33-

2105, Idaho Code. Should the voters approve the addition of Elmore County to the CSI District the college district will overlap with the service area for College of Western Idaho established in Section 33-2201, Idaho Code. The Board will need to then amend the area boundaries established in Section 33-2201, Idaho Code.

Staff recommends approval of the petition.

BOARD ACTION

I move to approve the Resolution set forth in Attachment 3 recommending the addition of territory made up of the boundaries of Elmore County to the current territory of the College of Southern Idaho community college district.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

CERTIFICATION

OF

SIGNATURES

STATE OF IDAHO)
) SS.
COUNTY OF ELMORE)

I, Shelley Essl, County Clerk of Elmore County, Idaho, do hereby certify that **108 (One hundred eight)** signatures on this petition to **Create A Community College District** are those **of qualified electors**, and, if applicable, qualified electors in the Glenns Ferry School District.

SEAL

ELMORE COUNTY, IDAHO
SEAL
AUDITOR & RECORDER

SHELLEY ESSL
ELMORE COUNTY CLERK

Kelsey Cheney

KELSEY CHENEY
DEPUTY CLERK

8/31/2022
Date

GFSD
Voters

PETITION TO CREATE A COMMUNITY COLLEGE DISTRICT

We, the undersigned citizens and qualified electors of the State of Idaho, in and for Elmore County, respectfully petition for the creation of the following:

1. A community college district to support and supervise the College of Southern Idaho.
2. That said, the proposed community college district encompasses all of Elmore County, Idaho.

Each of the following signers certifies that: 1) I have personally signed this petition and 2) I am registered to vote under the name signed below, and
3) I am registered to vote at the address listed below which is in Elmore County, Idaho.

	Date	Printed Name	Signature	Voting Address/City
1	~~7-16-2022~~	~~M. Louise Lisle~~	~~M. L. Lisle~~	~~4249 N. Washington King Hill~~
✓ 2	7-16-22	Melinda Lisle	[signature]	4294 N Washington King Hill
✓ 3	7-16-22	Clay Pollar	[signature]	355 N. Alder GF
✓	7-16-22	Darwin Bybee	[signature]	461 N Liberty Dr KH
✓	7-16-22	Jean Bybee	[signature]	461 N Liberty Dr KH
✓	7-16-22	Brock Lenz	[signature]	761 S. Boise St.
✓	7-16-22	Sydney Goeckner	[signature]	124 N. Sailor Cr Rd GF
✓	7-16-22	Kevin King	[signature]	201 N Bronco Ln KH
✓	7-16-22	Sarah Swan	[signature]	240 E. Syringa, GF
NRX	7-16-22	C. Williams	Carol Williams	1217 E Cleveland GF
NRX	7-16-22	K. Wills	Kimra Wills	289 W. Arthur GF
✓	7-16-22	Jancane Butler	[signature]	P.O. Box 146 Kenny Ferry
✓	7-16-22	W. Alfredson	[signature]	353 W Madison Ave GF
✓	7-16-22	Amy Alfredson	Amy Alfredson	145 N 18 E, MH
✓	7-16-22	Joann Heath	Joann Heath	4149 N Id Ave KH
NRX	7-16-22	Marlena Vallard	Marlena Vallard	9722 old hiway 30 Hammé
6 addresx	7-16-22	Sunrise McKenzie	Sunrise McKenzie	
NRX	7-16-22	Cindy Sherman	Cindy D. Sherman	4128 Douglas King Hill 83633

12 - 11 GF

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SEAL
AUDITOR & RECORDER

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ELMORE COUNTY CLERK

KELSEY CHENEY
DEPUTY CLERK

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✓	7-16-22	Jean Bybee	Jean Bybee	461 N Liberty Dr KH
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✓	7-16-22	Sydney Goeckner	Sydney Goeckner	124 N. Sailor Cr Rd GF
✓	7-16-22	Kevin King	K King	201 N Bronco Ln KH
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12 - 11 GF

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3) I am registered to vote at the address listed below which is in Elmore County, Idaho.

Date	Printed Name	Signature	Voting Address/City
✓8-15-22	Stacy Dickson		9405 Jade W Hammett ID 83627
15 Aug 22 (x moved)	Sarah Thomas	S Thomas	PO Box 6 GF 83623
✓15 Aug 22	Cynthia Sherman	C Sherman	4128 Douglas King Hill 83633

2

GFSD

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Date	Printed Name	Signature	Voting Address/City
8/15/2022	Jen Hershee	Jen Hershee	63 N Snake River Glenns Ferry ID 83623
8/15/2022	Kelli McHone	Kelli McHone	924 E. Garfield Ave. Glenns Ferry, ID 83623
8/15/22	Liza Martin	Liza Martin	360 W. Madison Ave GF, ID 83623
8/15/22	Amy Hill	Amy Hill	582 W. 1st Ave G.F. ID 83623

4

Glenns Ferry PSD

PETITION TO CREATE A COMMUNITY COLLEGE DISTRICT

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3) I am registered to vote at the address listed below which is in Elmore County, Idaho.

Date	Printed Name	Signature	Voting Address/City
8.15.22	Sonia Wadewitz	Sonia Wadewitz	274 W. Idaho Ave
8/15/22	maria Hurtado	Maria Hurtado	7466 old High way 30 #3
8/15/22	Melanie McLean	Melanie McLean	437 W Madison Ave.
8-15-22	Lorinda Meeker	Lorinda Meeker	565 E Garfield Ave
8-15-22	Jennifer Reece		7853 W Ringert Hammett
8-15-22	Carie Jackson	Carie Jackson	149 W. Washington P.O. Box 234 GF
8-15-22	Lu. Titus		149 W. Washington E.F.
8.15.22	natasha King	Natasha King	201 n Bronco Ln King Hill, ID 83633
8-15-22	Heather Muddiman	Heather Muddiman	3361 W. Crane Rd King Hill Id
8-15-22	Ismael Re		429 E 5th Glenns Ferry ID
8-15-22	Guadalupe Nolasco	Guadalupe N	10352 E Gopher Knoll King Hill Id 83633
8/15/22	Makeyla Jo Hersey		1450 S. penny Ln. King Hill, ID 83633
8/15/22	Rose Shenk	Rose Shenk	592 S. Raspberry Ln Hammett ID 83627
8/15/22	Heather Espino		286 E Syringa Ave Glenns Ferry ID 83623
8/15/22	Sarah Moore	Sarah Moore	295 N Commerce
8/15/22	Shannon Worton	Shannon Worton	185 N. Kansas Ave. GF
8/15/22	Candice Hill		599 N. Elmore Ave GF
8-15-22	Patrick Dickson		940 S. Sade Way

Glenns Ferry SD

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	Date	Printed Name	Signature	Voting Address/City
✓	8/15/2022	Brenna Fisher	[signature]	513 S Thacker Rd Hammett, ID
✓	8/15/2022	Emily Wright	[signature]	786 E 1st Ave #9 Glenns Ferry ID 83623
XNR	8/15/22	Kandace Titus	[signature]	64 W. 2nd Ave GF, ID 83623
✓	8/15/22	Dustin Johnson	[signature]	9863 Old Hwy 30 Hammett ID
✓	8/15/2022	BRIAN BECKLEY	[signature]	9143 W Osprey St Hammett Idaho 83627
✓	8/15/22	Traci Beckley	[signature]	9143 W Osprey St Hammett, ID 83627
✓	8/15/22	Dwayne Rinclear	[signature]	437 W Madison Ave Glens Ferry Id
✓	8/15/22	Bob Schumacher	[signature]	47 N ELMORE St.
XNR	8/15/22	Jennetta Rea	[signature]	2957 E Pasadena Valley rd Kingshill, 83633
✓	8/15/22	Corey Ardkan	[signature]	9141 W Church St Hammett ID 83627
✓	8/15/2022	Jordan Thomas	[signature]	812 West Garfield Glenns Ferry Id 83623
✓	8/15/2022	ALAN KRANZ	[signature]	1033 W. NEW VIEW DR HAMMETT
✓	8/15/2022	Mark Merrett	[signature]	996 W. Madison Ave GF 83623
✓	8-15-2022	Kevin Gonzalez	[signature]	584 S. Owyhee St. Glenns Ferry
✓	8-15-2022	Marlene Bauman	[signature]	7601 South Grindstone Glenns Ferry, Id
XNR	8-15-2022	Shon Thompson	[signature]	630 N BANNOCK ST. GLENNS FERRY
✓	8-15-2022	Joyce Humphreys	[signature]	609 S. Humphreys Rd. HAMMETT
XNR 18	8-15-22	Tina Schelinder	[signature]	8728 Old Hwy 30 #32 Hammett

14

GLENNS FERRY SD VOTERS

PETITION TO CREATE A COMMUNITY COLLEGE DISTRICT

We, the undersigned citizens and qualified electors of the State of Idaho, in and for Elmore County, respectfully petition for the creation of the following:

1. A community college district to support and supervise the College of Southern Idaho.
2. That said, the proposed community college district encompasses all of Elmore County, Idaho.

Each of the following signers certifies that: 1) I have personally signed this petition and 2) I am registered to vote under the name signed below, and
3) I am registered to vote at the address listed below which is in Elmore County, Idaho.

	Date	Printed Name	Signature	Voting Address/City
✓	7-14-2022	Darlene R Adams	Darlene R Adams	221 S. Main Ave Hammett, Id 83627
✓	7-15-2022	Julia E Heath	Julia E Heath	same
✓	7-15-2022	Dorothy Drake	Dorothy Drake	481 N Liberty Dr King Hill ID 83633
✓	7-15-2022	Christopher Nichols	[illegible]	5567 E. Henry Jones Rd, King Hill ID 83633
XNR	7-16-2022	Rick Wooton	[illegible]	2286 S. Pruett Rd
✓	7-16-22	Jose Guerrero	[illegible]	594 N. Atlantic Glenns Ferry Id 83623
✓	7-16-22	Jared Zito	[illegible]	8895 W Spaulding RD Hammett ID
X moved	7-16-22	Amber Rodgers	Amber Rodgers	150 W Cleveland Glenns Ferry
✓	7-16-22	Sammy White	S. White	678 W. Elmore Glenns Ferry, ID
✓	7-16-22	Patricia Hernandez	[illegible]	5775 E Cabin LN King Hill ID 83633
✓	7-16-22	Tim Fenwick	[illegible]	486 Frog Follow 83633
✓	7-16-22	Keyton Cook	[illegible]	644 East Cleave Land 83623
✓	7-16-22	Carson Grigg	[illegible]	70 W Harrison ave Glenns Ferry ID 83623
X moved	7-16-22	Mathew Carlon	[illegible]	114 E Garfield Ave Glenns Ferry
✓	7-16-22	Kathy L Huber	[illegible]	PO Box 216 Glenns Ferry
✓	7-16-22	Stacie Pollard	Stacie Pollard	355 N. Alder Lane Glenns Ferry, ID 83623
✓	7-16-22	KAREN FRANK	Karen Frank	4105 E Montgomery Rd King Hill, Id 83633
18 ✓	7-16-22	Pamela Johnson	Pamela [illegible]	623 S. Cedar Ave Glenns Ferry ID

15

PETITION TO CREATE A COMMUNITY COLLEGE DISTRICT

We, the undersigned citizens and qualified electors of the State of Idaho, in and for Elmore County, respectfully petition for the creation of the following:

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Date	Printed Name	Signature	Voting Address/City
*Not Valid 7-12-22	Candy VanNorman		5043 E Ruberry Rd King Hill
✓ 7/12/22	Steven VanNorman		5043 E Ruberry Rd King Hill ID 83633
✓ 7/12/22	Hersy, Larry L Jr.		1451 S Penny Lane King Hill Id 83633
*NR 7/12/22	Butch Baker	Butch Baker	441 N Bannock ST Glenns Ferry
*NR 12 JUL 2022	Emily Conard Bland	Emily Conard Bland	2395 E Little Basin RD KING HILL ID 83633
✓ 12 JUL 2022	Gregory M. Bland	Gregory M Bland	2395 E Little Basin Rd King Hill ID 83633
✓ 7-11-22	Kristie Fary	Kristie Fary	190 N. Cobblestone Rd King Hill
✓ 7-15-22	Todd J Clark	Todd J Clark	644 E. Cleveland GF
*moved 7/15/22	Gary McCrea		1190 1st Glenns Fe
*NR 7/15/22	Jim Dillard	Jim Dillard	5520 E Bank ST King Hill ID
NR *moved ✓ 7-15-22	Tracy Reece	Tracy Reece	514 E 1st GF Idaho
*NR 7-15-22	Lucas Longstaff	Lucas Longstaff	434 N. Mesa Est. King Hill, ID 83633
*NR 7-15-22	Roland Greer	Roland Greer	94 Wilder Glenns Ferry Id 83623
NR * ✓ 7-15-22	Sharon Wean	Sharon Wean	80 N. Alton GF Ida 83623
✓ 7/15/22	Tamara Shenk	Tamara Shenk	5246 E King Hill Front 8363
✓ 7/15/22	Ray Dell Bosh	Ray D Bosh	5613 E. Main ST. King Hill Id 83633
✓ 7/15/22	Nadine Cook	Nadine Cook	644 E Cleveland Ave Glenns Ferry ID 83623
✓ 7/15/22	Melinda Sterling	Melinda Sterling	118 E 4th St Glenns Ferry ID 83623

9

GLENNS FERRY VOTERS
108 signed

PETITION TO CREATE A COMMUNITY COLLEGE DISTRICT

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3) I am registered to vote at the address listed below which is in Elmore County, Idaho.

	Date	Printed Name	Signature	Voting Address/City
1	7/16/22	Laurel Lenz	Laurel Lenz	761 S Boise St Glenns Ferry, Id 83623
2	7/16/22	Samantha Lenz	Samantha Lenz	761 S Boise St Glenns Ferry
#moved 3	7/16/22	Sandy Mills	Sandy Mills	7047 E Chafin Rd King Hill ID 83633
4	7/16/22	Pat Order	Patricia A Order	127 N. Elmore Ave Glenns Ferry
5	7/16/22	John Order	John Order	127 N ELMORE GLENNS FERRY
6	7/16/22	Nicki Blakeslee	Nicki Blakeslee	604 N Medbury Hill Dr Hammett Id 83627
7 no address not valid	7/16/22	Rick Hance	Rick Hance	19 E Cleveland GF, ID 83623
	7/16/22	Cliff Lisle	Cliff Lisle	
9	7/16/22	Darlene Owen	Darlene Owen	1959 SE Rose Pl GF
10	7/16/22	Sally wolfe	Sally wolfe	475 S Salt Creek RD. GF.
11	7/16/22	APRIL WOOTAN	April Wootan	2220 S. Pivetti Rd King H. 83633
#moved 12	7/16/22	Jessica Howard	Jessica Howard	8844 W Spangler Hammett ID 83627
#moved 13	7/16/22	Jose Gutierrez	Jose Gutierrez	~~Glenns Ferry~~ 385 S. Commercial Glenns Ferry 83623
#moved 14	7/16/22	Kendall Mackey	Kendall Mackey	50 E Arthur Glenns Ferry
#moved 15	1-16-22	Eric Stewart	Eric Stewart	50 E Arthur Glenns Ferry
16	7/16/22	Stephanie Hansen	Stephanie Hansen	49 W Garfield Ave Glenns Ferry, ID 83623
17	7/16/22	Christine Wootan	Christine Wootan	Glenns Ferry
18	7/16 22	Wesley R Wootan	Wesley R Wootan	Glenns Ferry Id

12

2680 E Wootan Lane
King Hill Idaho 83633

PETITION TO CREATE A COMMUNITY COLLEGE DISTRICT

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3) I am registered to vote at the address listed below which is in Elmore County, Idaho.

Date	Printed Name	Signature	Voting Address/City
7-2-22	Harlyn Marks	Harlyn Marks	695 NW Colthorp Dr
7-2-22	Cheryl Wagner	Cheryl Wagner	695 NW Colthorp Dr
7-2-22	Reginald L Pierce Jr	Reginald L Pierce	418 Oak Court
7-2-22	Misty Pierce	Misty Pierce	418 Oak Ct
7-2-22	Matthew Munson		1245 Garrett ST Mtn Home
7.2.22	Ronald Allen		825 Gregory LN
2 July 2022	ERIKA Emkey	Erika Emkey	730 SW Nugget St. 83647
2 July 2022	Anna Burger		8529 Opell Loop MHAFB
2 July '22	Ryan Burger		11
2 July 22	Kumunti Jordan		8930B Raymond Smart Circle MHAFB
2 July 22	Katie Jordan	Katie Jordan	8930B Raymond Smart Cir MHAFB, ID
7-2-22	Jennifer Murphy		970 N 16 E Mtn Home ID 83647
7-2-22	Nicholas Fogle		8969A James Taylor Cir MHAFB
7-2-22	Ari Fogle		8969A James Taylor Cir MHAFB
7-2-22	Mark Merritt		1639 Simco RD Boise Id 83716
7/2/2022	Sara Huskey	Sara Huskey	965 McKenna Dr, Mtn Home, ID 83647
7/2/22	Braeden Johnson		965 McKenna Dr. Mtn Home, ID 83647
7-2-22	Lizbeth Duarte		68 n Parkside Dr Glenns Ferry, ID 83623
7-2-22	Bobby Ashcraft		1335 Juniper St. 83647
1-2-22	Vonda Hudd		3463 N W Canal Rd, (Elmore County)

PETITION TO CREATE A COMMUNITY COLLEGE DISTRICT

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	Date	Printed Name	Signature	Voting Elmore County Address
1	11-8-2021	William Galleske		384 E. Garfield Ave 83623
2	11-8-2021	Gary Swan		582 N. Potter Dr. Kuna ID 83634
3	11-8-2021	Krishe Ferry		1900 N. Cobblestone Rd Kuna ID 83633
4	11-8-2021	CHRISTOPHER NICHOLS		5567 E. HENRY JONES Rd. 83623
5	11-11-2021	Michele A. Ward		17390 W. Railroad GF 83633
6	11-11-2021	Michael S. Connell		10360 old Highway 30 Hammett 83627
7	11-11-2021	Kirk J. Fike		631 S. Oregon St Glenns Ferry 83623
8	11-11-2021	Dwight G. Fike		631 S. Oregon St Glenns Ferry 83623
9	11-11-2021	David Bohler		9570 Hwy 78 Hammett ID 83627
10	11-11-2021	Edna Jaureguito		684 So. Orchard Glenns Ferry ID 83623
11	11/11/2021	DALE W. Smith		8204 E. John Parke Rd Kuna ID 83634
12	11/11/2021	Kenny Rowe		2229 NTS Rabbit Creek ID 83623
13	11/11/21	Jean Frank		4165 E Montgomery Rd Kuna ID 83634
14	11/11/21	LINDA S. ATTISON		390 W. Orchard Ave Glenns Ferry ID 83623

	Date	Printed Name	Signature	Voting Elmore County Address
15	11-9-2021	Billie Dillon	Billie Dillon	48 W 2nd Glenns Ferry
16		Vicki Smith	Victoria G. Smith	8204 E John Parke Rd KH ID 83633
17	11/11/21	Dalinda D. Moffet	Linda D Moffet	521 S Boise St Glenns Ferry Idaho 83623
18	11/11/21	Gary Klett	[illegible]	2236 Morrow Reservoir Rd Glenns Ferry ID 83623
19	11/11/21	Tracy Klett	Tracy Klett	2236 Morrow Reservoir Rd Glenns Ferry ID 83623
20	11/11/21	Virginia Blish	Virginia J Blish	150 E Garfield Ave Glenns Ferry ID 83623
21	11/15/21	Jeremy Works	[illegible]	87 E Snake River Ave Glenns Ferry ID 83623
22	11/15/21	Kristian McFarland	[illegible]	288 E. Snake River Ave. Glenns Ferry, ID 83623
23	11/15/2021	Teresa Parsons	Parsons	270 N Alton, Glenns Ferry, ID 83623
24	11-29-2021	Adele Gauer	Adele Gauer	633 South School House Rd Hammett, ID 83627
25	11-29-2021	Robert Gauer	Robert W Gauer	633 S. School House Rd Hammett ID 83627
26	1-5-22	Martha Louise Lisle	Martha Louise Lisle	4294 N Washington Ave
27				
28				
29				
30				

12 - GF

12

CERTIFICATION

OF

SIGNATURES

STATE OF IDAHO)
) SS.
COUNTY OF ELMORE)

I, Shelley Essl, County Clerk of Elmore County, Idaho, do hereby certify that **85 (Eighty-five)** signatures on this petition to **Create A Community College District** are those **of qualified electors**, and, if applicable, qualified electors in the Mountain Home School District.

