PACTEC
Portland Area Career Technical Education Consortium

Region 2A

Consortium Manual

2023-2024

Perkins V

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Portland Community College Nondiscrimination Statement

The College prohibits unlawful discrimination based on race, color, religion, national origin, sex, marital status, disability, veteran status, age, sexual orientation, or any other status protected by federal, state, or local law in any area, activity or operation of the College. The College also prohibits retaliation against an individual for engaging in activity protected under this policy, and interfering with rights or privileges granted under anti-discrimination laws.

In addition, the College complies with applicable provisions of the Civil Rights Act of 1964 (as amended), related Executive Orders 11246 and 11375, Title IX of the Education Amendments Act of 1972, Section 504 of the Rehabilitation Act of 1973, Americans with Disabilities Act of 1990 (as amended), Uniformed Services Employment and Reemployment Rights Act ("USERRA"), and all local and state civil rights laws. Under this policy, equal opportunity for employment, admission, and participation in the College's programs, services, and activities will be extended to all persons, and the College will promote equal opportunity and treatment through application of this policy and other College efforts designed for that purpose.

Section I: Overview

Welcome

We look forward to working together and supporting the academic and technical skill success of our Career and Technical Education Programs of Study as we move forward in the 2023-24 academic year. PACTEC is now composed of 60 approved Perkins Programs of Study in Washington and Columbia County, along with 79 programs in our Beaverton and Hillsboro District Alliance Partners - and growing.

As we move through the latter part of Perkins V and the post-pandemic era, we will continue to enhance and enrich our Programs of Study, providing high quality support and training for our teachers and administrators, improving our graduation and competencies rates, and creating strong industry partnerships. We will continue supporting consortium programs through the staggered program renewal process (every four years) and in development of new programs in new areas.

Our modestly expanded CTE staff includes new emphasis on industry partnerships, advisory committees and supporting career connected learning in CTE and beyond. PACTEC's Work-Based Learning Coordinator, the PCC Career Connected Learning System Navigator (ODE-sponsored), and a new director of accelerated credit division provide a stronger base to continue to enrich all of our Programs of Study. Expanded outreach facilitates better communication and expands the opportunities given to industrial partners the opportunity to share resources with teachers and school districts in order to provide quality career education and access to all students.

For a complete and comprehensive view of CTE Programs of Study and Perkins V in the state of Oregon follow the link below and open the Oregon CTE Policy Guidebook to download the Word document.

https://www.oregon.gov/ode/learning-options/CTE/Pages/Career-and-Technical-Education-(CTE)---Educator-Resources.aspx

Section II: Consortium Information

Members

The district members of the Region 2A Consortium are:

Banks School District	Gaston School District
Forest Grove School District	Scappoose School District
Sherwood School District	St. Helens School District
Tigard-Tualatin School District	Vernonia School District

Portland Community College*

*represented by the Regional Coordinator (Fiscal agent for the Consortium and non-voting Member)

The Dual Credit and PACTEC staff also serve Region 2A Alliance partners (Beaverton School District and Hillsboro School District), and Portland Public School District on region-wide efforts..

Purpose

The Region 2A Consortium works together to provide support for high schools in the implementation and improvement of quality Career and Technical Education programs that provide training and education for high-skill, high-demand, high-wage careers. The Consortium applies for Carl Perkins funding under "The Carl D. Perkins Career and Technical Education Act of 2006". This agreement is a confirmation of the Members' willingness to continue the Carl D. Perkins funding using the Consortium Agreement.

Roles and Responsibilities

Consortium Manager/Region 2A Regional Coordinator:

- Hold a minimum of three (3) Consortium meetings annually, ideally quarterly, including leading meetings, creating agendas based on member needs and Perkins requirements, and notifying Members of meeting times and locations.
- Develop and implement a consortium plan addressing regional needs of members with appropriate budget.
- Ensure timely and accurate reporting for the Consortium.

