

**Idaho State Board of Education**  
**GOVERNING POLICIES AND PROCEDURES**  
**SECTION: I. GENERAL GOVERNING POLICIES AND PROCEDURES**  
**SUBSECTION: M. Annual Planning and Reporting**

**June 2024**

This subsection shall apply to Boise State University, Idaho State University, Lewis-Clark State College, University of Idaho, College of Eastern Idaho, College of Southern Idaho, College of Western Idaho, North Idaho College, and the agencies, under the Board's governance and oversight.

1. Board Approval
  - a. The Board will approve annually a K-20 strategic plan and strategic plans for each agency and institution.
  - b. The Board will approve annually a K-20 performance report and performance reports for each agency and institution.
2. Strategic Plan Requirements
  - a. All strategic plans shall be compliant with Idaho Code § 67-1903 and the Strategic Planning and Performance Report Guide maintained by the Division of Financial Management (DFM).
  - b. All strategic plans shall be aligned to the Board approved K-20 strategic plan.
  - c. Mission statements used in strategic planning must be approved by the Board, pursuant to Board Policy III.I or by the community college's board of trustees.
    - i. Mission statements may be approved in conjunction with the strategic planning process or brought to the Board as a separate agenda item.
  - d. Institutional strategic plans shall be compliant with applicable accreditation requirements.
  - e. All strategic plans shall include at least one programmatic goal and one operational goal.
3. Performance Report Requirements
  - a. All performance reports shall be compliant with Idaho Code § 67-1904 and the Strategic Planning and Performance Report Guide maintained by DFM.
  - b. Board staff will make available a performance report template for consistent reporting across all agencies and institutions.
4. Training
  - a. Key personnel from Board staff and each agency and institution shall be required to participate in training offered by the DFM pursuant to Idaho Code § 67-1905.
5. Timeline
  - a. All agencies and institutions shall submit complete drafts of their strategic plans to designated Board staff no later than the meeting materials due date for the Board's regularly scheduled April meeting each year.

- b. All agencies and institutions shall submit complete final drafts of their strategic plans to designated board staff no later than the meeting materials due date for the Board's regularly scheduled June meeting each year.
  - c. All agencies and institutions shall submit final drafts of performance reports to the designated board staff no later than the meeting materials due date for the Board's regularly scheduled October meeting each year.
  - d. Community colleges must seek approval from their boards of trustees prior to submitting final drafts of strategic plans and performance reports to the Board.
  - e. Board approved strategic plans and performance reports shall be submitted by Board staff to DFM, on behalf of the agencies and institutions.
6. Annual Reports
- a. Agencies and institutions shall provide annual progress reports to the Board in accordance with a reporting schedule established by the Board's executive director.
  - b. Annual reports shall include, but need not be limited to, an update on the agency or institution's progress toward meeting objectives established in the strategic plan.
7. Performance Measures
- a. The Board may develop a set of uniform system-wide performance measures for agencies or institutions.
    - i. The Board may require agencies and institutions to include such measures in the agency or institution's strategic plan and performance report.
    - ii. Board staff will determine the business rules applicable to such measures.
    - iii. Board staff will provide a reporting schedule for such measures.
  - b. Agencies and institutions may include additional performance measures in their strategic plan. However, Idaho Code § 67-1904 establishes that no more than ten (10) performance measures may be included in the performance report.
8. Additional Reports
- Agencies and institutions will provide any data or report requested by the Board, in accordance with a schedule and format established by the Executive Director.

The census dates for reporting postsecondary data shall be October 15<sup>th</sup> and March 15<sup>th</sup> of each year.