SEAL

ELMORE COUNTY, IDAHO
SEAL
AUDITOR & RECORDER

SHELLEY ESSL
ELMORE COUNTY CLERK

KELSEY CHENEY
DEPUTY CLERK

8/31/2022
Date

PETITION TO CREATE A COMMUNITY COLLEGE DISTRICT

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	Date	Printed Name	Signature	Voting Address/City
	7/2/2022	Chris DeVore	[signature]	730 E 4th N. Mountain Home ID 83647
	7/2/2022	Mario E Alcala	[signature]	760 SW Portal St Mountain Home ID 83647
	7/2/2022	Marnie Alcala	Marnie alcala	↑ same
	7/2/2022	Elizabeth DeVore	[signature]	411 NW Garrett Ave, MTN HM
	7/2/2022	Roy DeVore	[signature]	605 Lago St. Mtn Hm
	7/2/2022	JENN MERDEVORE	[signature]	605 Lago St. Mtn. Home ID.
	7/2/2022	Richard Urquidi	[signature]	851 NE Sand Pebbles Ln MH.
	7/2/2022	Rhonda Urquidi	Rhonda Urquidi	851 NE Sand Pebbles Ln Mtn. Hom
ved x	7/2/2022	Cesar Juarez	Rogelio Juarez	61 N Brabchery St G
NR x	7/2/2022	Dominique Bell	[signature]	8927A Raymond Smart Cir., Mtn. Home ID
NR x	7/2/2022	ADAM BYERLY	[signature]	9373A HILDING JOHNSON CIR MHAFB ID
NR x	7/2/2022	ASPEN BYERLY	Aspen Byerly	9373A HILDING JOHNSON CIR MHAFB ID
NR x	7/2/2022	Alexzandra Bell	[signature]	8927A Raymond Smart Circ. MTN HM
	7/2/22	Kim Middleton	[signature]	215 S. 3rd East Mountain Home, ID 83647
	7/2/22	HANNAH GUYER	[signature]	215 S 3RD E MTN. HOME 83647
	7/2/22	KIM SYKES	[signature]	2320 N 6th E Mtn Home Id 83647
	7/2/2022	Rich Sykes	[signature]	2320 N 6th East Mountain Home, ID 83647
x	7/2/22	Darcie Beeler	[signature]	875 Galena St Mtn Home, ID 83647
	7/2/22	Amber Hire	[signature]	645 SW Huebert St Mtn Home, ID 83647
	7/2/22	STEVEN RAMIREZ	[signature]	1691 NE QUIGLEY ST MTN HOME, ID 83647
	7/2/22	Bobbilo Ramirez	[signature]	1691 NE Quigley St Mtn. Home ID 83647

15

PETITION TO CREATE A COMMUNITY COLLEGE DISTRICT

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7/2/2022	Chris DeVore	[signature]	730 E 4th N. Mountain Home ID 83647
7/2/2022	Mario E Alcala	[signature]	760 SW Portal St Mountain Home ID 83647
*NR 7/2/2022	Marnie Alcala	Marnie alcala	↑ same
7/2/2022	Elizabeth DeVore	[signature]	411 NW Garrett Ave, MTN HM
7/2/2022	Roy DeVore	[signature]	605 Lago St. Mtn Hm
7/2/2022	JENNIFER DEVORE	[signature]	605 Lago St. Mtn. Home ID.
7/2/2022	Richard Urquidi	[signature]	851 NE Sand Pebbles Ln MH.
7/2/2022	Rhonda Urquidi	Rhonda Urquidi	851 NE Sand Pebbles Ln Mtn. Home
7/2/2022	Cesar Juarez	[signature]	61 N Brabchery St G ?
*NR 7/2/2022	Dominique Bell	[signature]	8927A Raymond Smart Cir., Mtn. Home ID
*NR 7/2/2022	ADAM BYERLY	[signature]	9373A HILDING JOHNSON CIR MHAFB ID
*NR 7/2/2022	ASPEN BYERLY	Aspen Byerly	9373A HILDING JOHNSON CIR MHAFB ID
*NR 7/2/2022	Alexzandra Bell	[signature]	8927A Raymond Smart Circ. MTN HM
7/2/22	Kim Middleton	[signature]	215 S. 3rd East Mountain Home ID 83647
7/2/22	HANNAH GUYER	[signature]	215 S 3RD E MTN. HOME 83647
7/2/22	KIM SYKES	[signature]	2320 N 6th E Mtn Home Id 83647
7/2/2022	Rich Sykes	[signature]	2320 N 6th East Mountain Home, ID 83647
*NR 7/2/22	Darcie Beeler	[signature]	875 Galena Ct Mtn Home, ID 83647
7/2/22	Amber Hire	[signature]	645 SW Huebert St Mtn Home, ID 83647
7/2/22	STEVEN RAMIREZ	[signature]	1691 NE QUIGLEY ST MTN HOME, ID 83647
7/2/22	Bobbilo Ramirez	[signature]	1691 NE Quigley St Mtn. Home ID 83647

14

PETITION TO CREATE A COMMUNITY COLLEGE DISTRICT

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	Date	Printed Name	Signature	Voting Address/City
- ✓	7/2/2022	BROCK CHERRY	B.Z. Cr	1715 SW GABAR CT. MTN. HOME ID. 83647
- ✓	07/02/2022	TERAN MITCHELL	[illegible]	535 MALLTOOTH AVENUE MTN. HOME, ID 83647
NR X	2 July 2022	Tiffany Aulbach	[illegible]	2604 N Morrow Rd. Glenns Ferry ID 83623
NR X	2 July 2022	Jayne Dope	J. Dope	8848A Foxhunt Loop MtnAFB, ID 83648
NR X	2 July 2022	Kelsey Corcoran	Kelsey Corcoran	463 NW Sandpiper Aven Mtn. Home ID 83647
NR X	2 July 2022	Madison Wright	Madison Wright	202 Victor Gust Dr. Mountain Home, ID 83647
X	2 July 2022	Bryanna Strom	[illegible]	1830 American Legion Blvd Mountain Home ID
- ✓	2 July 22	Brenda Raub	Brenda Raub	375 NE Greystone Loop MtnID
- ✓	2 July '22	Amber Coboos	[illegible]	1675 NE Cinder Loop Mountain Home, ID 83647
NR X	2 July 22	Brittany Macheras	Britt M	1060 SW Bonnie St Mountainhome, ID 83647
NR X	2 July 22	Tiffany Allen	[illegible]	620 Peter Dr Mountain Home ID 83647
✓	2 July 22	Knight C Duerry	[illegible]	4199 N. Meridian St, King Hill, ID 83633
[illegible] X	7-2-22	SCOTT CONNER	[illegible]	2025 N 6 E MOUNTAIN HOME, IDAHO 83647
- ✓	7-2-22	Jon Sandborn	[illegible]	1250 Elm St Mt Home ID, 83647
- ✓	7-2-22	Maureen Burke	[illegible]	1250 Elm St Mt Home ID 83647
- ✓	7-2-22	Aprin Nicolosi	[illegible]	3869 N 18E MTN Home Id 83647
More	7-2-22	ROBBIE NICOLOSI	[illegible]	970 N 9TH E MTN. HOME
- ✓	7-2-22	Nathan Bundy	[illegible]	1110 SW Camille Mtn Home ID 83647
NR X	7-2-22	Jessica Boles	[illegible]	8011 Andrews Ct Mountain Home AFB
NR X	7-2-22	William James	[illegible]	1208 NW Nova Ct Mountain home
- ✓	7-2-22	Kirsten Cherry	Kirsten Cherry	1715 SW Gabar Ct Mtn Home

10

MHSD
Voters

PETITION TO CREATE A COMMUNITY COLLEGE DISTRICT

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	Date	Printed Name	Signature	Voting Address/City
-✓ 19	7/16/2022	JOHN BIDEGANETA	[signature]	4749 CANYON CREEK RD MTN. HOME, ID 83647
-✓ 20	7/16/2022	Tracy Bideganeta	Tracy Bideganeta	4749 Canyon CK Mtn Home ID 83647
✓ 21	7/16/2022	Kya Vines	[signature]	1667 S Joe King Rd Hammett
-✓ 22	7/16/2022	Abbigail Wiring	[signature]	7323 Canyon Creek Rd Mtn Home ID 83647
ag X 23	7/14	Jordan Cross	[signature]	1075 Wairbase RD Mountain Home
-✓ 24	7/16/2022	Matthew Valdez	[signature]	175 E 12th N Mountain Home
NR X 25	7/16/22	Kevin Valdez	[signature]	1075 W airbase rd Mtn Home
✓ 26	7/16/22	DRU BOYD	[signature]	555 S. NANNY BERRY WAY HAMMETT 83627
-✓ 27	7-16-22	Mildred Cantrell	Mildred Cantrell	150 N W Beaman Mtn Home ID 83647
-✓ 28	7-16-22	JEANNIE CRANE	[signature]	1320 Peregrine Dr. Mtn Home 83647
-✓ 29	7-16-22	Doug Crane	[signature]	Same

9

MOUNTAIN HOME SD
VOTERS

PETITION TO CREATE A COMMUNITY COLLEGE DISTRICT

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Date	Printed Name	Signature	Voting Address/City
16 July 22	Jennifer L. Clark	Jennifer L. Clark	5223 NW Tennant ave
16 July 22	Dolores Jewett	[illegible]	5620 N 18th E Mtn Home ID
16 July 22	Alisha Elledge	[illegible]	110 NW Wilcox Drive Mtn Home
16 July 22	Brad Stokes	[illegible]	1750 Silverstone Ave
16 July 22	Ryan Kuntz	[illegible]	4905 S. 18th E. Mtn home
16 July 22	Mitch Smith	[illegible]	1561 SE Beet Dump Mt Home
~~16 July 22~~	Saul Meyer	Saul Meyer	2516 N 9th E Mt
16-July 22	Andrea Fisher	Andrea Fisher	555 E 12th So
16-July 22	Ronald F. Fisher	Ronald F. Fisher	555 E 12th S.
16-July-22	Justine V Clark	[illegible]	5223 NW Tennant Ave.
16-July-22	Samatha Fraser	[illegible]	2301 SW Graham Dr
16-July 22	Simon Fraser	[illegible]	2301 SW Graham Dr Mt Home
16 July 22	Brooks, Chris	[illegible]	2115 NE Summer Wind Dr
7/16/22	Michelle Peterson	mpeterson	3530 N 18 E Mtn Home
7/16/22	Katie Olds	Katie Olds	5669 N. 18th E Mtn. Home ID
7/16/22	Jacob Olds	Jacob Olds	5669 N. 18th E. Mtn. Home
7-16-22	Rena Kerfoot	Rena Kerfoot	997 NE Sadupa Dr Mtn Home
7-16-22	Cathy Smith	[illegible]	1561 SE Beet Dump Rd Mtn

14

Mountain Home
SD Voters

PETITION TO CREATE A COMMUNITY COLLEGE DISTRICT

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3) I am registered to vote at the address listed below which is in Elmore County, Idaho.

Date	Printed Name	Signature	Voting Address/City
7/16/22	MARIE CARLON	Marie Carlon	506 W 3N Mtn Home
7/16/22	Jessica Morris	Jessica Morris	1215 N. 6th E
7/16/22	Scott Bodle	Scott Bodle	3075 SW Old Grandview Hwy
7/16/20	Julia Corder	Julia Corder	495 SE Two Bits Ln.
7/16/22	Paul Barrutia	[illegible]	1005 W 12th S. Mt Home
7/16/22	Larry Jewer	Larry Jewer	5670 N 18th E Mtn. Home
7/16/22	Laura Bellegante	Laura Bellegante	2516 N 3rd E, Mtn Home
7/16/22	Tre Riley	[illegible]	5985 SW Riley Lane
7/16/22	Billy Riley	Billy Riley	5955 SW Riley lane
7/16/2022	[illegible]	Samantha Riley	5985 SW Riley lane Mtn Home ID
7/16/22	Kristin Riley	Kristin Riley	5955 SW Riley Ln Mt Home ID
7/16/22	Taylor Owen	Taylor Owen	2468 NE Doris Dr. Mtn Home, ID
7/16/22	Brianna Clark	Brianna Clark	5251 NW Tennant Ave Mtn. Home
7/16/22	CHRIS PARKS	[illegible]	920 S Haskett St
7/16/22	Dawas Schreiber	[illegible]	5472 NE Rancho Way Mt. ID
7/16/22	Bobbie Law	[illegible]	1580 NE Beaman Mtn Home Id
7/16/22	Juan Abaurra	[illegible]	same
7/16/22	Trinity Law	[illegible]	205 NW Carrie Circle Mtn Home Id

17

PETITION TO CREATE A COMMUNITY COLLEGE DISTRICT

We, the undersigned citizens and qualified electors of the State of Idaho, in and for Elmore County, respectfully petition for the creation of the following:

1. A community college district to support and supervise the College of Southern Idaho.
2. That said, the proposed community college district encompasses all of Elmore County, Idaho.

Each of the following signers certifies that: 1) I have personally signed this petition and 2) I am registered to vote under the name signed below, and
3) I am registered to vote at the address listed below which is in Elmore County, Idaho.

Date	Printed Name	Signature	Voting Address/City
07/16	Hannah Black		1122 E Canterbury Ln, Mtn Home
7/17	LORI McKenzie	LM	125 NE Windy St Mtn. Home ID 83647
07-17-2022	Charlotte Moody-Emerson		820 N 10 E Mountain Home ID 83647
	Husband		

3
2

Mountain Home SD

PETITION TO CREATE A COMMUNITY COLLEGE DISTRICT

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Date	Printed Name	Signature	Voting Address/City
✓ 8-15-2022	Lorena Ryan		Mountain Home 425 gridley Pla
x not valid 8-15-2022	Keri Borger		Mountain Home
✓ 8/15/2022	Matthew Ryan		Mountain Home 425 gridley Place
✓ 8/15/2022	Rob Pearce		1355 SE Beet Dump Rd Mountain Home

3

IDAHO NOTARY ACKNOWLEDGMENT

State of Idaho

County of Elmore

On this 26th day of August, in the year 2022, before me, Julia G. Kennedy (Notary's name) a notary public, personally appeared Christine Acord (only) (individual's name), personally known to me to be the person(s) whose name(s) is (are) subscribed to the within instrument, and acknowledged to me that he (she) (they) executed the same.

Seal

JULIA G KENNEDY
Comm. No. 20203640
NOTARY PUBLIC
Expires: 09/16/2026
STATE OF IDAHO

Julia G Kennedy
Notary Public

My Commission expires on: 9/16/2026

Glenns Ferry SD

PETITION TO CREATE A COMMUNITY COLLEGE DISTRICT

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Date	Printed Name	Signature	Voting Address/City
8/15/2022	Brenna Fisher	[signature]	513 S Thacker Rd Hammett, ID
8/15/2022	Emily Wright	[signature]	786 E 1st Ave #9 Glenns Ferry ID 83623
8/15/22	Kandace Titus	[signature]	64 W. 2nd Ave GF, ID 83623
8/15/22	Dustin Johnson	[signature]	9863 old Hwy 30 HAMMETT ID
8/15/2022	BRIAN BECKLEY	[signature]	9143 W Osprey St Hammett Idaho 83627
8/15/22	Traci Beckley	[signature]	9143 W Osprey St Hammett, ID 83627
8/15/22	Dwayne R McLean	[signature]	437 W Madison Ave Glens Ferry Id
8/15/22	Leb Schumacher	[signature]	47 N ELMORE St.
8/15/22	Jannette Rea	[signature]	2157 E Pasadena Valley rd Kingshill, 83633
8/15/22	Corey Arellano	[signature]	9141 W Church St Hammett ID 83627
8/15/2022	Jordan Thomas	[signature]	812 West Garfield Glenns Ferry Id 83623
8/15/2022	ALAN KRANE	[signature]	1033 W. MESA VIEW DR HAMMETT
8/15/2022	Mark Merrell	[signature]	996 W. Madison Ave GF 83623
8-15-2022	Kevin Gonzalez	[signature]	584 S. Owyhee St. Glenns Ferry
8-15-2022	Marlene Bauman	[signature]	7601 South Grindstone Glenns Ferry, Id
8-15-2022	Shon Thompson	[signature]	630 N BANNOCK ST. GLENNS FERRY
8-15-2022	Joyce Humphreys	[signature]	609 S. Humphreys Rd. HAMMETT
8-15-22	Tina Schelinder	[signature]	8728 Old Hwy 30 #32 Hammett

Glenns Ferry SD

PETITION TO CREATE A COMMUNITY COLLEGE DISTRICT

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Date	Printed Name	Signature	Voting Address/City
8/15/22	Sonia Wadeworth	Swadeworth	274 W Idaho Ave
8/15/22	maria Hurtado	Maria Hurtado	746 old Highway 30 #3
8/15/22	Melanie McLean	Melanie McLean	437 W Madison Ave.
8-15-22	Lorinda Meeker	Lorinda Meeker	565 E Garfield Ave
8-15-22	Jennifer Reece		7853 W Ringert Hammett
8-15-22	Carie Jackson	Carie Jackson	149 W. Washington GF PO Box 234
8-15-22	Lui Titus		149 W. Washington G.F.
8-15-22	natasha king	Natasha King	201 n Bronco Ln King Hill, ID 83633
8-15-22	Heather Muddiman	Heather Muddiman	3361 W. Crane Rd King Hill Id
8-15-22	Ismael Re		429 E 5th Glenns Ferry ID
8-15-22	Guadalupe Nolasco	Guadalupe N	10352 E Gopher Knoll King Hill Id 83633
8/15/22	Merry Jo Hersey		1450 S. Penny Ln. King Hill, ID 83633
8/15/22	Rose Shenk	Rose Shenk	592 S. Raspberry Ln Hammett ID 83627
8/15/22	Heather Espino		286 E Syringa Circle Glenns Ferry ID 83623
8/15/22	Sarah Moore	Sarah Moore	295 N Commercial
8/15/22	Shannon Worton	Shannon Worton	185 N. Kansas Ave. GF
8/15/22	Candice Hill	Candice Hill	599 N. Elmore Ave GF
8-15/22	Patrick Dickson		940 S. Jade Way

GFSD

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Date	Printed Name	Signature	Voting Address/City
8/15/2022	Jen Hershee	Jen Hershee	63 W Snake River Glenns Ferry ID 83623
8/15/2022	Kelli McHone	Kelli McHone	924 E. Garfield Ave. Glenns Ferry, ID 83623
8/15/22	Liza Martin	Liza Martin	360 W. Madison Ave GF, ID 83623
8/15/22	Amy Hill	Amy Hill	582 W. 1st Ave G.F. ID 83623

GFSD

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Date	Printed Name	Signature	Voting Address/City
8-15-22	Stacy Dickson		9405 Jade W Hammett ID 83627
15 Aug 22	Sarah Thomas	S Thomas	PO Box 6 GF 83623
15 Aug 22	Cynthia Sherman	C Sherman	4128 Douglas King Hill 83633

Mountain Home SD

PETITION TO CREATE A COMMUNITY COLLEGE DISTRICT

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Date	Printed Name	Signature	Voting Address/City
8-15-2022	Lorena Ryan		Mountain Home 425 gridley Pla
8-15-2022	Keri Borger		Mountain Home
8/15/2022	Matthew Ryan		Mountain Home 425 gridley Place
8/15/2022	Bob Pearce		1353 SE Beet Dump Rd. Mountain Home

GLENNS FERRY VOTER
108 signe

PETITION TO CREATE A COMMUNITY COLLEGE DISTRICT

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	Date	Printed Name	Signature	Voting Address/City
1	7/16/22	Laurel Lenz	[signature]	761 S Boise St Glenns Ferry, Id 8362
2	7/16/22	Samatha Lenz	[signature]	761 S Boise St Glenns Ferry Id
3	7/16/22	Sandy Mills	[signature]	7097 E Chafin Rd King Hill ID 83633
4	7/16/22	Pat Order	[signature]	127 N. Elmore Ave Glenns Ferry
5	7/16/22	John Orfeas	[signature]	127 N ELMORE GLENN'S FERRY
6	7/16/22	Nick Blaksma	[signature]	604 N Medbury Hill Dr Hammett ID 83627
7	7/16/22	Rick Hance	[signature]	19 E Cleveland GF, ID 83623
8	7/16/22	Cliff Lisle	[signature]	
9	7/16/22	Darlene Owen	[signature]	1959 SE Ross Rd G.F.
10	7/16/22	Sally Wolfe	[signature]	475 S. Sailor Creek RD. G.F
11	7/16/22	APRIL WOOTAN	[signature]	2280 S. Pruett Rd Kitt. 8363
12	7/16/22	Jessica Howard	[signature]	8844 W Spangler Hammett, ID 836
13	7/16/22	Jose Gutierrez	[signature]	~~P.O. Box 812~~ 385 S. Com Glenns Ferry 83623
14	7/16/22	Kendall Martell	[signature]	50 E Arthur Glenns Ferry
15	1-16-22	Eric Stewart	[signature]	50 E Arthur Glenns Ferry
16	7/16/22	Stephanie Harmon	[signature]	49 W Garfield Ave Glenns Ferry, ID 83623
17	7/16/22	Christine Wootan	[signature]	Glenns Ferry
18	7/16 22	Wesley R Wootan	[signature]	Glenns Ferry Id

2680 E Wootan Lane
King Hill Idaho 83633

PETITION TO CREATE A COMMUNITY COLLEGE DISTRICT

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Date	Printed Name	Signature	Voting Address/City
7-12-22	Candy van Norman	[signature]	5043 E Ruberry Rd King Hill
7/12/22	Steven Van Norman	[signature]	5043 E Ruberry Rd King Hill ID 83633
7/12/22	Hersy, Larry L. Jr.	[signature]	1457 S. Penny Lane King Hill Id 83633
7/12/22	Butch Baker	[signature]	441 N Bannock ST Glenns Ferry
12 JUL 2022	Emily Comaro-Bujno	[signature]	2395 E Little Basin RD KING HILL ID 83633
12 JUL 2022	Gregory M. Bujno	[signature]	2395 E Little Basin Rd King Hill ID 83633
7-11-22	Kristie Ferry	[signature]	1910 N. Coblentz Rd King Hill
7-15-22	Todd J Cook	[signature]	644 E. Cleveland GF
7/15/22	Gary McCrea	[signature]	119 W 1st Glenns Fe
7/15/22	Jim Dillard	[signature]	5520 E Park ST King Hill Id
7-15-22	Tracy Reece	[signature]	514 E 1st GF Idaho
7-15-22	Lucas Longstaff	[signature]	4301 N. Mesa Rd. King Hill, Id 83633
7-15-22	Roland Garza	[signature]	94 Midea Glenns Ferry Id 83623
7-15-22	Sharon Wean	Sharon Wean	80 N. Alton GF Ida 83623
7/15/22	Tamara Shenk	[signature]	5246 E King Hill Frontage Rd 836
7/15/22	Ray Dell Bosh	Ray D. Bosh	5613 E. Main ST. King Hill Id 836
7/15/22	Nadine Cook	[signature]	644 E Cleveland Ave Glenns Ferry ID 83623
18 7/15/22	Melinda Sterling	[signature]	118 E 4th St Glenns Ferry ID 83623