PACTEC

- Maintain a signed copy of the annually updated Consortium Agreement with copies to each Member.

Fiscal Agent:

- Provide financial oversight and maintain accounting and billing records related to grant funded programs.

- Disburse grant funds in compliance with state, federal, and institutional requirements.

- Ensure that appropriate accounting practices and fiscal controls are used, and that expenses are allocated in accordance with grant requirements.

- Conduct internal reviews of grant-funded programs to ensure appropriate administration and fiscal management.

Administrators:

- Serve as the CTE Representative or appoint somebody else in your building to perform that function.

- Oversee the professional development of the CTE instructors in your building and ensure that they are meeting requirements of their Professional Development Plan before expending funds on the approved Programs of Study.

- Work with your appointed CTE Representative (if you have designated this duty) to approve Perkins Requests for Submission to the fiscal agent. Ensure that funds are being allocated based on Perkins Approved Programs of Study plans.

- Comply with the Federal, state and local assurances described in this Agreement. Certificate of Assurances must be signed before 2023-2024 Perkins funds can be spent.

Note: Building Administrators will also receive meeting notices and are invited, but not expected to attend if they have appointed a CTE Representative in their place.

CTE Representatives:

- Serve as the primary point of contact for your school for the Region 2A Consortium.

- Attend all Consortium Meetings. Communicate information received to administrative and CTE staff in a timely manner.

- Provide guidance to CTE teachers in your schools that will help them understand what is developing within our region and around the state in newest technology, professional development programs, integration of academic and other innovations.

- Coordinate and administer the appropriate expenditure of Carl Perkins funds and the tracking of equipment purchased with such funds, including:

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- - Maintain Carl Perkins equipment inventory.
    - Review Requests for Purchase Orders and Professional Development to ensure they comply with Perkins 135 and obtain Administration signature.
    - Maintain Perkins budget.
  - Complete and submit required reports in a timely and accurate manner, including:
    - Complete CTE Program Update.
    - Collect and submit year-end CTE data or assist designated staff person at your school.
    - Submit final report materials such as activity and improvement plan outcomes.
  - Promote CTE regional activities to students and teachers in your schools, including dual credit, professional development and student events.
  - Participate in evaluation and continuous improvement activities to improve Perkins approved Programs of Study.

CTE Instructors:

- Familiarize yourself with this consortium agreement and any changes in Perkins V. Refer to the appropriate uses of Perkins funds in this handbook when requesting purchases or professional development funding.

- Participate in the professional development according to your professional development plan and your Perkins approved Program of Study.

- Work with your CTE colleagues to evolve your existing approved program into Perkins V defined 9th-14th grade Programs of Study.

- Self-evaluate your program for the purpose of continuous improvement, which you will be responsible for completing as part of an on-going renewal cycle. Pay attention to new licensure requirements and renew in a timely manner.

- Seek guidance when interpreting Perkins requirements, as certain policies can be confusing. Your CTE Representative and the Region 2A Regional Coordinator and staff are available to assist.

- Pursue opportunities for your students that will help them achieve their next steps: Dual Credit, Student Leadership Organizations, Career-Related Learning, and the offering of Credit for Proficiency or Applied Academics in your program's coursework.

> *"All partners in a Program of Study (POS) are equally responsible for the design and on-going maintenance of the POS. It is suggested that partners in a region form an alliance with rules of operation (i.e., By-laws) that identify member responsibilities, rules for membership and procedures and protocols for decision-making and effecting changes." (ODE)*

A copy of the Consortium Agreement is located at the end of this section.

PACTEC

PACTEC Support Team

The Region 2A Consortium provides 4 staff personnel to support the regional secondary schools with Perkins CTE Programs of Study.