GLENNS FERRY SD VOTERS

PETITION TO CREATE A COMMUNITY COLLEGE DISTRICT

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Date	Printed Name	Signature	Voting Address/City
7-14-2022	Darlene R Adams	Darlene R Adams	221 S. Main Ave Hammett, ID 83627
7-15-2022	Julia E Heath	Julia E Heath	"
7-15-2022	Dorothy Drake	Dorothy Drake	481 N Liberty Dr King Hill ID 83633
7-15-2022	Christopher Nichols		5567 E. Henry Jones Rd, King Hill ID 83633
7-16-2022	Rick Wooton		2256 S. Pruett Rd
7-16-22	Jose Guerrero		599 N. Atlanta Glenns Ferry Id 83623
7-16-22	Jared Zito		8875 W Stayton RD Hammett ID
7-16-22	Amber Rodgers	Amber Rodgers	150 W Cleveland Glenns Ferry
7-16-22	Sammy White	S. White	676 W. Elmore Glenns Ferry, ID
7-16-22	Patricia Hernandez		5775 E Cabin LN King Hill ID 83633
7-16-22	Tim Fenwick		486 Frog Follow 83633
7-16-22	Keyton Cook		644 East Cleveland 83623
7-16-22	Carson Grigg		70 W. Harrison ave Glenns Ferry ID 83623
7-16-22	Mathew Carlon		114 E 9th Fairfield Glenns Ferry
7-16-22	Kathy L Huber		PO Box 216 Glenns Ferry
7-16-22	Stacie pollard		375 N Alder Lane Glenns Ferry, ID 83623
7-16-22	KAREN FRANK		4105 E. Montgomery Rd King Hill, Id 83633
7-16-22	Pamela Johnson		623 S. Cleveland Glenns Ferry ID

18

PETITION TO CREATE A COMMUNITY COLLEGE DISTRICT

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	Date	Printed Name	Signature	Voting Elmore County Address
1	11-8-2021	William Galleshaw		384 E. Garfield Ave 83623
2	11-8-2021	Gay Swan	Gay Swan	522 N. Porter Dr. King Hill 83633
3	11-8-2021	Kristie Ferry	Kristie Ferry	1910 N. Cobblestone Rd King Hill 83633
4	11-8-2021	CHRISTOPHER NICHOLS		5567 E. HENRY JONES Rd. 83623
5	11-11-2021	Michiele A. Ward	Michiele Ward	1732 W. Railroad GF 83623
6	11-11-2021	Michael S. Connell		10360 old Highway 30 Hammett 83627
7	11-11-2021	Vicki J. Fike	Vicki J Fike	631 S Oregon St Glenns Ferry 83623
8	11-11-2021	Dwight G Fike		631 S. Oregon St Glenns Ferry 83623
9	11-11-2021	David Baker		9570 Hwy 78 Hammett 83627
10	11-11-2021	EDWARD CHRISTOPHERSEN		688 S. Commercial Glenns Ferry ID 83623
11	11/11/2021	DALE W. Smith	Dale Smith	8204 E. John Parke Rd King Hill ID 83633
12	11/11/2021	KENNETH ROWE		2279 Little Basin Rd King Hill ID 83623
13	11/11/21	JOHN FRANK		4105 E Montgomery Rd Hill ID 83633
14	11/11/21	LINDA S. PATTISON		390 W. Garfield Ave Glenns Ferry ID 83623

	Date	Printed Name	Signature	Voting Elmore County Address
15	11-9-2021	Billie Dillon	Billie Dillon	48 W 2nd Glenns Ferry
16		Vicki Smith	Victoria G. Smith	8204 E John Parke Rd KH ID 83633
17	11/11/21	Dalinda D. Moffet	Linda D Moffet	521 S Boise St Glenns Ferry Idaho 83623
18	11/11/21	Gary Klett	[illegible]	2236 Morrow Reservoir Rd Glenns Ferry ID 83623
19	11/11/21	Tracy Klett	Tracy Klett	2236 Morrow Reservoir Rd Glenns Ferry ID 83623
20	11/11/21	Virginia Blish	Virginia J Blish	150 E Garfield Ave Glenns Ferry, ID 83623
21	11/15/21	Jeremy Works	[illegible]	87 E Snake River Ave Glenns Ferry ID 83623
22	11/15/21	Kristian McFarland	[illegible]	288 E. Snake River Ave. Glenns Ferry, ID 83623
23	11/15/2021	Teresa Parsons	Parsons	270 N Alton, Glenns Ferry, Id 83623
24	11-29-2021	Adele Gauer	Adele Gauer	633 South School House Rd Hammett, ID 83627
25	11-29-2021	Robert Gauer	Robert W Gauer	633 S. Schoolhouse Rd Hammett ID 83627
26	1-5-22	Martha Louise Lisle	Martha Louise Lisle	4294 N. Washington Ave
27				
28				
29				
30				

GFSD voters

PETITION TO CREATE A COMMUNITY COLLEGE DISTRICT

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	Date	Printed Name	Signature	Voting Address/City
1	~~7-16-2022~~	~~M. Louise Lisle~~	~~M. L. Lisle~~	~~4249 N. Washington King Hill~~
2	7-16-22	Melinda Lisle	M Lisle	4294 N Washington King Hill
3	7-16-22	Clay Pollar	Clay Pollar	355 N. Alder GF
4	7-16-22	Darwin Bybee	[illegible]	461 N Liberty Dr KH
5	7-16-22	Jean Bybee	Jean Bybee	461 N Liberty Dr KH
6	7-16-22	Brock Lenz	B Lenz	761 S. Boise St.
7	7-16-22	Sydney Goeckner	Sydney Goeckner	124 N. Sailor Cr Rd GF
8	7-16-22	Kevin King	K King	201 N Bronco Ln KH
9	7-16-22	Sarah Swan	[illegible]	240 E. Syringa, GF
10	7-16-22	C. Williams	Carol Williams	1217 E Cleveland GF
11	7-16-22	K. Wills	Kimra Wills	289 W. Arthur GF
12	7-16-22	Jancane Butler	Jancane B	Po Box 146 Glenns Ferry
13	7-16-22	W. Alfredson	Wendy Alfredson	353 W Madison Ave GF
14	7-16-22	Amy Alfredson	Amy Alfredson	145 N 18 E, MH
15	7-16-22	Joann Heath	Joann Heath	4149 N Id Ave KH
16	7-16-22	Marlena Vallard	Marlena Vallard	9722 old hiway 30 Hammond
17	7-16-22	Sunrise McKechnie	Sunrise McKechnie	
18	7-16-22	Cindy Sherman	Cindy D. Sherman	4128 Douglas King Hill 83633

MHSD
voters

PETITION TO CREATE A COMMUNITY COLLEGE DISTRICT

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	Date	Printed Name	Signature	Voting Address/City
19	7/16/2022	JOHN BIDEGANETA	[signature]	4749 CANYON CREEK RD MTN. HOME, ID 83647
20	7/16/2022	Tracy Bideganeta	Tracy Bideganeta	4749 Canyon CK Mtn Home ID 83647
21	7/16/2022	Kya Vines	[signature]	1667 S Joe King Rd Hammett
22	7/16/2022	Abbigail Winings	[signature]	7323 Canyon Creek Rd Mtn Home ID 83647
23	7/14	Jordan Cross	[signature]	1075 W air base RD Mountain Home
24	7/16/2022	Matthew Valdez	[signature]	175 E 12th N Mountain Home
25	7/16/22	Kevin Valdez	[signature]	1075 W airbase rd Mtn Home
26	7/16/22	DRU BOYD	[signature]	555 S. NAVY BERRY WAY HAMMETT 83627
27	7-16-22	Mildred Cantrell	Mildred Cantrell	150 N W Beaman Mtn Home ID 83647
28	7-16-22	JEANNIE CRANE	[signature]	1520 Peregrine Dr. Mtn Home 83647
29	7-16-22	Doug Crane	[signature]	Same

MOUNTAIN HOME S.
VOTERS

PETITION TO CREATE A COMMUNITY COLLEGE DISTRICT

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Date	Printed Name	Signature	Voting Address/City
16 July 22	Jennifer L. Clark	Jennifer L. Clark	5223 NW Tennant ave
16 July 22	Dolores Jewett	Dolores Jewett	5670 N 18th E Mtn Home ID
16 July 22	Alisha Elledge	[illegible]	110 NW Wilcox Drive Mtn Ho
16 July 22	Brad Stokes	[illegible]	1750 Silverstone Dr
16 July 22	Ryan Kuntz	[illegible]	4905 S. 18th E. Mtn home
16 July 22	Mitch Smith	[illegible]	1561 SE Beet Dump mt H
16 July 22	Saml. Meyer	Saml Meyer	2516 N 3rd E Mt
16-July 22	Andrea Fisher	Andrea Fisher	555 E 12th So
16-July 22	Ronald F. Fisher	Ronald F. Fisher	555 E 12th S.
16-July-22	Justine V. Clark	[illegible]	5223 NW Tennant Ave.
16-July-22	Samatha Fraser	[illegible]	2301 SW Graham Dr
16-July 22	Simon Fraser	[illegible]	2301 SW Graham Dr mt Ho
16 July 22	Brooks, Chris	[illegible]	2115 NE Summer Wind Dr
7/16/22	Michelle Pehrson	mpehrson [illegible]	3535 N 18 E Mtn Home
7/16/22	Katie Olds	Katie Olds	5669 N. 18th E Mtn. Home ID
7/16/22	Jacob Olds	Jacob Olds	5669 N. 18th E. Mtn. Home
7-16-22	Rena Kerfoot	Rena Kerfoot	997 NE Sodupa Dr Mtn Home
7-16-22	Cathy Smith	[illegible]	1561 SE Beet Dump Rd Mt H

Mountain Home SD Voters

PETITION TO CREATE A COMMUNITY COLLEGE DISTRICT

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2. That said, the proposed community college district encompasses all of Elmore County, Idaho.

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Date	Printed Name	Signature	Voting Address/City
7/16/22	MARIE CARLON	Marie Carlon	606 W 3N Mtn Home
7/16/22	Jessica Mannes	Jessica Mannes	1215 N. 6th E
7/16/22	Scott Bodle	Scott Bodle	3075 SW Old Grandview Hwy
7/16/20	Julia Corder	Julia Corder	495 SE Two Bits Ln.
7/16/22	PAUL BARCUTIA	P B	1005 W 12th S. Mtn Home
7/16/22	Larry Sewer	Larry Sewer	5670 W 18th E Mtn. Home
7/16/22	Laura Bellegante	Laura Bellegante	2516 N 3rd E, Mtn Home
7/16/22	Tre Riley		5985 SW Riley Lane
7/16/22	Billy Riley	Billy Riley	5955 SW Riley Lane
7/16/2022		Samantha Riley	5985 SW Riley Lane Mtn Home ID
7/16/22	Kristin Riley	Kristin Riley	5955 SW Riley Ln Mtn Home ID
7/16/22	Taylor Owen	Taylor Owen	2468 NE Dogwood Dr. Mtn Home, ID
7/16/22	Brianna Clark	Brianna Clark	5251 NW Tremont Ave
7/16/22	CHRIS PARKS	Chris Parks	920 S Haskett St Mtn. Home
7/16/22	Dawn Schreiber	Dawn	5472 NE Ranchoway Mtn. ID
7/16/22	Bobbie Lee		1580 NE Beamon Mtn Home Id
7/16/22	Juan Alvarez		same
7/16/22	Trinity Law		205 NW Connie Circle Mtn Home Id

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Date	Printed Name	Signature	Voting Address/City
07/16	Hannah Black	[signature]	7322 E Canterbury Ln, Nampa
7/17	LORI McKenzie	[signature]	125 NE Windy St Mtn. Home ID 83647
07-17-2022	Charlotte Moody-Emerson	[signature]	820 N 10 E Mountain Home ID 83647
	[signature]		

3

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Date	Printed Name	Signature	Voting Address/City
7/2/2022	BROCK CHERRY	B.C.	1715 SW GABAR CT. MTN. HOME ID. 83647
07/02/2022	TERAN MITCHELL	[illegible]	535 SALLTOOTH STREET MTN. HOME, ID 83647
2 July 2022	Tiffany Aulbach	[illegible]	2604 N Morrow Resd. Glenns Ferry ID 83623
2 July 2022	Jayne Dope	J. Dope	8848A Foxhunt Loop MtnAFB, ID 83648
2 July 2022	Kelsey Corcoran	Kelsey Corcoran	463 NW Sandpiper Aven Mtn. Home ID 83647
2 July 2022	Madison Wright	Madison Wright	202 Victor Gust Dr. Mountain Home, ID 83647
2 July 2022	Bryanna Strom	[illegible]	1830 American Legion Blvd Mountain Home ID
2 July 22	Brenda Raub	Brenda Raub	375 NE Greystone Loop MH ID
2 July '22	Amber Coboos	[illegible]	1675 NE Cinder Loop Mountain Home, ID 83647
2 July 22	Brittany Macheras	[illegible]	1060 SW Bonnie St Mountainhome, ID 83647
2 July 22	Tiffany Allen	[illegible]	620 Teton Dr Mountain Home ID 83647
2 July 22	Knight C Duerry	[illegible]	4199 N. Meridian St. King Hill, ID 83633
7-2-22	SCOTT CONNER	[illegible]	2025 N 6 E MOUNTAIN HOME, IDAHO 83647
7.2.22	Jon Sandbom	[illegible]	1250 Elm St Mt Home ID, 83647
7.2.22	Maureen Burke	[illegible]	1250 Elm St Mt Home ID 83647
7-2-22	Aprin Nicolosi	[illegible]	3869 N 18E MTN Home Id 83647
7-2-22	ROBBIE NICOLOSI	[illegible]	970 N 9TH E MTN. HOME
7-2-22	Nathan Bundy	[illegible]	1110 SW Camille Mtn Home ID 83647
7-2-22	Jessica Boles	[illegible]	8011 Andrews Ct Mountain Home AFB
7-2-22	William James	[illegible]	1208 NW Nina Ct Mountain home
7-2-22	Kirsten Cherry	Kirsten Cherry	1715 SW Gabar Ct Mtn Home

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7-2-22	Harlyn Marks	Harlyn Marks	695 NW Colthorp Dr
7-2-22	Cheryl Wagner	Cheryl Wagner	695 NW Colthorp Dr
7-2-22	Reginald L Pierce	Reginald L Pierce	418 Oak Court
7-2-22	misty Pierce	misty Pierce	418 Oak ct
7-2-22	Matthew Munson		1245 Garrett ST MHJN Home
7-2-22	Ronald Allen		825 Gregory LN.
2 July 2022	ERIKA Emkey	Erika L Emkey	730 SW Nugget St. 83647
2 July 2022	Anna Burger		8529 Opell Loop MHAFB
2 July '22	Ryan Burger		11
2 July 22	Kumunti Jordan		8930B Raymond Smart Circle MHAFB
2 July 22	Katie Jordan	Katie Jordan	8930B Raymond Smart cir. MHAFB, ID
7-2-22	Jennifer Murphy		970 N 14 E Mtn Home ID 83647
7-2-22	Nicholas Fogle		8969A James Taylor Cir MHAFB
7-2-22	Ari Fogle		8969A James taylor Cir MHAFB
7-2-22	Mark Merritt		1639 Simco RD Boise Id 83716
7/2/2022	Sara Huskey	Sara Huskey	965 McKenna Dr, Mtn Home, ID 83647
7/2/22	Brayden Johnson		965 McKenna Dr. Mtn Home ID 83647
7-2/22	Lizbeth Duarte		68 n Parkside Dr Glenns Ferry, ID 83623
7-2-22	Betty Ashcraft	Betty Ashcraft	1335 Juniper St. 83647
7-2-22	Vonda Hudd	Vonda Hudd	3463 N W Canal Road, (Elmore County) 83647

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7/2/2022	Chris DeVore		730 E 4th N. Mountain Home ID 83647
7/2/2022	Mario E Alcala		760 SW Portal St Mountain Home ID 83647
7/2/2022	Marnie Alcala	Marnie alcala	↑ same
7/2/2022	Elizabeth DeVore		411 NW Garrett Ave, MTN HM
7/2/2022	Roy DeVore		605 Lago St. Mtn Hm
7/2/2022	JENN WERDEVORE		605 Lago St. Mtn. Home ID.
7/2/2022	Richard Urquidi		851 NE Sand Pebbles Ln MH.
7/2/2022	Rhonda Urquidi		851 NE Sand Pebbles Ln Mtn. He
7/2/2022	Cesar Juarez		611 N Bradbury St GF
7/2/2022	Dominique Bell		8927A Raymond Smart Cir., Mtn. Home I
7/2/2022	ADAM BYERLY		9373A HILDING JOHNSON CIR MHAFB ID
7/2/2022	ASPEN BYERLY		9373A HILDING JOHNSON CIR MHAFB ID
7/2/2022	Alexzandra Bell		8927A Raymond Smart Circ. MTN HM
7/2/22	Kim Middleton		215 S. 3rd East Mountain Home, ID 83647
7/2/22	HANNAH GUYER		215 S 3RD E MTN. HOME 83647
7/2/22	KIM SYKES		2320 N 6th E Mtn Home ID 83647
7/2/2022	Rich Sykes		2320 N 6th East Mountain Home, ID 83647
7/2/22	Darci Beeler		615 Galena Ct Mtn Home, ID 83647
7/2/22	Amber Hire		1645 SW Huebert St Mtn Home, ID 83647
7/2/22	STEVEN RAMIREZ		1691 NE QUIGLEY ST MTN HOME, ID 83647
7/2/22	Bobbilo Ramirez		1691 NE Quigley St Mtn. Home ID 83647

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7/2/2022	Rhonda Urquidi		851 NE Sand Pebbles Ln Mtn. He
7/2/2022	Cesar Juarez		61 N Bradbury St GF
7/2/2022	Dominique Bell		8927A Raymond Smart Cir., Mtn. Home I
7/2/2022	ADAM BYERLY		9373A HILDING JOHNSON CIR MHAFB ID
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7/2/2022	Rich Sykes		2320 N 6th East Mountain Home, ID 83647
7/2/22	Darci Beeler		675 Galena Ct Mtn Home, ID 83647
7/2/22	Amber Hire		645 SW Huebert St Mtn Home, ID 83647
7/2/22	STEVEN RAMIREZ		1691 NE QUIGLEY ST MTN HOME, ID 83647
7/2/22	Bobbilo Ramirez		1691 NE Quigley St Mtn. Home ID 83647

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COLLEGE OF SOUTHERN IDAHO

November 15, 2022

Mr. Matt Freeman
Executive Director
Idaho State Board of Education
650 West State Street, Suite 307
Boise, Idaho 83720

Dear Executive Director Freeman:

As you are aware, the College of Southern Idaho has been presented with a petition from qualified electors in Elmore County seeking to join the taxing district for this institution. The Elmore County election officials have determined that the presented petition reflects the signatures of more than the statutory requirement of one hundred qualified electors. Consequently, it is the interpretation that we have been presented with a valid petition.

Based on Idaho Code Section 33-2105, the College of Southern Idaho Board of Trustees has authorized the transmission of the petition to the State Board of Education. Section 33-2105 also directs that the community college board offers its recommendations to the State Board. The CSI Board of Trustees voted on November 14, 2022, to unanimously endorse the petition to the State Board, acknowledging that the underlying statute relies upon an ultimate vote of the people to determine a final outcome.

Should you have any questions, please feel free to contact Vice President for Administration Jeff Harmon or me.

Sincerely,

Dr. L. Dean Fisher
President

315 Falls Avenue • PO Box 1238 • Twin Falls Idaho 83303-1238 • 208.733.9554 • www.csi.edu

ATTACHMENT 3

IDAHO STATE BOARD OF EDUCATION
650 W. State Street | P.O. Box 83720 | Boise, Idaho 83720-0037
208-334-2270 | FAX: 208-334-2632
email: board@osbe.idaho.gov

RESOLUTION APPROVING PETITION
FOR ADDITION OF ELMORE COUNTY, IDAHO
AS TERRITORY TO COLLEGE OF SOUTHERN IDAHO
COMMUNITY COLLEGE DISTRICT

WHEREAS, Idaho Code §33-2105 authorizes qualified electors to petition for territory to be added to a community college district; and

WHEREAS, said petition must be filed with the board of trustees of the community college district; and

WHEREAS, there was filed with the College of Southern Idaho (CSI) Board of Trustees a petition for the addition of Elmore County as territory to the CSI community college district (hereinafter "CSI district"); and

WHEREAS, the Elmore County Clerk duly verified 108 petitioners' signatures as those of qualified electors; and

WHEREAS, the CSI Board of Trustees must forward its recommendations and original petition to the Idaho State Board of Education; and

WHEREAS, the CSI Board of Trustees met on November 14, 2022 and voted to endorse the petition; and

ATTACHMENT 3

WHEREAS, the recommendation and petition were transmitted to the Office of the State Board of Education on November 15, 2022 for its consideration and recommendation pursuant to Idaho Code §2105; and

WHEREAS, existing postsecondary opportunities in Elmore County, the number of prospective students for CSI, and the financial ability of CSI to provide and maintain lower-division academic and career-technical educational programs have been properly considered and reviewed by the Idaho State Board of Education.

NOW, THEREFORE, BE IT RESOLVED, by the Idaho State Board of Education:

SECTION 1. That this Board approves the petition for the addition of Elmore County to the CSI district, and recommends that an election be called for such addition on one of the election dates enumerated in Idaho Code §34-106.

SECTION 2. That a copy of this Resolution shall be delivered to the CSI Board of Trustees, Jerome County Commissioners, Twin Falls County Commissioners, and Elmore County Commissioners.

SECTION 3. That this Resolution shall become effective immediately upon its adoption and approval.

ADOPTED and APPROVED by the Idaho State Board of Education, this ___th day of _____, 2022.

APPROVED:

_____

Kurt Liebich, President

TAB	DESCRIPTION	ACTION
1	BAHR – RETIREMNT PLAN COMMITTEE – OPTIONAL RETIREMENT PLAN RFP	Information Item
2	SDE – MASTERY EDUCATION UPDATE	Information Item
3	SDE – ENGLISH LANGUAGE LEARNERS PROFICIENCY REPORT	Information Item
4	SDE - PROFESSIONAL STANDARDS COMMISSION – ANNUAL REPORT	Information Item

SUBJECT

Retirement Plan Committee Optional Retirement Plan Request for Proposals

REFERENCE

October 2021	Board approved Retirement Plan Committee recommendation to hire an Optional Retirement Plan consultant

APPLICABLE STATUTES, RULE OR POLICY

Idaho State Board of Education Governing Policies & Procedures, Sections II.K.2. and II.R.
Sections 33-107A, 33-107B, and 33-107C, Idaho Code
Section 59-513, Idaho Code

BACKGROUND

Board Policy II.R. provides that Board-sponsored plans include the 401(a) Optional Retirement Plan (ORP), and the 403(b) and 457(b) voluntary deferred compensation plans (collectively referred to hereinafter as "Plan" or "Plans"). The Board has authority to manage and control the Plans' operation and administration. The Board retains exclusive authority to amend the Plans and select trustees/custodians.

The Retirement Plan Committee (RPC) members have been discussing issuing a Request for Proposals (RFP) for Plan vendors. The plan has not undergone an RFP process since its inception. There are currently two vendors: AIG/VALIC and TIAA. At its November 18 meeting, the RPC voted to move forward with an RFP. The purpose of this agenda item is to advise the Board of that recommendation.

DISCUSSION

Staff will work with the state Division of Purchasing team to allow Multnomah Group, the Board's retirement plans consultant, to facilitate the RFP process.

Once the RFP process is complete, the Board will decide which vendor(s) to use for the Optional Retirement Plan moving forward.

IMPACT

Costs related to the RFP process will be covered by the Board's existing contract with Multnomah Group.

STAFF COMMENTS AND RECOMMENDATIONS

Staff will continue to work closely with the RPC and Multnomah to facilitate the RFP process and will provide updates as requested.

BOARD ACTION

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

SUBJECT

Mastery-Based Education Update

REFERENCE

October 2014	Board adopted recommendations for implementing the 2013 Task Force recommendations, including implementation of those regarding mastery-based education in Idaho's public schools.
May 2015	Board received a presentation from the Foundation for Excellence in Education regarding mastery-based education and possible partnership opportunities.
January 2016	Board endorsed the Governors 2016 Legislative Initiatives, including funding for the mastery-based education pilot programs
June 2017	Board received a brief update from the State Superintendent of Public Instruction on the mastery-based pilot program.
August 2017	Board received a presentation from the State Department of Education regarding the progress of the mastery-based education initiative.
December 2017	Board received an update from the State Department of Education on the implementation of the mastery-based education initiative.
February 2018	Board acted to support SB 1059 (2018), to lift the cap and expand the mastery-based education initiative and formalize the Idaho Mastery Education Network (IMEN).
October 2019	Board received an update from the Stade Department of Education regarding determining mastery for credit and financial literacy
February 2020	Board received an update on status of mastery education initiative.
October 2021	Board updated with mastery-based education efforts.

APPLICABLE STATUTE, RULE, OR POLICY

Section 33-1632. Idaho Code, Mastery-Based Education
IDAPA 08.03.03.004, Documents Incorporated by Reference, College and Career Readiness Competencies

BACKGROUND/DISCUSSION

Legislative statute and investment has allowed mastery to continue to grow across the state and create, high quality, diverse, rich, and responsive resources. 100% of the resources are available online with continual development of new and relevant resources.

The State Board of Education Idaho College and Career Readiness Competencies provide an opportunity to *unite* a diverse range of perspectives and offers students a chance to develop *Life Ready* skills.

Ongoing statute guided efforts include:

A. Provide ongoing outreach and communication
B. Facilitate and maintain the Idaho Mastery Education Network. The network shall:
   (i) Advise the superintendent of public instruction and the state board of education on the progress of the transition to mastery-based education;
   (ii) Develop evidence-based recommendations for continued implementation;
   (iii) Implement the policies of the legislature and the state board of education for the transition to mastery-based education; and
   (iv) Provide network resources, including professional development, coaching, and best practices, to Idaho public school districts and charter schools;
C. Create a sustainability plan for statewide scaling of mastery-based education

Mastery has grown over the last few years as demonstrated by the number of grant applicants and participation in statewide professional development:

- 70% Increase in the number of applicants (2022 compared to 2016-17)
- 33% Increase in the number of districts applying (2022 compared to 2016-17)
- 300 Registrants, representing 54 districts, for the Expert Keynote Series PD

IMPACT

This report will provide the Board with an update on the Master-based Education efforts in Idaho public schools.

BOARD STAFF COMMENTS AND RECOMMENDATIONS

In 2014, the Board facilitated the work of five (5) subcommittees working on recommendations for implementing the 2013 Education Improvement Task Force Recommendations. The Structure and Governance Subcommittee's responsibilities included implementation strategies for the shift to a mastery-based system where students advanced based upon content mastery, rather than seat time requirements. The subcommittee found there were no prohibitions in state law to moving to a mastery-based system, and that there is specific authorization in Administrative Code that allows school districts and charter schools to develop their own mechanisms for assessing student mastery of content and awarding credits for the mastery at the secondary level. The subcommittee recognized that there were some barriers in how school districts reported students in specific grade levels to the state for funding. However, most barriers were largely perceived rather than actual obstructions. The full recommendations may be viewed on the Board's website (https://boardofed.idaho.gov/resources/task-force-for-improving-education).

Section 33-1632, Idaho Code, requires the State Department of Education to: (a) provide ongoing statewide outreach and communication to increase awareness and understanding in mastery-based education; (b) facilitate and maintain the Idaho mastery education network; and (c) create a sustainability plan for statewide scaling of mastery-based education.

As identified by the original subcommittee of the Governor's Task Force for Improving Education, state law and Administrative Code allow for school districts and charter schools to implement a master-based education system. The purpose of the original incubators was intended to be used to identify barriers, real and perceived, that were keeping school districts from implementing mastery-based systems. Implementation of mastery-based education through the incubators identified local barriers such as student management systems and professional development needs, but no statute or administrative code changes were identified.

Working with a broad group of stakeholders and the Planning, Policy and Governmental Affairs Committee, Board staff brought forward recommendations for developing a common understanding of college and career readiness in FY 2017. The Board adopted the work group's recommendations and approved College and Career Readiness Competencies at the June 15, 2017 regular Board meeting. These competencies were then included in the state content standards and incorporated into administrative rule through the negotiated rulemaking process and became effective March 28, 2018.

BOARD ACTION

This item is for informational purposes only.

SUBJECT

Annual English Learners Proficiency Report

REFERENCE

April 2005	Board approved rule for definition of Limited English Proficient
November 2009	Board adopted The Idaho English Language Assessment Achievement Standards as a temporary rule
August 2010	Board adopted The Idaho English Language Assessment Achievement Standards as a pending rule, that was approved in November 2009
June 2014	Board approved proposed rule amendment for clarification and accuracy in definition for Limited English Proficient
November 2015	Board approved pending rule changes to IDAPA 08.02.03.105
August 2016	Board removed the Idaho English Language Assessment (IELA) Achievement Standards
December 2020	Board was provided the 2019-2020 Annual Summary report for the English Learner Program and an English Learner Proficiency update.
April 2022	Board approved addendum to ESEA Consolidated State Plan.
October 2022	Board approved amendment to ESEA Consolidated State Plan.

APPLICABLE STATUTE, RULE, OR POLICY

IDAPA 08.02.03: Rules Governing Thoroughness, subsection 004- Incorporated by Reference and subsection 111 - Assessment in Public Schools

Elementary Secondary Education Act (ESEA), as amended by the Every Student Succeeds Act (ESSA), Section 1111(c)(4)(A)(ii) English Language Proficiency.

BACKGROUND/DISCUSSION

The English Learner (EL) program assists local education agencies in creating, implementing, and maintaining researched-based programs to support students whose primary language at home is not English. Federal and state requirements help remove barriers and provide equity in learning to ensure English language learners succeed in school. Results from the WIDA ACCESS Placement Test determine program eligibility and inform each student's plan for developing English language skills. The WIDA ACCESS assessment is administered annually to all identified English learners and includes reading, writing, listening, and speaking, resulting in an overall composite score and a scale score in each of the four domains. Beginning with the 2020 ACCESS assessment, a student is considered proficient with a composite score equal to or greater than 4.2 with a minimum score

of 3.5 in the reading, writing, and listening domains and a minimum score of 1 in the speaking domain. Idaho's Consolidated State Plan, amended June 18, 2019, identifies the five-year long-term goals for English learners in making progress in achieving proficiency using 2018 data as the baseline. Information about the local education agencies program plan and allocation of funds are included in the English Learner Proficiency update.

IMPACT

This agenda item will provide the Board with an update on the English Learners program, including student proficiency data.

ATTACHMENTS

Attachment 1 – English Learner Proficiency Report
Attachment 2 – English Learner Proficiency Update

BOARD STAFF COMMENTS AND RECOMMENDATIONS

Pursuant to IDAPA 08.02.03, 111, the English Language Proficiency Assessment is part of Idaho's comprehensive assessment system and must be given annually as applicable to the student eligibility and grade range established in administrative rule. Further, the English Language Development Standards adopted by the Board are the Word-Class Instructional Design and Assessment (WIDA) 2012 English Language Development standards. In addition to these state requirements, the Board has identified the WIDA ACCESS Placement test as one of the tools used to determine a student's eligibility as an English Learner. Eligible students are then assessed annually for English Language proficiency using the WIDA Access 2.0 assessment.

BOARD ACTION

This item is for informational purposes only.

2021-2022 ANNUAL SUMMARY

Idaho English Learner Program

IDAHO STATE DEPARTMENT OF EDUCATION
ENGLISH LEARNER & TITLE III-A PROGRAM | FEDERAL PROGRAMS DEPARTMENT

Compiled by Maria A. Puga, English Learner Program Coordinator

650 W STATE STREET, 2ND FLOOR
BOISE, IDAHO 83702
208 332 6800 OFFICE
WWW.SDE.IDAHO.GOV

10.28.2022

TABLE OF CONTENTS

Background 3
State Level Summary 4-5
State English Learner Goals 6
English Language Proficency Assessment 7
List of Local Education Agency Allocations 8-11

BACKGROUND

The Idaho English Learner (EL) Program and Title III-A assist school districts with federal and state requirements of English Learners (ELs). We help districts create, implement, and maintain development programs that provide equal learning opportunities for ELs. Our goal is to assist Local Educational Agencies (LEAs) to develop their curriculum and teaching strategies which embrace each learner's unique identity to help break down barriers that prevent ELs from succeeding in school.

The Federal Program's English Learner Department oversees state and federal grant requirements, monitoring visits for all Title III-A districts, the state English Learner's 3-year Enhancement Grant, professional development activities, and the English Learner Management System (ELMS).

State Level Summary

During the 2021-2022 school year, the Idaho English Learner Program oversaw 131 English Learner educational programs. Of these LEAs, 91 had only state EL funding and 40 had both state and federal funding, through the Title III-A program. Any LEA which has at least one English Learner enrolled at their school will qualify for state EL funding. LEAs must meet a $10,000 allocation threshold to qualify for additional federal funding through the Title III-A program.

All Idaho district/charters are required, under the Title VI of the Civil Rights Act of 1964, to provide a comprehensive English language proficiency program for students who cannot speak, read, or write English well enough to participate meaningfully in educational programs. Federal and State legislation requires that district/charters provide Language Instruction Educational Programs (LIEP) and services to support the language development of EL students. As part of state and federal guidelines, each LEA includes a Home Language Survey as part of their registration process in order to initially screen students for a language other than English.

LEAs submit their English Learner plans through the Consolidated Federal and State Grant Application (CFSGA) each year. In this plan, the LEAs include their EL program information, core language instructional program, yearly goals, and an annual budget. The EL Program Coordinator reviews each plan, provides feedback and indicates where changes or additions need to be made to ensure each LEA is meeting the state and federal minimum requirements. LEAs must have their plan approved by the program coordinator before funding is distributed.

PROGRAM MONITORING

A State is required to oversee and monitor the activities of its Local Education Agencies (LEAs). In the 2021-2022 school year, seven out of 40 Title III-A LEAs were monitored through the Federal Programs Monitoring process. The SDE monitors on a 6-year cycle and uses the following factors to determine district priority:

- Coordination with other Federal Programs
- District requests for program evaluation
- New Title III-A Coordinator and/or New Superintendent
- District improvement status
- Sudden and/or significant increase in the number of English Learners

- Formal compliance complaint filed with the Idaho State Department of Education, Idaho State Board of Education and/or U.S. Department of Education - Office for Civil Rights

Title III-A monitoring involves reviewing an LEA's core instructional education program, certified staffing and proper supervision of paraprofessionals, parent engagement activities, student support, and proper use of funds. The following LEAs were monitored during the 2021-2022 school year: Wilder School District #133, Parma School District #137, Teton County School District #401, Fremont County Joint School District #215, Blaine County Joint School District #061, Homedale School District #370, and Jefferson county School District #251.

STATE ENHANCEMENT GRANTS

The English Learner (EL) Enhancement Grant Program is funded by the state of Idaho through a competitive grant process. The state legislature has earmarked $450,000 to this enhancement grant and awards range from $10,000-$85,000 depending on the chosen project. LEAs have the option of choosing from the following grant options: Implementation of Co-Teaching Model, funding for a Regional Coordinator, or Program Enhancements.

Grantee districts use the funds for additional resources to enhance core EL program services for English learners and to improve student English language skills to allow for better access to the educational opportunities offered in public schools. Grants are funded for three years (2020-2021, 2021-2022, and 2022-2023) with ongoing funding contingent on legislative funding. Each grant recipient creates yearly and three-year goals and works with a grant mentor to ensure benchmarks are being met. An annual report on goal progress by the grantees is developed each year in December on program design, use of funds, goal progress, and program effectiveness. A new grant cycle began in 2020-2021 school year with 12 new grant recipients. For this current grant cycle, there are three Co-Teaching grants, one Regional Coordinator grant, and eight Program Enhancement grants.

State English Learner Goals

The State of Idaho's English Learner Program goals taken from the 2019 Idaho Consolidated Plan reads:

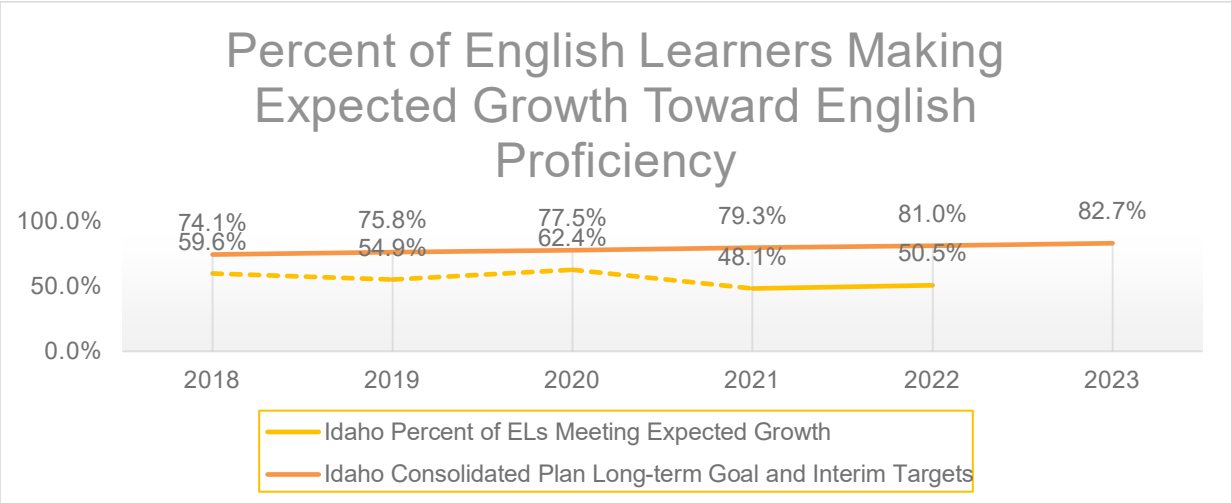
Table 6b: Percent of Students Making Expected Progress toward English proficiency 2018 baseline, 2023 long-term goal, and 2019-2022 interim targets

2018 Baseline	2019	2020	2021	2022	2023
74.07%	75.80%	77.53%	79.26%	80.98%	82.71%

Idaho will reduce the number of English learners who are not making expected progress to English proficiency, as defined above by 1/3 over five years. This five-year long-term goal has been reset to reflect the change to the expected progress, using 2018 data as the baseline.

The WIDA ACCESS assessment is administered to all identified English Learners, either electronically or paper based, and includes assessments in reading, writing, listening, and speaking. A student will receive an overall composite score and a scale score in each of the four domains. The reading and writing component are weighted 35% each, while speaking and listening are weighted 15% each in the overall composite score.

In 2021-2022, 50.5% of ELs who completed ACCESS for ELLs met the expected progress toward English proficiency metric. This was a 2.4% increase from the 2020-2021 ACCESS for ELLs test administration. According to the Idaho State Consolidated Plan, the stated goal for students making progress in 2021-2022 was 81%.

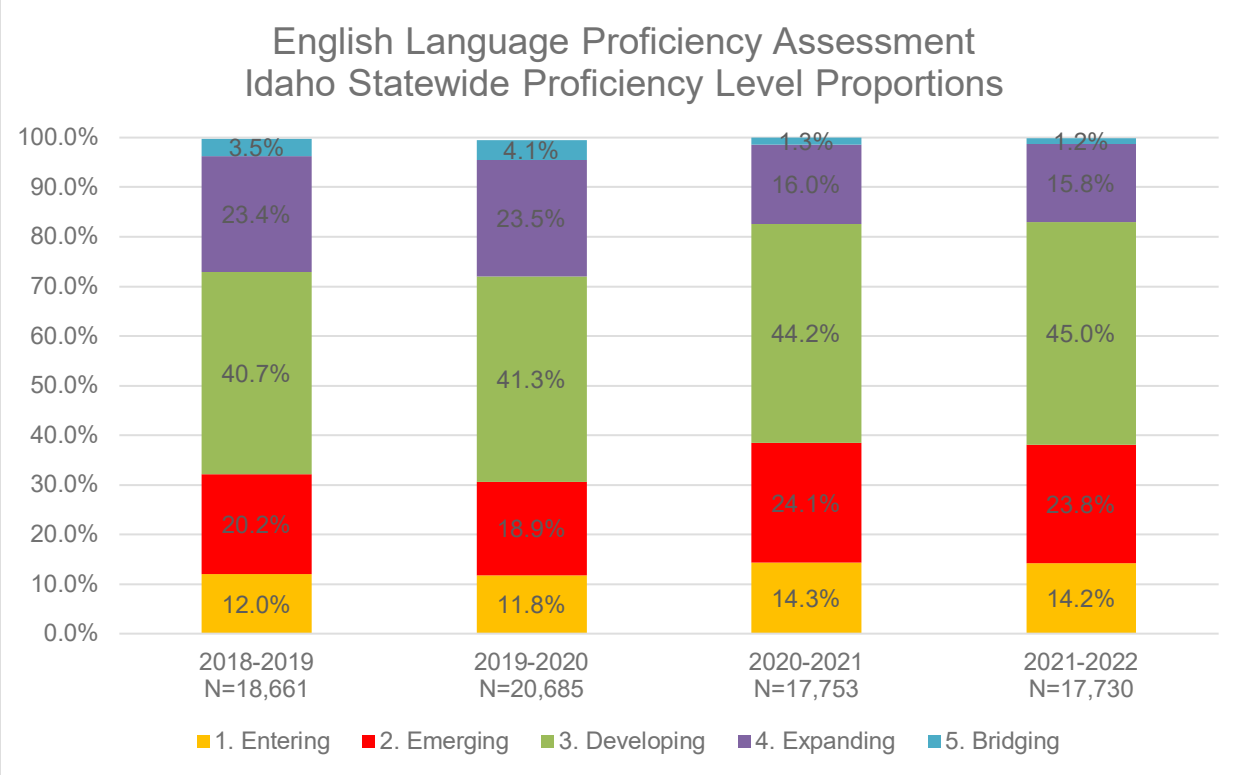


English Language Proficiency Assessment

WIDA's suite of assessments are used to screen, monitor, and exit Idaho students from a research-based language instruction educational program. Using the WIDA Screener for Kindergarten or the WIDA Screener, districts/charters are able to identify newly enrolled students for additional language support services. After identification, Idaho English learners (ELs) participate annually in a standardized English language proficiency assessment to monitor academic English language proficiency growth in four distinct language domains: Reading, Writing, Listening, and Speaking. The ACCESS for ELLs annual language proficiency assessment is typically administered from the last week in January to the first week in March.