Support team members:

Mary Dakin	Regional CTE Coordinator/Program Mgr.	Mary.Dakin@pcc.edu	971-722-7774
Katrina Stein	Work-Based Learning & Advisory Board Program Coordinator	Katrina.Stein@pcc.edu	971-722-7738
Karin Wriggle	PACTEC Program Specialist	Karin.Wriggle1@pcc.edu	971-722-7773
Rebecca Hufford	Perkins Specialist	Rebecca.hufford@pcc.edu	971-722-7734

Our Mission – "Promote high quality Career & Technical Education programs withy career related learning for all students through a coordinated deliver of services in Secondary and Post-Secondary education."

We serve the Consortium by:

- Collaborating with district representatives who make up the Consortium to support the regional CTE instructors and develop the annual plans for investing the Perkins funds;

- Guiding Programs of Study development and implementation by content area and supporting grades 9 to 14 transitioning to careers;

- Recommending eligible programs of study applications to ODE for approval;

- Providing regional professional development and implementing the annual plan of work;

- Assisting schools with program updates and data collection;

- Coordinating the dual credit program and assisting with postsecondary transitions;

- Representing the region at state meetings;

- Facilitating CTE licensure and renewal;

- Applying and reporting annually for the Perkins Grants;

- Managing funds, purchasing equipment and maintaining inventories for the regional high schools.

Regional Calendar

Date	Activity
June 30, 2023	2022-2023 Local Needs Assessments completed/submitted 2022-2023 Perkins V Assurances submitted (fiscal agent)
July 1, 2023	2023-2024 Perkins grant funds available - 20% of preliminary award amount Implementation of 2020-2024 Perkins Plan
September 18, 2023	2023-2024 CTE Program update (Fall) opens
September 20, 2023	2023-2024(or 4-year) Perkins Basic Grant Application 2023-2024 Perkins Basic Grant Budget due 2023-2024 Perkins Reserve Grant and Budget due 2023-2024 Consortia Agreement and Consortia Handbooks submitte
September 30, 2023	2023-2024 Perkins Basic and Reserve Grants approved 2022-2023 Perkins Basic and Reserve Grant funds must be encumbered
October 1, 2023	2023-2024 Perkins official grant award notifications available in EGMS for full allocation
October 23, 2023	2023-2024 CTE Program Update (Fall) due for schools – ALL secondary programs must be updated in the fall
November 15, 2023	2022-2023 Final Basic and Reserve final claims made in EGMS 2022-2023 Perkins Annual Report Due 2022-2023Perkins 90% Report validation begins
November 27, 2023	2023-2024 CTE Program update due for Regional Coordinators
November 30, 2023	20122-2023 Perkins 90% Report validation closes
December 28, 2023	2023-2024 CTE Program Update completed by ODE Education Specialists
December 31, 2023	2022-2023 Consolidated Annual Report due from ODE to OCTAE
February 1, 2024	2023-2024 Consortium documentation due, including any fiscal agent requests
February 18, 2024	2023-2024 Perkins Basic Grant informational web
March 2024	Local and Regional CTE Needs Assessment updated, if necessary
April 12, 2024	2024-2025 Perkins Basic and Reserve preliminary allocations available (tentative)
April 30, 2024	2024-2025 CTE Program of Study applications – early submission
May 14, 2024	2024-2025 Student Data Collections Open

May 31, 2024	2024-2025 All CTE Program of Study Applications due
June 29, 2024	2024-2025 Student Data Collections Close
June 30, 2024	2024-2025 Perkins Basic progress on goals and budget submitted 2024-2025 Reserve Grant applications progress on goals and budget submitted 2024-2025 Perkins Assurances

Section III – Perkins V Guidelines

State Recognized Programs

In Oregon, the CTE Program of Study is the cornerstone of Career and Technical Education programming. In the Perkins V Act, the term "program of study" means a coordinated, non-duplicative sequence of academic and technical content at the secondary **and** postsecondary level that

- incorporates challenging state academic standards;
- addresses both academic and technical knowledge and skills, including employability skills;
- is aligned with the needs of industries in the economy of the state, region, or local area;
- progresses in specificity from a broad overview at the Career Cluster level, to occupation-specific instruction at the Focus Area level;
- has multiple entry and exit points; and
- culminates in the attainment of a recognized postsecondary credential and/or degree.