During the 2021-2022 school year, the testing window was January 24, 2022 to March 4th, 2022. During this time period, 17,004 students completed all sections of the ACCESS test.

Below is a performance distribution chart, which reflects the percentage of students scoring at each WIDA performance level: 1- Entering, 2- Emerging, 3- Developing, 4- Expanding, 5- Bridging, and 6- Reaching. The State of Idaho has determined a 4.2 composite score as the benchmark for state proficiency.



2021-2022 List of LEA Allocations

LEAs have the opportunity of multiple funding allocations based on their EL student population. The following table shows funding allocations for: State EL Allocations, Federal Title III-A Allocations, Title III-A Immigrant Allocations, and State Enhancement Grant Allocations.
*Title III-A LEAs for federal monitoring purposes.

LEA Name	EL Student Population	State EL Allocation	Title III-A Allocation	Title III-A Immigrant Allocation	State Enhancement Grant Allocations
BOISE INDEPENDENT DISTRICT	1,885	$455,586	$260,121	$0	$15,000
NAMPA SCHOOL DISTRICT	1,705	$412,082	$235,288	$0	$0
West Ada School District	1,433	$346,342	$197,752	$0	$0
CALDWELL DISTRICT	1,054	$254,741	$145,450	$0	$0
VALLIVUE SCHOOL DISTRICT	973	$235,165	$134,273	$0	$0
JEROME JOINT DISTRICT	921	$222,597	$127,097	$0	$15,000
TWIN FALLS DISTRICT	764	$184,651	$105,431	$0	$100,000
IDAHO FALLS DISTRICT	644	$155,648	$88,871	$0	$0
CASSIA COUNTY JOINT DISTRICT	633	$152,990	$87,353	$0	$0
MINIDOKA COUNTY JOINT DISTRICT	591	$142,839	$81,557	$0	$0
BLAINE COUNTY DISTRICT	577	$139,455	$79,625	$0	$85,000
BONNEVILLE JOINT DISTRICT	536	$129,546	$73,967	$0	$0
WENDELL DISTRICT	388	$93,776	$53,543	$0	$0
BLACKFOOT DISTRICT	317	$76,616	$43,746	$0	$15,000
AMERICAN FALLS JOINT DISTRICT	304	$73,474	$41,952	$0	$0
JEFFERSON COUNTY JT DISTRICT	266	$64,290	$36,708	$0	$85,000
MOUNTAIN HOME DISTRICT	255	$61,631	$35,190	$0	$0
TETON COUNTY DISTRICT	253	$61,148	$34,914	$0	$85,000
ABERDEEN DISTRICT	231	$55,830	$31,878	$0	$0
KUNA JOINT DISTRICT	224	$54,139	$30,912	$0	$0
BUHL JOINT DISTRICT	198	$47,855	$27,324	$0	$0
GOODING JOINT DISTRICT	193	$46,646	$26,634	$0	$15,000
HERITAGE COMMUNITY CHARTER DISTRICT	170	$41,087	$23,460	$0	$10,000
FREMONT COUNTY JOINT DISTRICT	151	$36,495	$20,838	$0	$0
MADISON DISTRICT	151	$36,495	$20,838	$0	$0
PAYETTE JOINT DISTRICT	147	$35,528	$20,286	$0	$0
HOMEDALE JOINT DISTRICT	146	$35,287	$20,148	$0	$0
MARSING JOINT DISTRICT	141	$34,078	$19,458	$0	$0

FRUITLAND DISTRICT	126	$30,453	$17,388	$0	$0
WILDER DISTRICT	124	$29,970	$17,112	$0	$0
POCATELLO DISTRICT	121	$29,245	$16,698	$0	$0
MIDDLETON DISTRICT	121	$29,245	$16,698	$0	$0
SHOSHONE JOINT DISTRICT	120	$29,003	$16,560	$0	$0
WEISER DISTRICT	105	$25,377	$14,490	$0	$0
VALLEY DISTRICT	102	$24,652	$14,076	$0	$0
SNAKE RIVER DISTRICT	94	$22,719	$12,972	$0	$0
EMMETT INDEPENDENT DIST	91	$21,994	$12,558	$0	$0
SHELLEY JOINT DISTRICT	87	$21,027	$12,006	$0	$0
KIMBERLY DISTRICT	83	$20,060	$11,454	$0	$0
PARMA DISTRICT	81	$19,577	$11,178	$0	$0
MELBA JOINT DISTRICT	73	$17,643	$0	$0	$0
PRESTON JOINT DISTRICT	71	$17,160	$0	$0	$0
IDAHO ARTS CHARTER SCHOOL	67	$16,193	$0	$0	$15,000
FILER DISTRICT	59	$14,260	$0	$0	$0
COEUR D ALENE DISTRICT	56	$13,535	$0	$0	$0
ELEVATE ACADEMY	55	$13,293	$0	$0	$0
MOSCOW DISTRICT	54	$13,051	$0	$0	$0
Future Public School	54	$13,051	$0	$0	$0
SUGAR-SALEM JOINT DISTRICT	52	$12,568	$0	$0	$0
GLENNS FERRY JOINT DISTRICT	49	$11,843	$0	$0	$0
MURTAUGH JOINT DISTRICT	43	$10,393	$0	$0	$0
NEW PLYMOUTH DISTRICT	39	$9,426	$0	$0	$0
Gem Prep Nampa	38	$9,184	$0	$0	$0
NOTUS DISTRICT	37	$8,943	$0	$0	$0
WEST JEFFERSON DISTRICT	36	$8,701	$0	$0	$0
HANSEN DISTRICT	35	$8,459	$0	$0	$0
IDAHO VIRTUAL ACADEMY	35	$8,459	$0	$0	$0
CASTLEFORD DISTRICT	33	$7,976	$0	$0	$0
MCCALL-DONNELLY JT. SCHOOL DISTRICT	30	$7,251	$0	$0	$0
COMPASS CHARTER SCHOOL	30	$7,251	$0	$0	$0
BRUNEAU-GRAND VIEW JOINT SCHOOL DISTRICT	29	$7,009	$0	$0	$0
INSPIRE VIRTUAL CHARTER	27	$6,526	$0	$0	$0
HERITAGE ACADEMY DISTRICT	27	$6,526	$0	$0	$0
LAKE PEND OREILLE SCHOOL DISTRICT	26	$6,284	$0	$0	$0
FIRTH DISTRICT	25	$6,042	$0	$0	$0

POST FALLS DISTRICT	25	$6,042	$0	$0	$0
CLARK COUNTY DISTRICT	24	$5,801	$0	$0	$0
MOSAICS PUBLIC SCHOOL, INC	24	$5,801	$0	$0	$0
ONEIDA COUNTY DISTRICT	23	$5,559	$0	$0	$0
SAGE INTERNATIONAL SCHOOL OF BOISE	23	$5,559	$0	$0	$0
HAGERMAN JOINT DISTRICT	22	$5,317	$0	$0	$0
ANOTHER CHOICE VIRTUAL CHARTER DISTRICT	20	$4,834	$0	$0	$0
DIETRICH DISTRICT	19	$4,592	$0	$0	$0
BLACKFOOT CHARTER COMMUNITY LEARNING CENTER	18	$4,350	$0	$0	$0
BLISS JOINT DISTRICT	17	$4,109	$0	$0	$0
TREASURE VALLEY CLASSICAL ACADEMY CHARTER	17	$4,109	$0	$0	$0
RIRIE JOINT DISTRICT	16	$3,867	$0	$0	$0
XAVIER CHARTER SCHOOL	16	$3,867	$0	$0	$0
RICHFIELD DISTRICT	14	$3,384	$0	$0	$0
LAKELAND DISTRICT	13	$3,142	$0	$0	$0
LEWISTON INDEPENDENT DISTRICT	13	$3,142	$0	$0	$0
THE VILLAGE CHARTER SCHOOL DISTRICT	13	$3,142	$0	$0	$0
THOMAS JEFFERSON CHARTER	13	$3,142	$0	$0	$0
VISION CHARTER SCHOOL	9	$2,175	$0	$0	$0
ROLLING HILLS CHARTER SCHOOL	7	$1,692	$0	$0	$0
WHITE PINE CHARTER SCHOOL	7	$1,692	$0	$0	$0
ANSER OF IDAHO, INC.	7	$1,692	$0	$0	$0
Pathways in Education Nampa	7	$1,692	$0	$0	$0
Gem Prep Meridian	7	$1,692	$0	$0	$0
iSUCCEED VIRTUAL HIGH SCHOOL	6	$1,450	$0	$0	$0
IDAHO SCIENCE and TECHNOLOGY CHARTER	6	$1,450	$0	$0	$0
PEACE VALLEY CHARTER SCHOOL INC.	6	$1,450	$0	$0	$0
DORAL ACADEMY OF IDAHO, INC	6	$1,450	$0	$0	$0
MEADOWS VALLEY DISTRICT	5	$1,208	$0	$0	$0
VICTORY CHARTER SCHOOL	5	$1,208	$0	$0	$0
MONTICELLO MONTESSORI CHARTER SCHOOL	5	$1,208	$0	$0	$0
Syringa Mountain School INC	5	$1,208	$0	$0	$0
Forrester Academy Inc	5	$1,208	$0	$0	$0

Garden Valley	4	$967	$0	$0	$0
GRACE JOINT DISTRICT	4	$967	$0	$0	$0
FALCON RIDGE CHARTER SCHOOL	4	$967	$0	$0	$0
NORTH VALLEY ACADEMY	4	$967	$0	$0	$0
NORTH STAR CHARTER DISTRICT	4	$967	$0	$0	$0
GEM PREP: POCATELLO INC.	4	$967	$0	$0	$0
HORSESHOE BEND SCHOOL DISTRICT	3	$725	$0	$0	$0
BOUNDARY COUNTY DISTRICT	3	$725	$0	$0	$0
Idaho Stem Academy	3	$725	$0	$0	$0
Gem Prep Online	3	$725	$0	$0	$0
FORGE INTERNATIONAL LLC	3	$725	$0	$0	$0
BASIN SCHOOL DISTRICT	2	$483	$0	$0	$0
OROFINO JOINT DISTRICT	2	$483	$0	$0	$0
CHALLIS JOINT DISTRICT	2	$483	$0	$0	$0
WEST SIDE JOINT DISTRICT	2	$483	$0	$0	$0
SOUTH LEMHI DISTRICT	2	$483	$0	$0	$0
KELLOGG JOINT DISTRICT	2	$483	$0	$0	$0
LIBERTY CHARTER	2	$483	$0	$0	$0
PALOUSE PRAIRIE EDUCATIONAL ORGANIZATION, INC.	2	$483	$0	$0	$0
POCATELLO COMMUNITY CHARTER	2	$483	$0	$0	$0
PROJECT IMPACT STEM ACADEMY, INC.	2	$483	$0	$0	$0
PINECREST ACADEMY OF IDAHO, INC.	2	$483	$0	$0	$0
ST MARIES JOINT DISTRICT	1	$242	$0	$0	$0
WEST BONNER COUNTY DISTRICT	1	$242	$0	$0	$0
BUTTE COUNTY JOINT DISTRICT	1	$242	$0	$0	$0
TROY SCHOOL DISTRICT	1	$242	$0	$0	$0
SALMON DISTRICT	1	$242	$0	$0	$0
TAYLORS CROSSING CHARTER SCHOOL	1	$242	$0	$0	$0
LEGACY CHARTER SCHOOL DISTRICT	1	$242	$0	$0	$0
AMERICAN HERITAGE CHARTER DISTRICT	1	$242	$0	$0	$0
IDAHO COLLEGE AND CAREER READINESS ACADEMY INC.	1	$242	$0	$0	$0
CANYON-OWYHEE SCHOOL SERVICE AGENCY (COSSA)	1	$242	$0	$0	$0
MOSCOW CHARTER SCHOOL	1	$242	$0	$0	$0

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Idaho English Learner Proficiency Update

State Board Meeting, December 21, 2022

Supporting Schools and Students to Achieve

SHERRI YBARRA, ED.S., SUPERINTENDENT OF PUBLIC INSTRUCTION

State Board Meeting 12.21.2022

Federal and State Support for English Learners

1. Title VI of the Civil Rights Act of 1964 and Lau v Nichols (1974)
2. Idaho Code 33-1617 – English Learner Program Requirements
3. Idaho Consolidated State Plan
4. Elementary and Secondary Education Act (ESEA), Title III-A
5. Consolidated Federal and State Grant Application (CFSGA)

State Board Meeting 12.21.2022

Idaho English Learner Program Oversees…

- State and Federal Grant Requirements
- Monitoring Visits for Title III-A districts
- State 3-year English Enhancement Grant
- Professional Development Activities
- Digital Adaptive Curriculum Contract-Curriculum Associates & Imagine Learning
- English Learner Management System (ELMS)

Go-To Strategies
Guiding Educators to Scaffold Content Language

Idaho State Department of Education
Title III Consortium

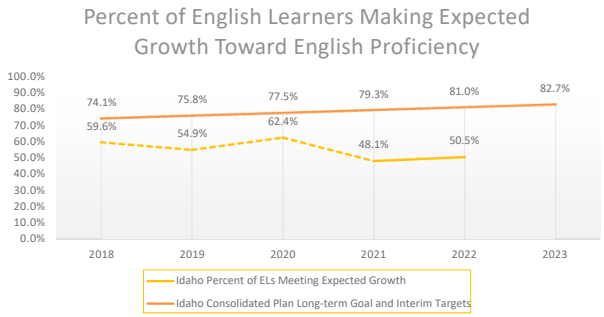
ELMS
ENGLISH LEARNER MANAGEMENT SYSTEM

State Board Meeting 12.21.2022

Idaho's Progress to Proficiency Goals

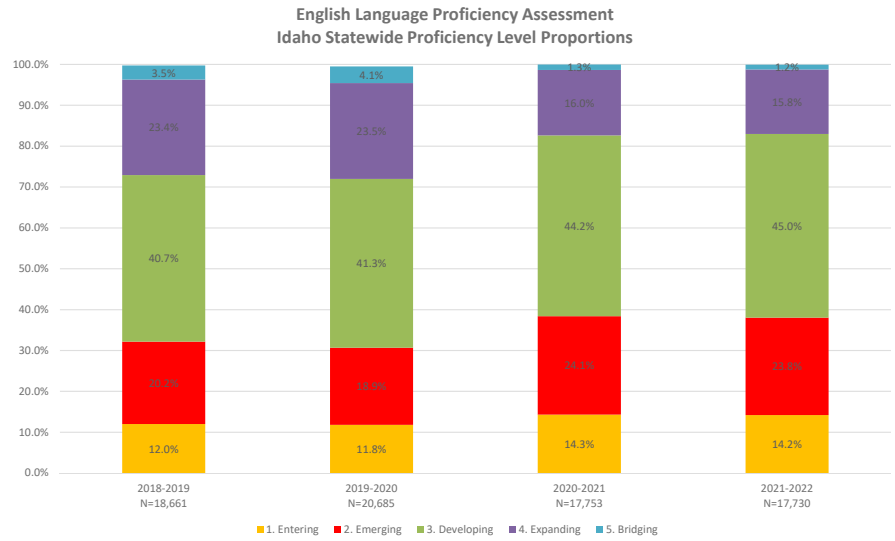
Table 6b: Percent of Students Making Expected Progress toward English proficiency 2018 baseline, 2023 long-term goal, and 2019-2022 interim targets

2018 Baseline	2019	2020	2021	2022	2023
74.07%	75.80%	77.53%	79.26%	80.98%	82.71%



State Board Meeting 12.21.2022

English Language Proficiency Assessment Performance



State Board Meeting 12.21.2022

2021-2022 LEA Allocations

State Support for English Learners- $241 PP

# of LEAs	State EL Population	State EL Allocations	State Enhancement Grant Allocations
131	18,081	$4,370,000	$455,000

Federal Support for English Learners- $138 PP

# of LEAs	Title III-A Student Population	Federal Title III-A Allocations	Federal Title III-A Immigrant Allocations
40	16,506	$2,277,804	$0

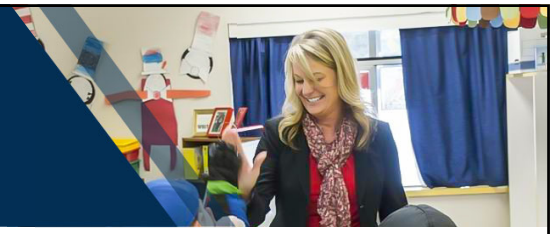
State Board Meeting 12.21.2022

Recommendations for Program Progress

1. Increase professional development opportunities for general education teachers who work with EL students through the Go to Strategies training
2. Increase professional development opportunities in collaborative planning and co-teaching model through the Enhancement Grant
3. Provide curricular and instructional support for learning loss during the past two school years

State Board Meeting 12.21.2022

Questions? Comments?



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Supporting Schools and Students to Achieve
SHERRI YBARRA, ED.S., SUPERINTENDENT OF PUBLIC INSTRUCTION

State Board Meeting 12.21.2022

PROFESSIONAL STANDARDS COMMISSION

SUBJECT

Professional Standards Commission 2021-2022 Annual Report

REFERENCE

December 2019	Board accepted the Professional Standards Commission 2018-2019 Annual Report
December 2020	Board accepted the Professional Standards Commission 2019-2020 Annual Report
December 2021	Board accepted the Professional Standards Commission 2020-2021 Annual Report

APPLICABLE STATUTE, RULE, OR POLICY

State Board of Education Governing Policies and Procedures, Section IV.B.
Sections 33-1208, 33-1251, 33-1252, 33-1253, 33-1254, and 33-1258, Idaho Code

BACKGROUND/DISCUSSION

The 1972 state legislature established the Professional Standards Commission (PSC). This legislative action combined the Professional Practices Commission, established by the state legislature in 1969, with the Professional Standards Board, an advisory board appointed by the State Board of Education. The PSC consists of 18 constituency members appointed for terms of three years, the membership of which is prescribed in Section 33-1252, Idaho Code:

- Secondary or Elementary Classroom Teacher (5)
- Exceptional Child Teacher (1)
- School Counselor (1)
- Elementary School Principal (1)
- Secondary School Principal (1)
- Special Education Director (1)
- School Superintendent (1)
- School Board Member (1)
- Public Higher Education Faculty Member (2)
- Private Higher Education Faculty Member (1)
- Public Higher Education Letters and Sciences Faculty Member (1)
- State Career & Technical Education Staff Member (1)
- State Department of Education Staff Member (1)

The PSC publishes an annual report following the conclusion of each fiscal year to inform the State Board of Education of the PSC's accomplishments.

IMPACT

The PSC makes recommendations to the State Board of Education and renders decisions that provide Idaho with competent, qualified, ethical educators dedicated to rigorous standards, student achievement, and improved professional practice.

ATTACHMENTS

Attachment 1 – PSC 2021-2022 Annual Report

STAFF COMMENTS AND RECOMMENDATIONS

Pursuant to Board Policy IV.B. the Department is required to provide the Board with an annual report on regarding certificated personnel. This requirement in met in part through the annual Professional Standards Commission report.

The Professional Standards Commission is established through Section 33-1252, Idaho Code. The commission is made up of 18 members appointed by the State Board of Education. Membership is made up of individuals representing the teaching profession in Idaho, including a staff person from the Department of Education and the Division of Career Technical Education. No less than seven members must be certificated classroom teachers, of which at least one must be a teacher of exceptional children and one must serve in pupil personnel services. The purpose of the Professional Standards Commission is to make recommendations regarding professional codes and standards of ethics to the State Board of Education and is authorized to investigate complaints regarding the violation of such standards and makes recommendations to the Board in areas of educator certification and educator preparation standards.

The Professional Standards Commission report includes the number of alternative authorizations for interim certificates that have been issued during the previous school year. Interim certificates are issued to all individuals who are approved for an alternate authorization or non-traditional route to certification. There are currently four non-traditional preparation programs approved in Idaho: American Board for Certification of Teacher Excellence (ABCTE), Teach for America (TFA) College of Southern Idaho, and Lewis-Clark State College. Alternate authorizations are also available for existing instructional staff as an expedited route for adding endorsements to an existing certificate or as a route for earning a new certificate, such as an administrator or pupil service staff certificate. There are four alternative authorization options educators may use to add an endorsement to an existing certificate. These include:

- Assurance from an approved educator preparation program that the individual is competent in the field they are seeking the endorsement in,
- National Board Certification in the content specific area they are seeking endorsement in,
- Earning a graduate degree in the content specific area they are seeking endorsement in, or
- Proof of competency in the content specific area through a Board approved assessment.

Alternate authorizations for certification are available through three pathways in addition to the Board-approved non-traditional routes to certification. These include:

- Teacher to New Certification – this route is available to individuals with an existing certification to add an additional certification. Examples would be a teacher with an instructional staff certificate adding an occupational specialist certificate so they could teach both career technical and non-career technical courses, or an individual with an instructional staff certificate adding a pupil service staff certificate with a school counselor endorsement. This alternative authorization should not be confused with the alternative route for adding new endorsements to an existing certificate.
- Content Specialist – this route provides an expedited route to certification for individuals who are uniquely qualified in a subject area but have not gone through a traditional educator preparation route. An example would be an individual with industry experience in a content area or has deep content knowledge, such as a degree in engineering, but did not go through a traditional educator preparation program. While this route was originally used primarily for filing vacancies in emergency situations, it was amended a few years ago to recognize not all quality educators enter the classroom through a traditional route and to allow non-traditional candidates to enter the classroom while still ensuring they meet quality standards.
- Pupil Service Staff – this route provides a mechanism for school districts to fill pupil service staff positions when they cannot find someone with a correct endorsement or certification.

Individuals on any of the Board-approved alternate routes or non-traditional educator preparation programs receive an up to three-year non-renewable interim certificate. During their time on the interim certificate, they must complete the requirements of their chosen alternative route preparation program. This program could range from a formal alternative route preparation program with a Board-approved educator preparation program or could be an individual agreement developed by a consortium comprised of the certificate holder, designee from an approved educator preparation program, and a representative of the school district. For the Content Specialist route, it is the responsibility of the school district to assure the individual is qualified to teach in the area of identified need and that they are making adequate annual progress toward standard certification while on the interim certificate.

BOARD ACTION

This item is for informational purposes only.

PROFESSIONAL STANDARDS COMMISSION

ANNUAL REPORT

2021-2022

Table of Contents

Table of Contents 2
Introduction 3
Internal Operation of the Commission 6
Alternative Authorizations 7
Requests for Content Specialist Authorizations 8
Requests for Teacher to New Certificate Authorizations 10
Requests for Teacher to New Endorsement Authorizations 11
Requests for Pupil Service Staff Authorizations 13
Requests for Emergency Provisional Certificate 14
Executive Committee Activities 16
Standards Committee Activities 19
Educator Preparation Standards Reviews 19
Educator Preparation Program Reviews 20
Educator Preparation New Program Proposal Reviews 21
Appendix – Fiscal Year 2022 Budget Expenditures 22

INTRODUCTION

The 1972 state legislature established the Professional Standards Commission (PSC). This legislative action combined the Professional Practices Commission, established by the state legislature in 1969, with the Professional Standards Board, an advisory board appointed by the State Board of Education. The Commission consists of 18 constituency members appointed or reappointed for terms of three years:

- Secondary or Elementary Classroom Teacher (5)
- Exceptional Child Teacher (1)
- Pupil Service Staff (1)
- Elementary School Principal (1)
- Secondary School Principal (1)
- Special Education Director (1)
- School Superintendent (1)
- School Board Member (1)
- Public Higher Education Faculty Member (2)
- Private Higher Education Faculty Member (1)
- Higher Education Letters and Sciences Faculty Member (1)
- State Career & Technical Education Staff Member (1)
- State Department of Education Staff Member (1)

For further detail regarding the establishment and membership of the Professional Standards Commission, see Idaho Code §33-1252.

PSC Vision

The PSC will continue to provide leadership for professional standards and accountability in Idaho's schools. We will handle that responsibility with respect and in a timely fashion. We will nurture positive relationships and collaborative efforts with a wide range of stakeholders. We will be a powerful voice advocating on behalf of Idaho's children.

PSC Mission

The PSC makes recommendations to the State Board of Education and renders decisions that provide Idaho with competent, qualified, ethical educators dedicated to rigorous standards, pre-K-12 student achievement, and improved professional practice.

Statutory Responsibilities of the Professional Standards Commission

The professional standards commission may conduct investigations on any signed allegation of unethical conduct of any teacher brought by:

An individual with a substantial interest in the matter, except a student in an Idaho public school; or

A local board of trustees.

Idaho Code §33-1209

The commission shall have authority to adopt recognized professional codes and standards of ethics, conduct and professional practices which shall be applicable to teachers in the public schools of the state, and submit the same to the state board of education for its consideration and approval. Upon their approval by the state board of education, the professional codes and standards shall be published by the board.

Idaho Code §33-1254

The commission may make recommendations to the state board of education in such areas as teacher education, teacher certification and teaching standards, and such recommendations to the state board of education or to boards of trustees of school districts as, in its judgment, will promote improvement of professional practices and competence of the teaching profession of this state, it being the intent of this act to continually improve the quality of education in the public schools of this state.

Idaho Code §33-1258

Professional Standards Commission Membership

During the 2021-2022 academic year, the PSC met six times: July (Special Meeting), September, December, February, April, and June. The following individuals served as members of the PSC:

Name	Agency	Representing
Tate Castleton	Homedale School District #370	Elementary School Principals
Steve Copmann, Vice Chair	Cassia County School District #151	Secondary School Principals
Kathy Davis, Chair	St. Maries School District #41	Secondary Classroom Teachers
Kristi Enger	Idaho Career & Technical Education	Career & Technical Education
Angela Gilman	Idaho Falls School District #091	Elementary Classroom Teachers
Mark Gorton	Lakeland School District #272	Secondary Classroom Teachers
Chanel Harming	Lapwai School District #341	Secondary Classroom Teachers
Mark Haynal	Lewis Clark State College	Public Higher Education
Katie Horner	Murtaugh School District #418	Secondary Classroom Teachers
Paula Kellerer	Nampa School District #131	School Superintendents
Ramona Lee	West Ada School District #2	Special Education Administrators
Peter McPherson	Idaho State Department of Education	Department of Education
Jamee Nixon	Northwest Nazarene University	Colleges of Letters and Sciences
Karen Pyron	Butte County School District #111	School Board Members
LoriAnn Sanchez	Northwest Nazarene University	Private Teacher Education
Marianne Sletteland	Moscow School District #281	Exceptional Child Teachers
Mike Wilkinson	Twin Falls School District #411	Pupil Service Staff
Emma Wood	Idaho State University	Public Teacher Education

INTERNAL OPERATION OF THE COMMISSION

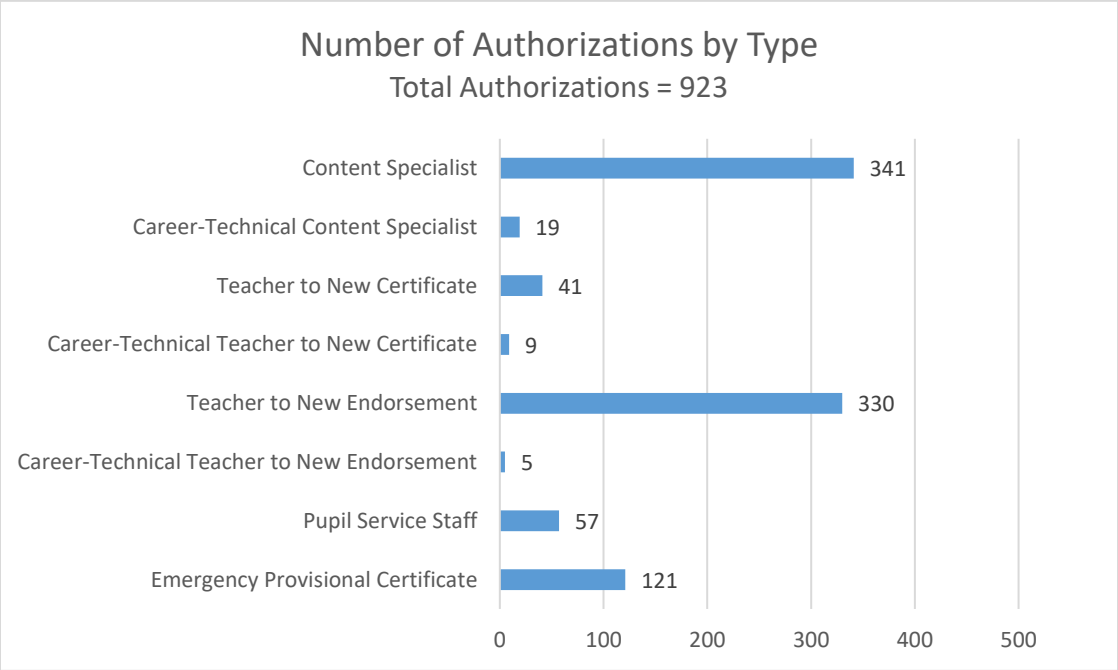
The PSC has four standing committees with specific duties:

1. **Authorizations Committee**
   - Reviews and makes recommendations to the PSC regarding:
     - Approval of atypical alternative authorizations to teach, serve as an administrator, or provide pupil service staff services.
       - *Alternative Authorization – Content Specialist*: Allows a candidate who does not hold a valid Idaho credential to serve in an assignment while they work toward obtaining the applicable certificate/endorsement.
       - *Alternative Authorization – Pupil Service Staff*: Allows a candidate who does not hold a valid Idaho credential to serve in an assignment that requires the Pupil Service Staff Certificate while they work toward obtaining the applicable endorsement. The Alternative Authorization-Pupil Service Staff can only be used for School Counselor or School Social-Worker
       - *Alternative Authorization – Teacher to New*: Allows a candidate who already holds a valid Idaho credential to serve in an assignment while they work toward obtaining the applicable certificate/endorsement.
     - Policies and procedures for alternative authorizations;
     - The development and publishing of certification reports as needed.
2. **Budget Committee**
   - Develops a yearly budget.
   - Monitors and makes recommended revisions to the annual budget.
3. **Executive Committee**
   - Reviews, maintains, and revises the Code of Ethics for Idaho Professional Educators as needed.
   - Determines if there is probable cause to pursue discipline against a certificated educator for alleged unethical conduct.
4. **Standards Committee**
   - Develops recommendations for preservice educator standards for consideration by the State Board of Education.
   - Develops, maintains, and implements review processes for educator preparation programs for consideration by the State Board of Education;
   - Develops and provides recommendations to the PSC for educator assessment(s) and qualifying scores for consideration by the State Board of Education.
   - Develops and provides recommendations to the PSC for educator certificate and endorsement requirements for consideration by the State Board of Education.

ALTERNATIVE AUTHORIZATIONS

Local school districts, including charter schools or other educational agencies, may request approval of an alternative authorization for an individual to fill a certificated position when he/she does not presently hold an appropriate Idaho educator certificate/endorsement. The individual must have a plan that leads to certification in the assigned area.

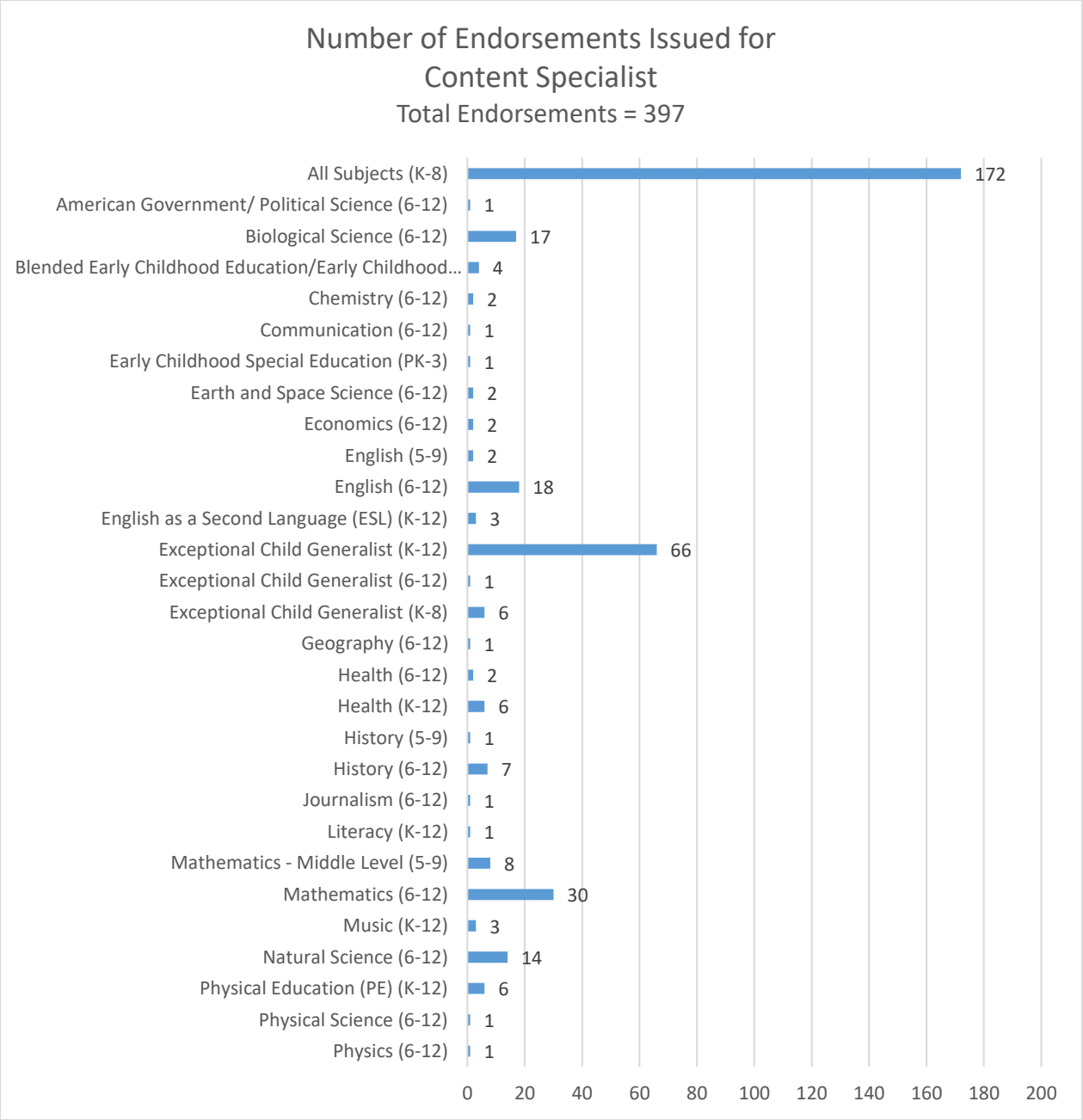
For further detail regarding alternative authorizations, see Alternative Authorizations website.

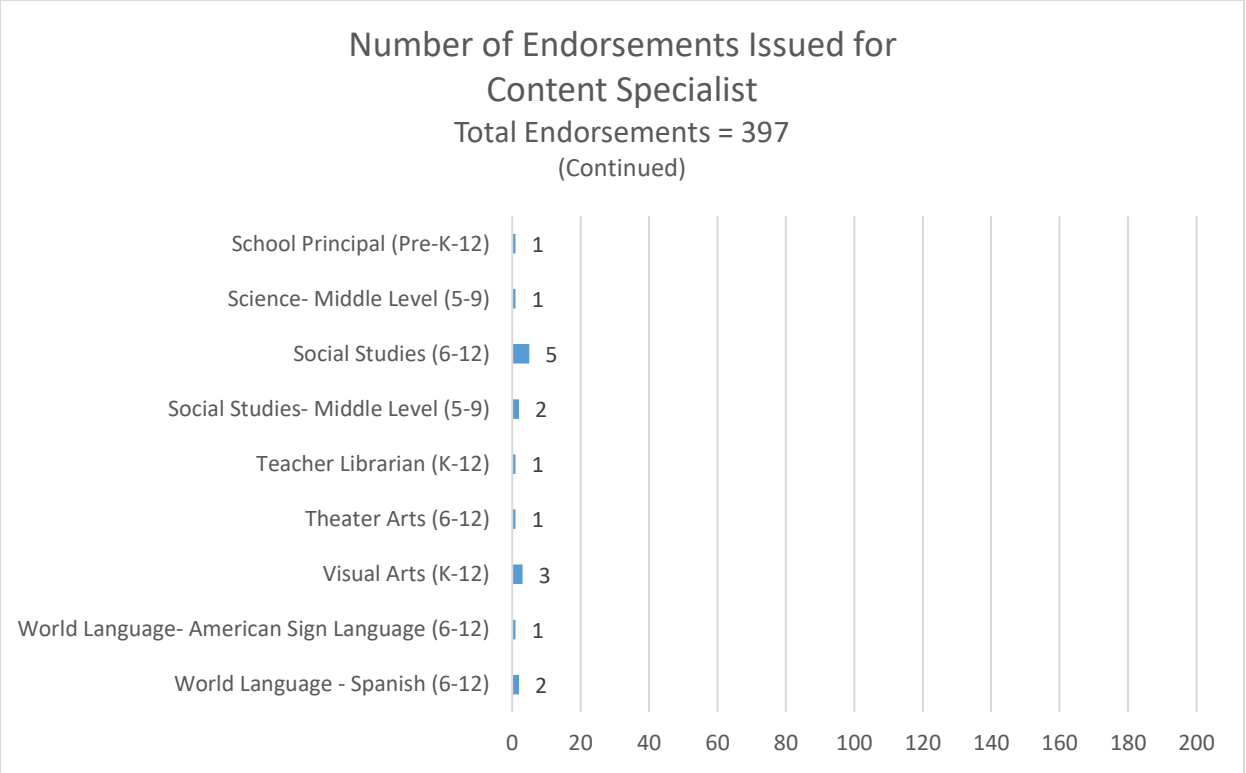


There were 20,983 total certificated educators employed statewide during the 2021-2022 school year. The percentage of educators working with an alternative authorization was 4.4% percent.

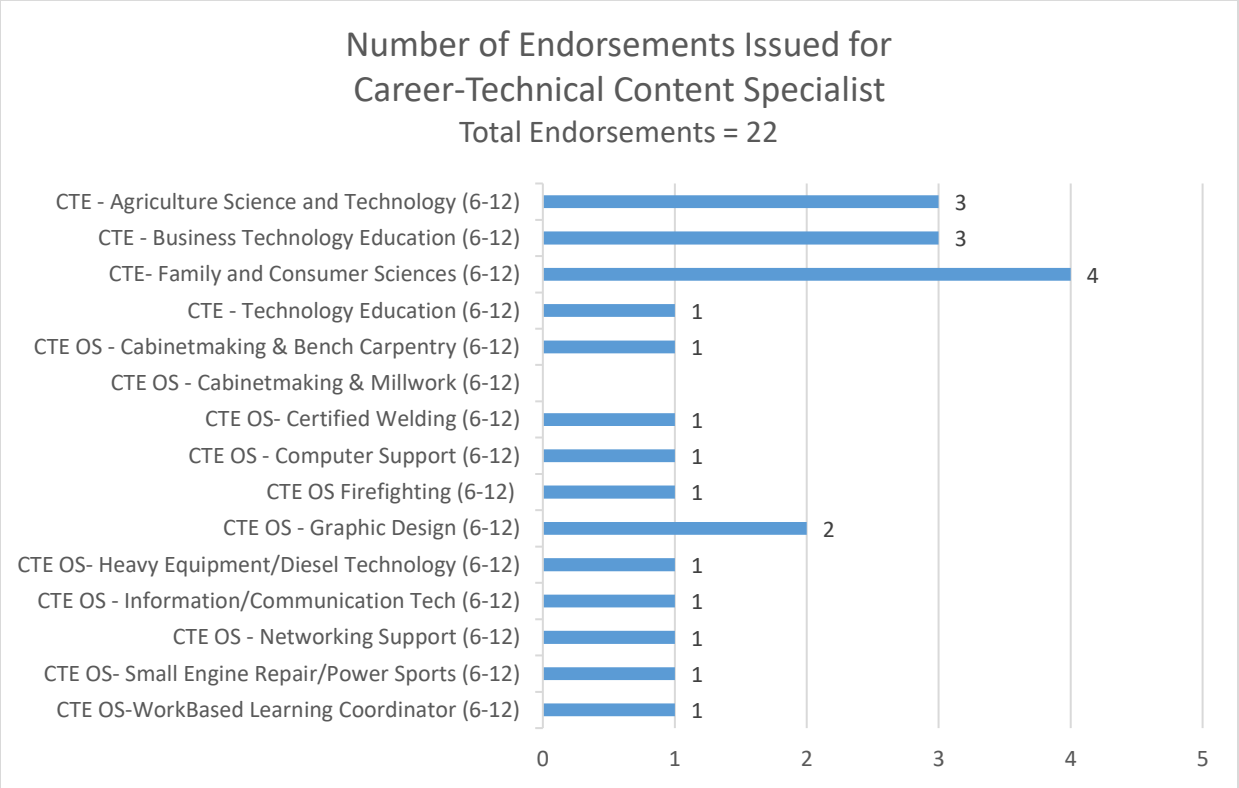
REQUESTS FOR CONTENT SPECIALIST AUTHORIZATIONS

The purpose of this authorization is to allow an Idaho school district/charter to hire a candidate who does not hold a valid Idaho credential to serve in an assignment that requires certification/endorsement. The district must show that the candidate is uniquely qualified to serve in the assignment while the candidate works toward obtaining the applicable certificate/endorsement. There were 341 Content Specialist authorizations with 397 total endorsements issued during the 2021-2022 school year.