State approved Programs of Study are eligible to use federal Carl D. Perkins and state funds to help improve student performance.

The CTE program application described in this guidance is a small part of the more extensive program design process intended to help Oregon high schools and community colleges support and prepare students with industry-based technical and academic knowledge and skills needed for success in secondary and postsecondary education, and high-wage/in-demand careers. Applications are accepted on a rolling basis and will be reviewed by ODE within two to six weeks.

CTE PROGRAM OF STUDY DESIGN

In Oregon, the CTE Program of Study is the cornerstone of CTE programming. In the Perkins V Act, the term "program of study" means a coordinated, non-duplicative sequence of academic and technical content at the secondary **and** postsecondary level that
- incorporates challenging state academic standards;
- addresses both academic and technical knowledge and skills, including employability skills;
- is aligned with the needs of industries in the economy of the state, region, or local area;
- progresses in specificity from a broad overview at the Career Cluster level, to occupation-specific instruction at the Focus Area level;
- has multiple entry and exit points; and
- culminates in the attainment of a recognized postsecondary credential and/or degree.

Oregon achieves the federal definition of High Quality Program of Study by requiring six core elements in all approved programs of study. The elements of a High Quality Program of Study include:
- Standards and Content
- Alignment and Articulation
- Accountability and Evaluation
- Student Support Services
- Professional Development
- Access and Equity

All CTE POS must address the six Elements of CTE Programs of Study as listed above. During the design process, partners of a CTE POS must determine whether the design will follow the template

for a CTE Statewide Program of Study–including one or more of the indicated Focus Areas specified in each Career Cluster–or be a locally developed program of study. By June 2024, all CTE Programs of Study in Oregon must include at least three CTE high school credits.

CTE PROGRAM APPLICATION

ALL CTE POS undergo essentially the same process for development and implementation:

- Partners identify labor market needs based on advisory group recommendations and the local needs assessments.
- Partners determine whether or not adopting the Statewide Framework works for their community.
- Working with the teacher, the partners help outline how the program will meet the six required POS elements.
- Once it is determined that a program is ready to apply, the Regional Coordinator (RC) initiates the application in the ODE Information System database.
- Teachers/instructors and Regional Coordinators work together to complete and submit the program application to ODE.
- ODE approves the program application for up to four years, based on the statewide renewal schedule.
- Teachers/instructors–with the help and guidance of industry partners and advisors, Regional Coordinators and CTE Deans, other administrators, parents, students, and colleagues–implement the CTE POS with fidelity.

STATEWIDE PROGRAM OF STUDY	LOCALLY DEVELOPED PROGRAM OF STUDY
- INDUSTRY ENGAGEMENT ACROSS THE STATE - STATEWIDE PLC - STATEWIDE ADVISORY COMMITTEE FORMED IN SUPPORT OF LOCAL/REGIONAL PARTNERSHIPS (TBD) - PROGRAM OF STUDY FRAMEWORKS - WBL RESOURCES SHARED STATEWIDE (TBD) - STUDENT LEADERSHIP OPPORTUNITIES DEVELOPED COLLABORATIVELY STATEWIDE (TBD) - INDUSTRY RECOGNIZED CREDENTIALS IDENTIFIED AND AGREED UPON STATEWIDE (TBD)	- LOCAL INDUSTRY ENGAGEMENT - REGIONAL PLC - LOCAL PARTNERSHIPS/ADVISORIES - BEYOND EMPLOYABILITY SKILLS AND THE CAREER AREA CLUSTER, PROGRAM CONTENT DEVELOPED THAT ALIGNS WITH LOCAL NEEDS - LOCAL WBL RESOURCES CREATED - STUDENT LEADERSHIP OPPORTUNITIES DEVELOPED LOCALLY - INDUSTRY RECOGNIZED CREDENTIALS IDENTIFIED AND INCORPORATED

For more information on the program design and development process, please refer to the CTE Policy Guidebook, pages 32-40.

PROGRAM RENEWALS

After four years, each program of study is assessed through the renewal process; based on that evaluation, teachers, instructors, and industry partners reevaluate the program of study and make appropriate adjustments. Regional Coordinators in each region lead this local evaluation for programs and submit their recommendations to ODE for another four-year renewal of those programs of study that are of sufficient size, scope, and quality.

The CTE Program of Study Quality Rubric is a tool to help educators and administrators evaluate their CTE Programs of Study during program renewal and to create goals for program improvement. The rubric is focused on the six required elements of a High Quality Program of Study (HQPOS), and performance levels are aligned with the Oregon Equity Stance; Program Size, Scope, and Quality requirements; and the Work-Based Learning Rubric.

Regardless of a program's expiration date at initial approval, all Statewide and Locally Developed CTE Programs of Study will renew on schedule with the statewide renewal cycle for its associated Career Cluster.

CAREER CLUSTERS	RENEWAL DEADLINE
AUTOMOTIVE & HEAVY EQUIPMENT EDUCATION & TRAINING LAW, PUBLIC SAFETY & SECURITY NATURAL RESOURCE SYSTEMS	JUNE 2023
HOSPITALITY, TOURISM & CULINARY ARTS, A/V & COMMUNICATIONS MARKETING ENGINEERING TECHNOLOGY	JUNE 2024
HUMAN SERVICES GOVERNMENT & PUBLIC ADMINISTRATION FINANCE HEALTH & BIOMEDICAL SCIENCES AGRICULTURE & FOOD SYSTEMS	JUNE 2025
ARCHITECTURE & CONSTRUCTION BUSINESS MANAGEMENT & ADMINISTRATION INFORMATION & COMMUNICATIONS MANUFACTURING	JUNE 2026

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STATEWIDE PROGRAM OF STUDY MODELS

In 2021, ODE embarked on creating standardized CTE Programs of Study beyond the existing Agriculture Science & Technology (2011) and Natural Resource/Forestry (2016) program areas. The 2021 efforts are based on statewide labor market information for high-wage, in-demand occupations. They are intended to ensure equitable CTE program quality across the state, more substantial support for CTE educators, collegial engagement between high school teachers and community college partners, more consistent connections to college credit, simplified advising and recruitment, and better alignment with postsecondary programs.

The new Statewide CTE Program of Study Frameworks provide updated Knowledge and Skill Sets to inform CTE program development in each Career Cluster. The updated Knowledge and Skill Sets include 1) employability knowledge and skills, 2) Career Cluster knowledge and skills, and 3) Focus Area knowledge and skills. Within each Career Cluster, CTE Programs of Study may be offered at the Cluster or Focus Area level. Cluster-level programs of study offer students in high schools a broad overview of careers in the field, along with skills valued by all industry partners. Focus Area programs of study offer students more occupationally specific training that may lead to industry recognized certificates and degrees.

With the adoption of Statewide Programs of Study, currently approved programs may decide to change their program focus area for better alignment with the updated focus area options and revised knowledge and skill sets. Focus area changes should be made only during the first cycle of renewals.

Changing a focus area affects the associated CIP code and can lead to a loss of accumulated CTE student data. As programs choose to join a Statewide Program of Study, ODE will recognize a CIP code change and ensure continuity of the CTE Program data. Approved programs that change focus areas at the time of renewal will maintain historical information for data tracking purposes; however, if approved programs change focus areas outside of the initial renewal and/or after the Statewide Program of Study adoption, they will be considered new programs and data accumulation will start over.

If one of your programs has decided to change its focus area at the time of renewal, please report the change using the CTE Focus Area Change form to ensure the change is captured correctly moving forward.