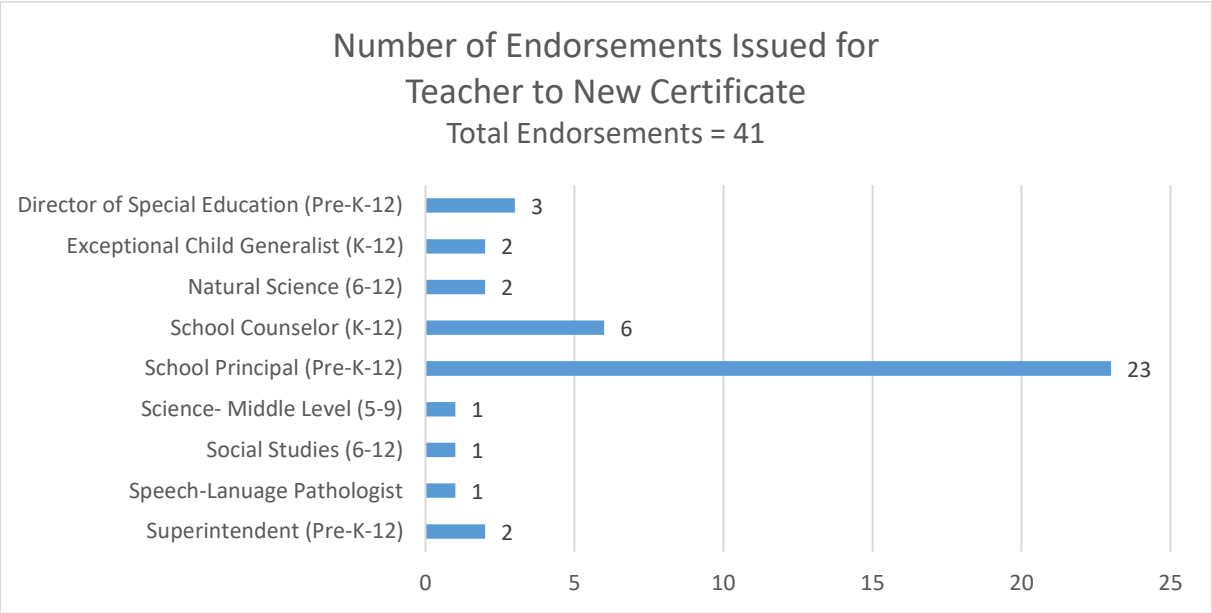


There were 19 Career-Technical Content Specialist authorizations with 22 total endorsements issued during the 2021-2022 school year.

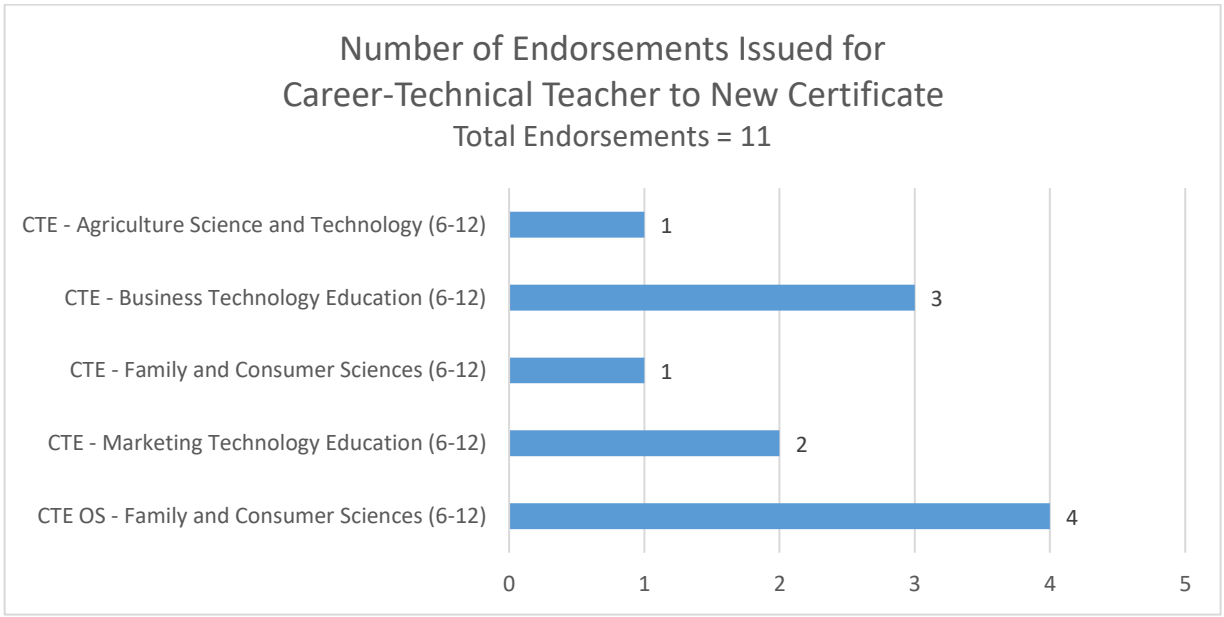


REQUESTS FOR TEACHER TO NEW CERTIFICATE AUTHORIZATIONS

The purpose of this authorization is to allow an Idaho school district/charter to hire a candidate who holds a valid Idaho credential to serve in an assignment for which the candidate does not hold the appropriate certificate and endorsement. There were 41 Teacher to New Certificate authorizations with 41 total endorsements issued during the 2021-2022 school year.

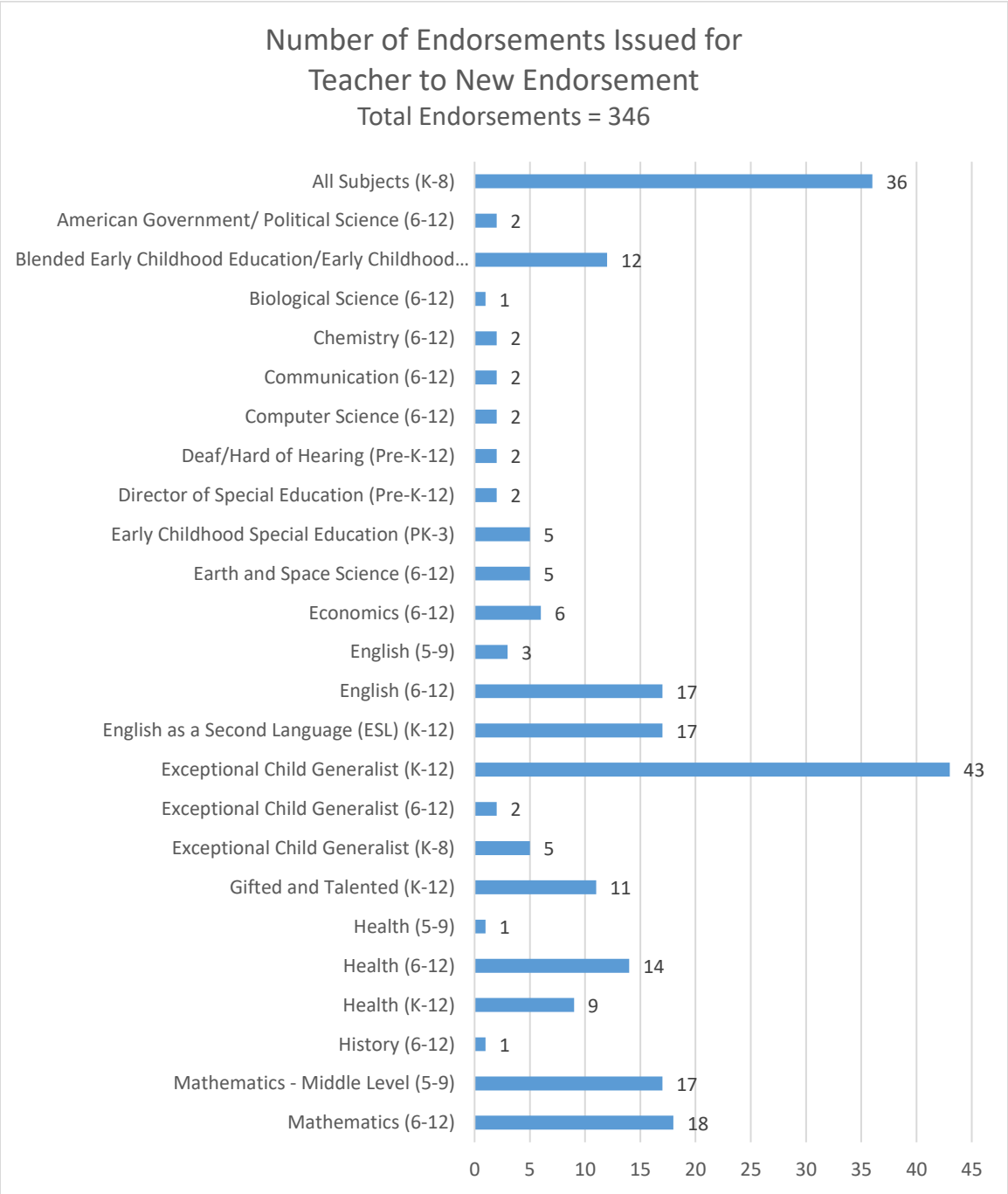


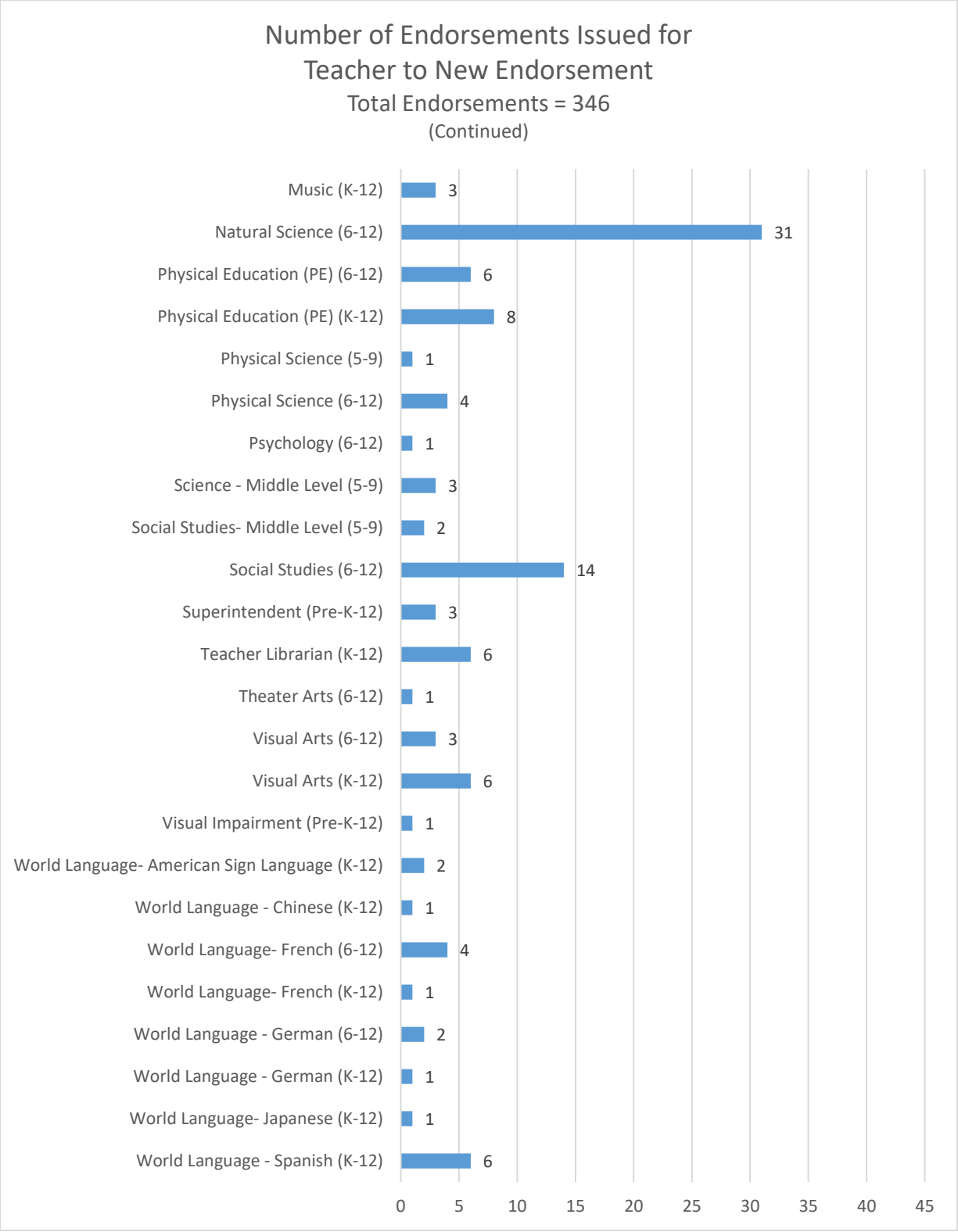
There were 9 Career-Technical Teacher to New Certificate authorizations with 11 total endorsements issued during the 2021-2022 school year.



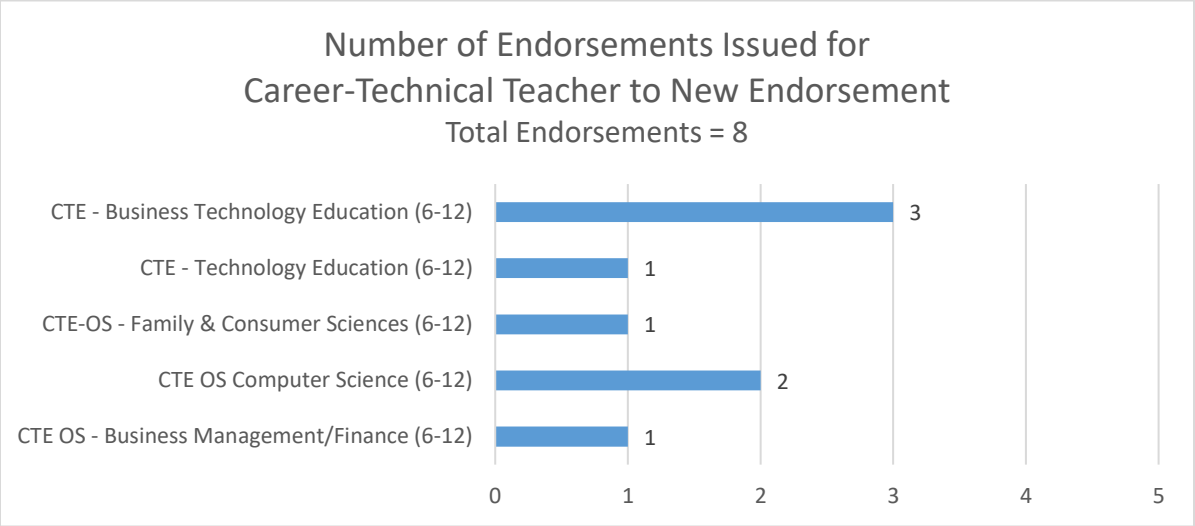
REQUESTS FOR TEACHER TO NEW ENDORSEMENT AUTHORIZATIONS

The purpose of this authorization is to allow an Idaho school district/charter to hire a candidate who holds a valid Idaho credential to serve in an assignment for which the candidate does not hold the appropriate endorsement. There were 330 Teacher to New Endorsement authorizations with 346 total endorsements issued during the 2021-2022 school year.



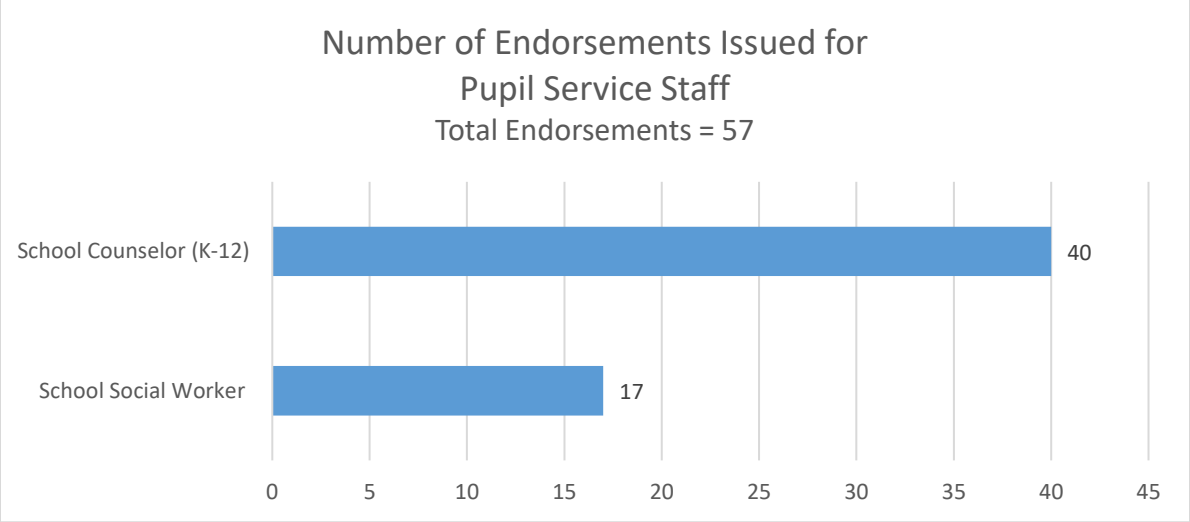

Number of Endorsements Issued for
Teacher to New Endorsement
Total Endorsements = 346
(Continued)
Music (K-12) 3
Natural Science (6-12) 31
Physical Education (PE) (6-12) 6
Physical Education (PE) (K-12) 8
Physical Science (5-9) 1
Physical Science (6-12) 4
Psychology (6-12) 1
Science - Middle Level (5-9) 3
Social Studies- Middle Level (5-9) 2
Social Studies (6-12) 14
Superintendent (Pre-K-12) 3
Teacher Librarian (K-12) 6
Theater Arts (6-12) 1
Visual Arts (6-12) 3
Visual Arts (K-12) 6
Visual Impairment (Pre-K-12) 1
World Language- American Sign Language (K-12) 2
World Language - Chinese (K-12) 1
World Language- French (6-12) 4
World Language- French (K-12) 1
World Language - German (6-12) 2
World Language - German (K-12) 1
World Language- Japanese (K-12) 1
World Language - Spanish (K-12) 6
0 5 10 15 20 25 30 35 40 45

There were 5 Career-Technical Teacher to New Endorsement authorizations with 8 total endorsements issued during the 2021-2022 school year.