Perkins Grants

Overview

In Region 2A there are three grant funding sources, the Perkins Basic Grant, the Perkins Reserve Grant and the Partnership Fund. The Perkins Basic and Reserve Grants are funded through the state's allotment of the Federal Perkins funding. The Partnership Fund is funded through contributions from the Region's consortium's member school districts.

Each spring, the eligible recipients (i.e. Consortium and Affiliate members of a Region) begin a continuous improvement planning process for updating their 5-Year Perkins Local Plan. The purpose of the Local Plan Update, otherwise known as the Basic Grant, is to design activities that will advance the implementation of CTE Programs of Study and improve student performance on secondary and postsecondary Perkins Performance Measures during the upcoming program year. Additionally, the plan is designed to provide a convenient format for the Annual Report and fulfill a legal requirement (Carl D. Perkins Career and Technical Education Improvement Act of 2006, Section 134). Each year ODE also has the option to set aside funds for targeted or specialized projects. This title, known as the Reserve Grant, provides consortia-level funding to support overall POS implementation, address common weaknesses, and/or incentivize successful practices.

Perkins Basic Grant

The Perkins Basic Grant's focus is on CTE Program of Study development and enhancements and the creation and implementation of work-based learning experiences and/or technical skills assessments (TSAs) (optional) as a vital evaluation and improvement tool. The Perkins local application includes a program improvement action plan designed to provide specific targeted strategies to improve CTE student success. The improvement plans are required for any recipient that failed to meet 90% of the performance target and are optional for those meeting all targets. All local plans are tied directly to Perkins core performance indicators and the goals set in the Oregon Perkins Plan. There is an ongoing need for professional development, particularly for instructional design that integrates academic and technical content in CTE as the Common Core State Standards are implemented. All Oregon eligible recipients are required to make a minimum 10% financial investment in professional development. Oregon CTE staff, along with Regional personnel, including the as part of the continuous improvement processes.

 The Basic grant will be focused on specific indicators selected by PACTEC. Any expenditure must align to these indicators:

- **Standards and Content** – CTE Programs of Study align with Oregon Skill Sets or other mini grant industry-based Standards
- **Alignment and Articulation –** CTE is linked at the secondary and postsecondary levels
- **Accountability and Assessment –** CTE concentrators who complete the secondary or postsecondary component of their Program of Study demonstrate through real-world learning experiences that contain industry-based standards and assessing the goals of each

program of study

- **Student Support Services -** CTE Programs of Study provide ALL students with access to educational opportunities for careers that are nontraditional for a student's gender
- **Student Support Services –** Preparation for non-traditional fields is promoted for ALL students
- **Professional Development –** Professional development programs that are consistent with section 122 are provided to secondary teachers, faculty, administrators, and career guidance and academic counselors who are involved in integrated career and technical education programs, including in-service and pre-service training on effective integration and use of challenging academic and career and technical education provided jointly with academic teachers to the extent practicable and programs that are provided to train teachers specifically in the effective use and application of technology to improve instruction

Funds from this grant are used for the regional priorities (including professional development and mini grant projects, which will be explained in the fiscal section of the manual).

· Perkins Reserve Grant

· In the Perkins Reserve Grant model used in the State of Oregon, 10% of state Perkins funds are distributed for regional priorities in 16 consortia throughout the state. PACTEC manages the Reserve Grant for Washington and a portion of Columbia and Multnomah counties. The focus of the Perkins Reserve Grant is professional development and program support services.

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· Partnership Fund

· PACTEC's Partnership Fund is funded by the consortium and partner high schools and a portion of the state's Career Pathways Fund. The collected funds are utilized for the Regional Coordinator and PACTEC support staff, expenses associated with local regional and national meetings/workshops, CTE student recognition, professional development activities, and miscellaneous items, such as postage and supplies. These funds are collected from the school districts yearly, based on the support that is provided. The monies from the state's Career Pathways Fund is for processing and supporting the high school Pathways grants.

Funding

Perkins funding follows a 15-month grant period from July 1 - September 30. Each Spring federal, state and local entities gear up to distribute Perkins funds for planned activities that improve programs. As each fiscal year grant cycle comes to a close the state collects annual reports from local eligible recipients. These reports serve as the official record of accountability for the appropriate use of Perkins funds and provide the basis for Oregon's Consolidated Annual Report (CAR) to the federal Office of Vocational and Adult Education (OVAE). Consistent inability to address weak performance may interrupt the flow of funds to local programs.
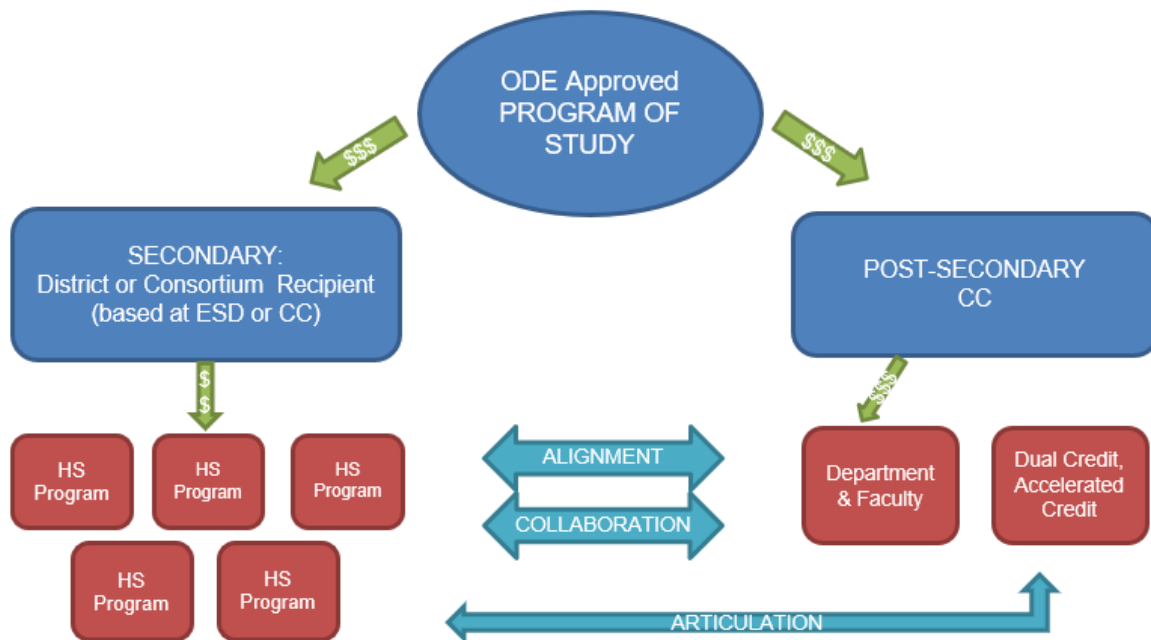
The Carl D. Perkins Career and Technical Education Act of 2006, amended by the Strengthening Career and Technical Education for the 21st Century Act (Perkins V) OREGON DISTRIBUTION, July 1, 2023 - September 30, 2024