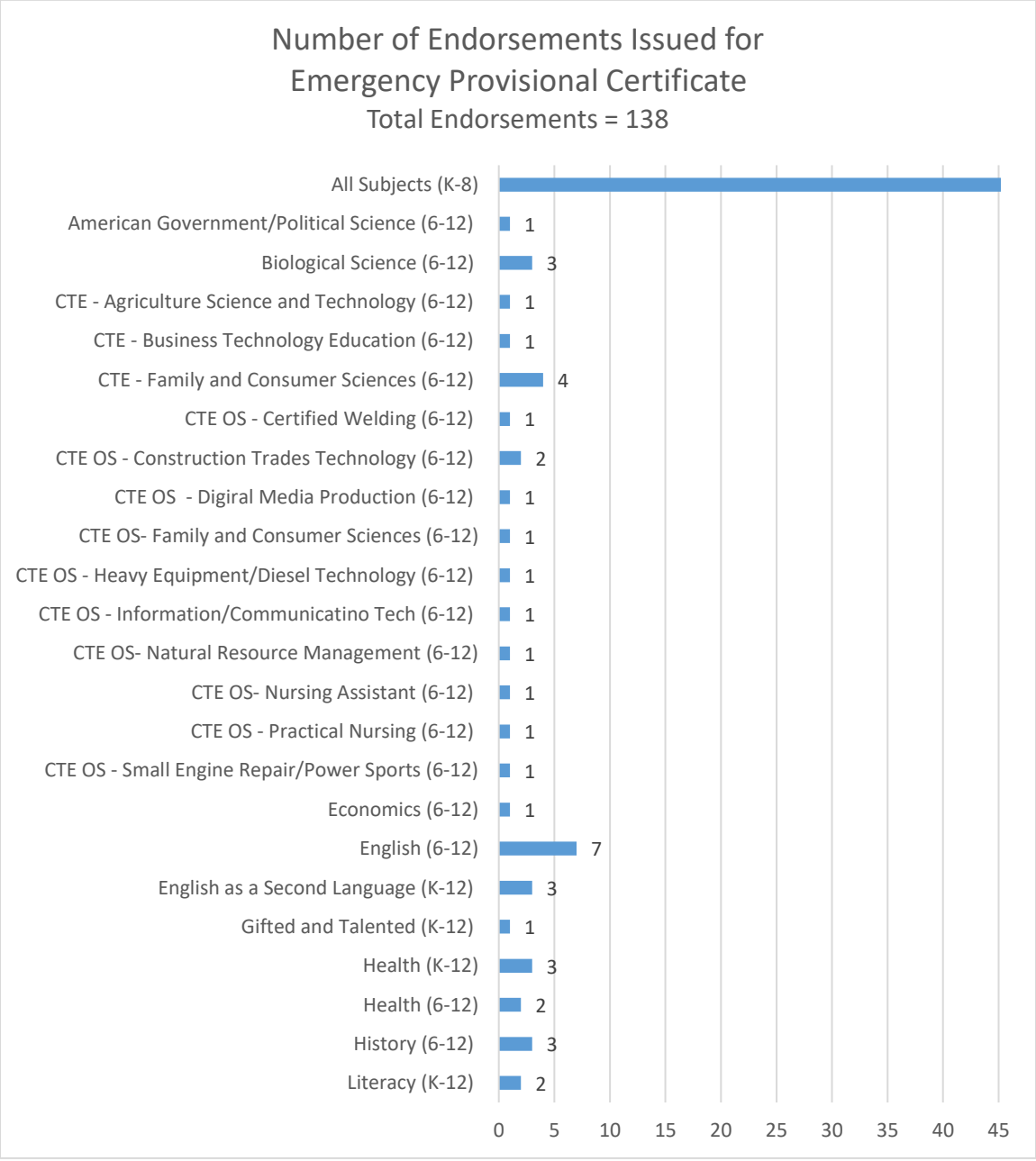
REQUESTS FOR PUPIL SERVICE STAFF AUTHORIZATIONS

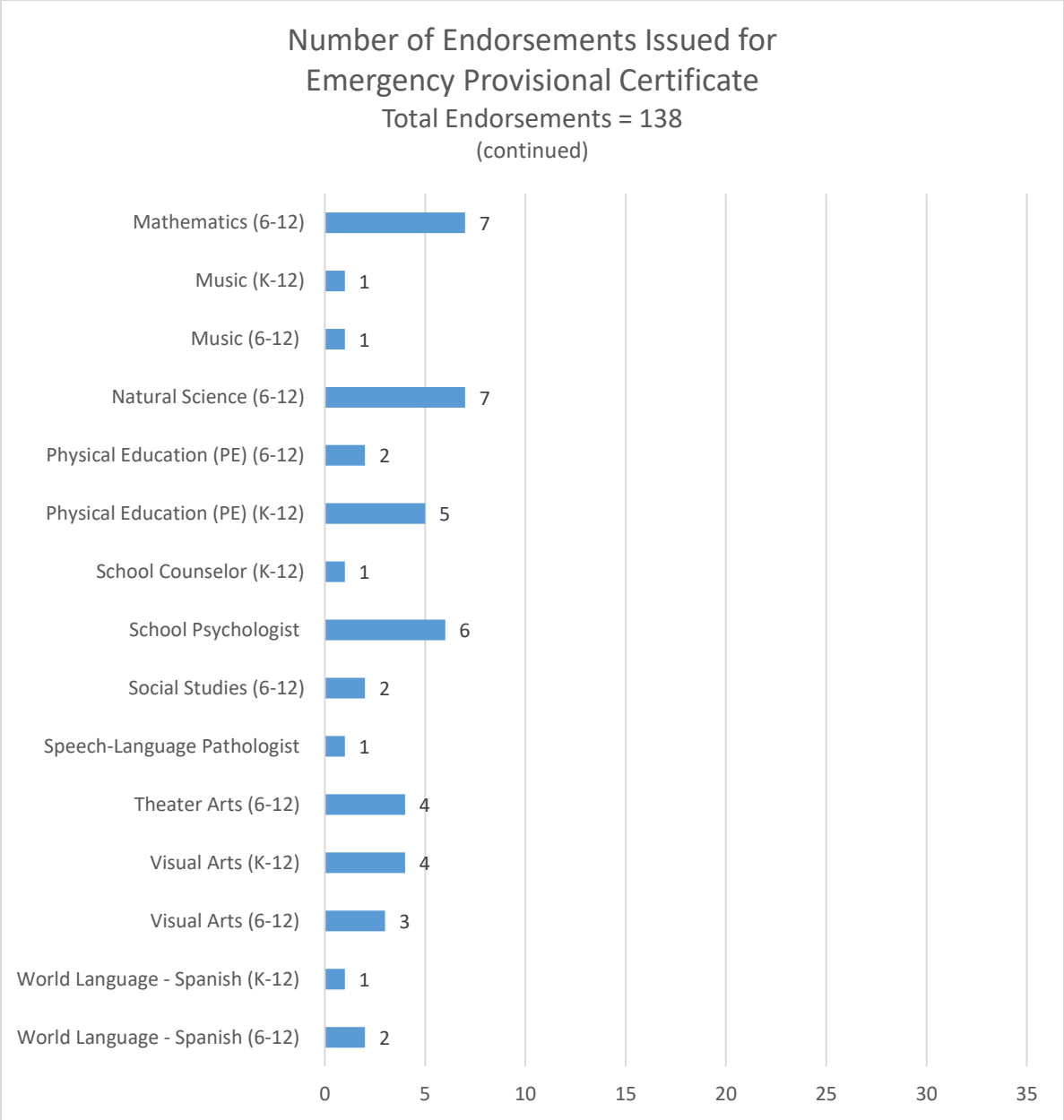
The purpose of this authorization is to allow an Idaho school district/charter to hire a candidate who does not hold a valid Idaho credential to serve in an assignment that requires the Pupil Service Staff Certificate. The authorization allows the candidate to serve in the assignment while working toward obtaining the Pupil Service Staff Certificate and the applicable endorsement. The Alternative Authorization- Pupil Service Staff can only be used for School Counselor or School Social-Worker. There were 57 Pupil Service Staff authorizations with 57 total endorsements issued during the 2021-2022 school year.



REQUESTS FOR EMERGENCY PROVISIONAL CERTIFICATE

The purpose of the Emergency Provisional Certificate is to allow an Idaho school district/charter to hire a candidate for one year who does not hold a valid Idaho credential to serve in an assignment that requires certification/endorsement in an emergency situation. The district must declare an emergency and the candidate must have at least two years of college training. As per IDEA, Emergency Provisional Certificates are not permitted for special education. There were 121 Emergency Provisional Certificates with 138 total endorsements issued during the 2021-2022 school year.




Number of Endorsements Issued for
Emergency Provisional Certificate
Total Endorsements = 138
(continued)
Mathematics (6-12) 7
Music (K-12) 1
Music (6-12) 1
Natural Science (6-12) 7
Physical Education (PE) (6-12) 2
Physical Education (PE) (K-12) 5
School Counselor (K-12) 1
School Psychologist 6
Social Studies (6-12) 2
Speech-Language Pathologist 1
Theater Arts (6-12) 4
Visual Arts (K-12) 4
Visual Arts (6-12) 3
World Language - Spanish (K-12) 1
World Language - Spanish (6-12) 2
0 5 10 15 20 25 30 35

EXECUTIVE COMMITTEE ACTIVITIES

Under Idaho Code §33-1208 and §33-1209, the PSC has the responsibility for suspending, revoking, issuing letters of reprimand, or placing reasonable conditions on any certificate for educator misconduct. The administrator of the PSC, in conjunction with the deputy attorney general and PSC staff, conducts a review of the written allegation using established guidelines to determine whether to open an investigation or remand the issue to the school district to resolve locally. The Executive Committee considers the allegation(s) and all additional relevant information to determine whether probable cause exists to warrant the filing of an administrative complaint. If probable cause is determined, the Executive Committee recommends disciplinary action to be taken against a certificate. Once an administrative complaint is filed, a hearing may be requested.

During 2021-2022, the PSC received sixty-seven (67) written complaints of alleged educator ethical misconduct, of which thirty-one (31) cases were opened. Additionally, seventeen (17) cases were closed during 2021-2022. Two (2) of the seventeen (17) closed cases involved educators who were employed as administrators. The data below represents the cases that were closed.

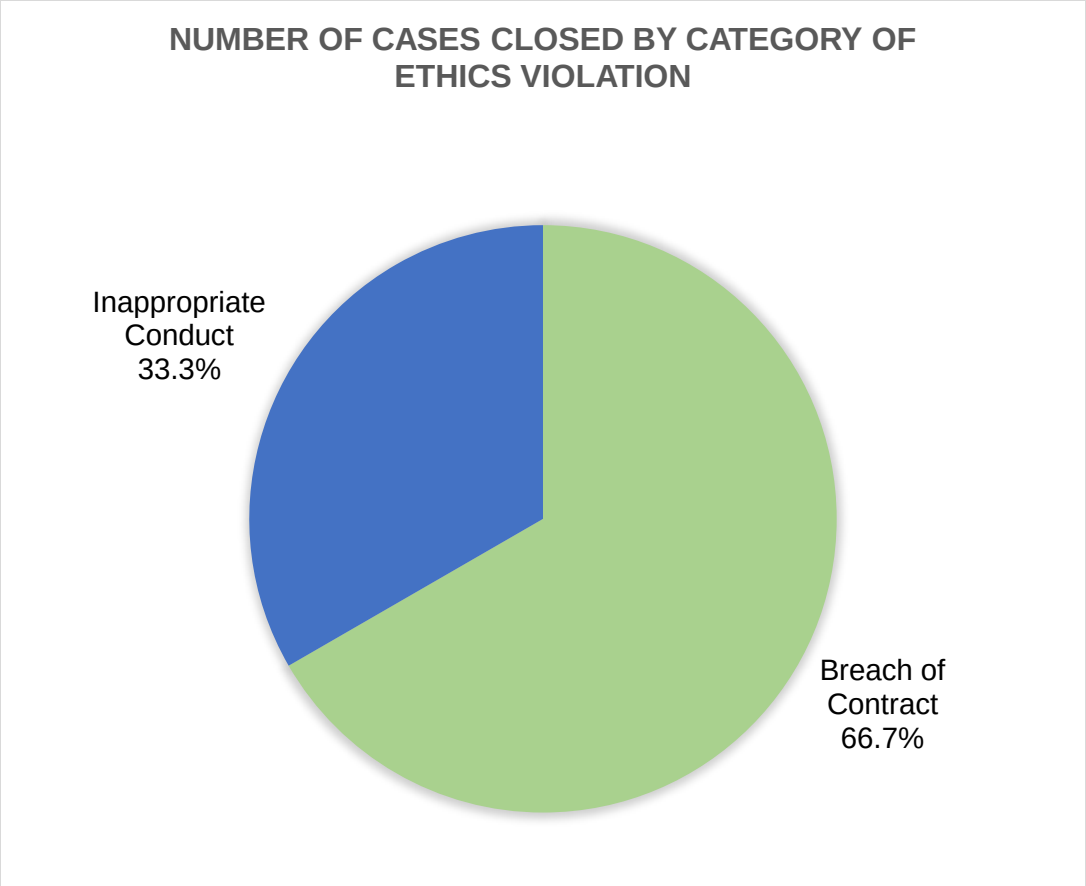
2021-2022 Closed Ethics Cases

Case Number	Category of Ethics Violation	Probable Cause Found	Disciplinary Action
22103	Inappropriate Conduct	Yes	Letter of Reprimand
22105	Breach of Contract	Yes	Suspension
22106	Inappropriate Conduct with Student	No	
22107	Inappropriate Conduct	Yes	Suspension
22108	Inappropriate Conduct	No	
22109	Inappropriate Conduct	Yes	Letter of Reprimand
22110	Breach of Contract	Yes	Letter of Reprimand
22111	Breach of Contract	Yes	Letter of Reprimand
22112	Inappropriate Conduct	No	
22113	Inappropriate Conduct with Student	No	
22114	Breach of Contract	Yes	Letter of Reprimand
22115	Breach of Contract	Yes	Suspension
22116	Breach of Contract	No	
22201	Breach of Contract	Yes	Letter of Reprimand
22202	Inappropriate Conduct with Student	No	
22209	Inappropriate Conduct with Student	No	
22210	Inappropriate Conduct	No	

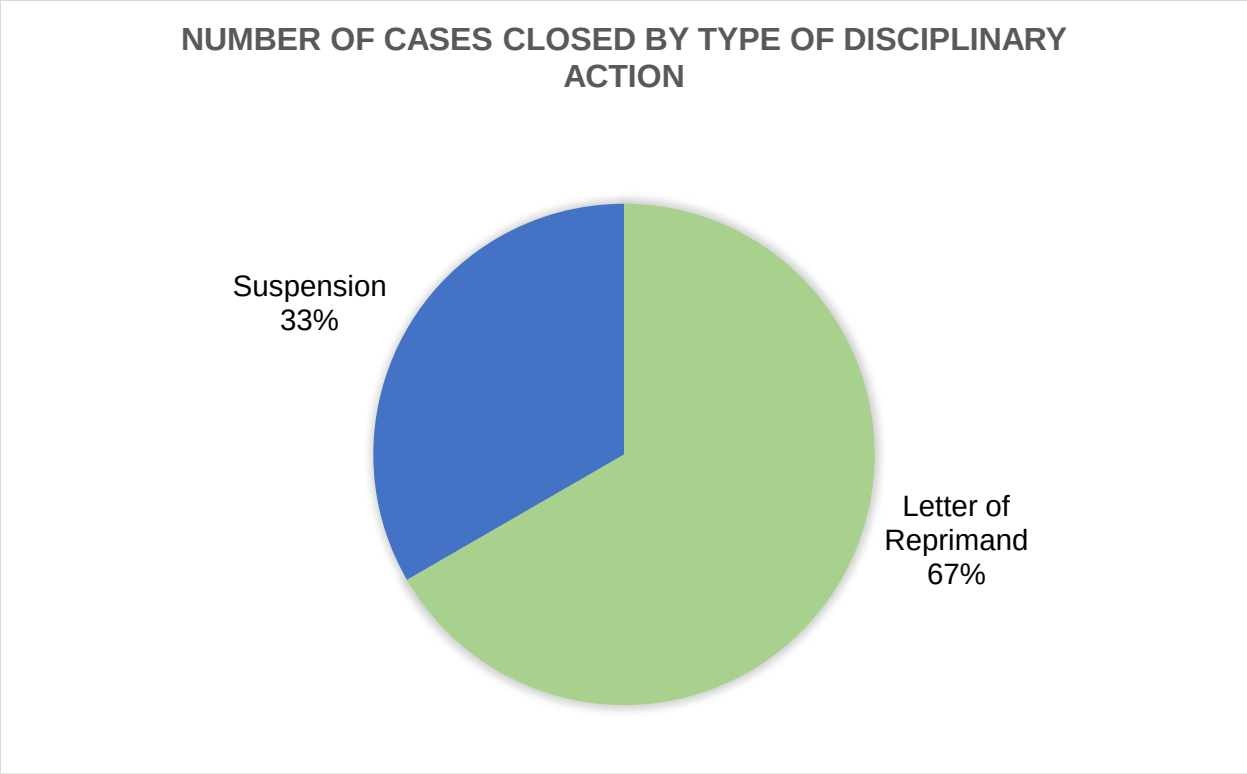
2021-2022 Aggregate Data of Closed Ethics Cases Where Probable Cause Was Found

During 2021-2022 the PSC closed seventeen (17) cases and finalized disciplinary action in nine (9) cases. The disaggregated data is shown below. The first table shows the data by the category of the ethics violation. The second table displays the data by the type of disciplinary action.

Category of Ethics Violation	Number of Cases Closed	Percent of Cases Closed
Application Discrepancy	-	0%
Breach of Contract	6	66.7%
Felony (Other)	-	0%
Felony (Violent)	-	0%
Inappropriate Conduct	3	33.3%
Inappropriate Conduct with Student	-	0%
Miscellaneous	-	0%
Misdemeanor	-	0%
Sexual Misconduct Not with a Student	-	0%
Sexual Misconduct with a Student	-	0%
Substance Abuse	-	0%
Theft-Fraud	-	0%



Type of Disciplinary Action	Number of Cases Closed	Percent of Cases Closed
Conditioned Certificate	-	0%
Letter of Reprimand	6	66.7%
Revocation	-	0%
Revocation (Permanent)	-	0%
Suspension	3	33.3%
Voluntary Surrender	-	0%



STANDARDS COMMITTEE ACTIVITIES

The Standards Committee is responsible for completing educator preparation standards reviews, educator preparation program reviews, and educator preparation new program proposal reviews for recommendation to the full PSC. The PSC reviews the recommendations of the Standards Committee and makes recommendations to the State Board of Education (Board) for approval consideration.

EDUCATOR PREPARATION STANDARDS REVIEWS

The purpose of educator preparation standards reviews is to define and establish rigorous and research-based standards that better align with national standards and best practices. The standards provide requirements for educator preparation programs to ensure that future educators acquire the knowledge and performance standards to best meet the needs of students.

In the Spring 2020, the House and Senate Education Committees directed the State Department of Education and the Office of the State Board to review the teacher preparation standards. At the request of the State Superintendent of Public Instruction, an Educator Standards Working Group, which included Standards Committee members and other members of the PSC, was convened to complete the full review and draft proposed revisions. One of the main tasks for this working group was to address the Idaho Standards for Initial Certification of Professional School Personnel (ISICPSP), a document incorporated by reference into rule, in an effort to reduce the regulatory burden for educator preparation programs while maintaining the rigor in standards for beginning educators.

Over an 18-month timeframe, the Educator Standards Working Group met several times to review the ISICPSP. The full review was completed April 2021. As a result, significant revisions were recommended to the PSC and, ultimately, to the Board of Education in August 2021.

In the Fall 2021, the State Board of Education did not render a decision on the revised teacher preparation standards. During the 2022 Legislative Session, House Bill 716 removed the prior ISICPSP from IDAPA 08.02.02.004 and placed the revised ISICPSP into Section 33-114(A), Idaho Code.

The revised Idaho Standards for Initial Certification of Professional School Personnel (July 1, 2022) can be found on the State Department of Education website. Educator Preparation Standards Reviews are currently on hold, pending the final disposition of the Idaho Standards for Initial Certification of Professional School Personnel.

EDUCATOR PREPARATION PROGRAM REVIEWS

Each educator preparation program will undergo a state program approval process that is designed to assure that graduates meet the Idaho standards for professional educators. The PSC follows the national accreditation council model by which institutions pursue continuing approval through a full program review every seven (7) years. Additionally, the PSC conducts State-Specific Requirement Reviews, not to exceed every third year following the full program review. The requirements are defined in IDAPA 08.02.02.100: Rules Governing Uniformity and the Council for the Accreditation of Educator Preparation (CAEP) standards.

The standards for evaluating teacher preparation programs are found in the *Idaho Standards for Initial Certification of Professional School Personnel* as updated and approved by the State Board of Education. For review purposes, pertinent rubrics accompanying these standards are on file in the office of the State Department of Education, Certification and Professional Standards. Current CAEP standards can be reviewed on the CAEP website.

The following educator preparation programs were reviewed by the PSC during the 2021-2022 school year:

- **Lewis-Clark State College**
  A virtual full unit State Team Review of Lewis-Clark State College's (LCSC) approved educator preparation programs was conducted December 12-14, 2021. The review was held concurrently with the review of LCSC's educator preparation programs by the Council for Accreditation of Educator Preparation (CAEP). The LCSC review included a pilot process for Design Review, used to assess programs with five (5) or fewer completers in the last seven (7) years for conditional approval.

  The State Review Team report was subsequently submitted to the PSC at its April 7-8, 2022 meeting. The report was considered, and the PSC recommended the Board accept the recommendations in the State Review Team report.

  The Board, at its June 2022 meeting, accepted the recommendations in the State Review Team Report and conditionally approved Preservice Technology Standards and the Chemistry program. Conditionally approved programs are subject to a focused revisit within three years following the on-site visit to determine if specific standards are met.

- **Northwest Nazarene University**
  An on-site full unit State Team Review of Northwest Nazarene University's (NNU) approved educator preparation programs was conducted March 14-16, 2022. The review was held concurrently with the review of NNU's educator preparation programs by CAEP. The NNU review included a pilot standard approval instrument, which was developed to provide EPPs the flexibility to demonstrate how their candidates met each overall standard.

  Upon completion of the review, all NNU programs and state specific requirements were recommended for continued approval. The report was subsequently submitted to the PSC at its June 16-17, 2022 meeting. The full PSC voted to recommend the Board approve the NNU State Team Report.

The Board, at its August 24, 2022 meeting, accepted the recommendations in the State Review Team Report.

Specific information regarding the Board's review of both of these report can be found on the State Board of Education website.

EDUCATOR PREPARATION NEW PROGRAM PROPOSAL REVIEWS

Each educator preparation new program proposal will undergo a desk review designed to confirm the new program meets the standards in the *Idaho Standards for Initial Certification of Professional School Personnel.* The PSC reviews the recommendations of the Standards Committee and makes recommendations to the State Board of Education for approval consideration.

The following educator preparation new program proposals were reviewed by the PSC during the 2021-2022 school year, for recommendation to the State Board of Education for conditional approval:

- **Idaho State University**
  - Computer Science (6-12)
  - Master in Social Work

APPENDIX – FISCAL YEAR 2022 BUDGET EXPENDITURES

Revenue	Estimated	Actual Revenue	Variance
Cert Application Fees	$600,000	$676,329.99	$79,329.99
Personnel	**Budget**	**Actual Expenditures**	**Variance**
Salaries & Benefits	$456,600	$486,520.63	($29,920.63)
Expenses (Spending Authority)	**Budget**	**Actual Expenditures**	**Variance**
Operating Expenses			
PSC Meeting/Travel/Meals	$30,000	$28,146	$1,854
PSC PD & Training	$-	$-	$-
Communication	$12,000	$15,105.07	($3,105.07)
Staff Development	$-	$-	$-
Repairs & Maintenance Services and Supplies	$50	$-	$50
Administrative Services	$7,400	$5,168.79	$2,231.21
Computer Services	$250	$-	$250
Staff Travel – NASDTEC Annual Conference	$5,500	$6,465.75	($965.75)
Staff Travel – NASDTEC PPI	$4,500	$-	$4,500
Staff Travel – Other	$500	$107.31	$392.69
Administrative/Office Supplies	$5,000	$4,241.43	$758.57
Computer Supplies	$250	$542.42	($292.42)
Insurance	$2,200	$1,566.43	$633.57
Rentals & Operating Leases	$12,100	$11,436.61	$663.39
Payroll/Accounting	$3,000	$2,622.56	$377.44
Committee Work Expenses			
Executive - Investigations/Hearings/Trainings	$4,000	$-	$4,000
Executive - Contract Investigative Services	$5,000	$-	$5,000
Executive - NASDTEC Dues	$4,500	$4,500	$-
Standards - Standard Reviews	$-	$-	$-
Standards - EPP Reviews and Focused Visits	$8,000	$4,667.79	$3,332.21
Standards - CAEP Partnership Dues	$5,250	$4,090	$1,160
Capital Expenses			
Computer Equipment	$-	$-	$-
Office Equipment	$-	$-	$-
Total Expenses (Spending Authority)	**$109,500**	**$88,660.16**	**$20,839.84**
All Expenditures (Personnel + Expenses)	**$566,100**	**$575,180.79**	
Revenue Less All Expenditures	**$33,900**	**$101,149.20**	