2023-2024 Oregon Allocation $17,308,723

Local Programs $14,712,415

State Programs $2,596,308

Basic Grant $13,307,865

Reserve Grant $2,206,862

State Administrations $865,436

State Leadership: $1,730,872

Secondary $6,653,933

Postsecondary $6,653,933

OREGON DEPARTMENT OF EDUCATION
Oregon achieves . . . together!
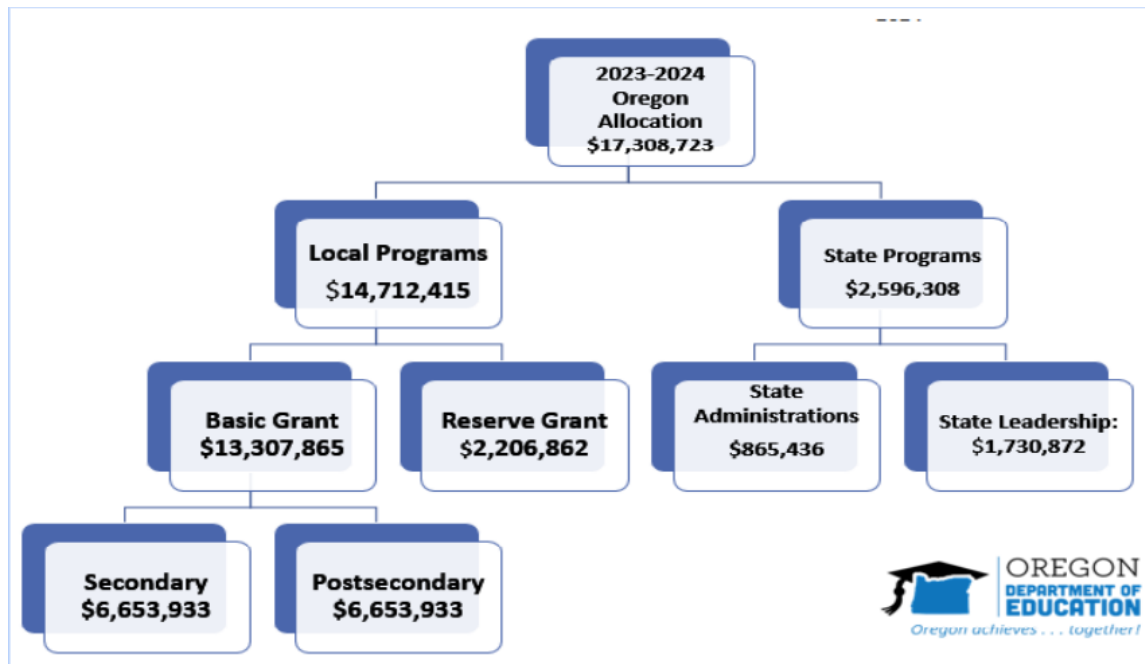
Teacher Licensure

To teach in an Oregon state approved CTE program, the instructor must have an appropriate CTE license and/or endorsement, specific to the program career area. The Oregon Administrative Rules (OARs) governing CTE teacher licensure were revised and adopted by the Oregon Teacher Standards and Practices Commission (TSPC) in 2010. Chapter 584 of the OARs includes those rules specific to TSPC. Division 42 is the section of OARs under TSPC regulation that outlines CTE Licenses and Endorsements.

CTE teachers play a critical role in supporting students in grades 6 through 12 as they explore and develop their career interests while building essential skills that will enhance their future career and education success.

Oregon CTE Licensure Pathways

The CTE licensure application is a **two-part** process in Oregon. Applicants for CTE licenses apply both with the **Oregon Department of Education (ODE)** and the **Teacher Standards and Practices Commission (TSPC).** In addition to completing one of the application types described below, applicants for CTE licenses must apply directly to TSPC for the license or endorsement they seek. Failing to apply to TSPC for the license or endorsement will result in an incomplete process.

Currently there are three different paths to a CTE teaching license.

Applying directly from Business & Industry

Applicants for CTE licensure from Business and Industry apply for the **Restricted CTE License** in the career area for which they are qualified to teach**.** The Restricted CTE Teaching License qualifies its holder to teach in an ODE-approved Career and Technical Education Program of Study in an Oregon school district, education service district, or charter school assignment. The Restricted CTE Teaching License is issued to qualified individuals who have at least an associate's degree, or equivalent, and relevant a

Adding a CTE endorsement to a current Oregon teaching license

Applicants holding a current Oregon teaching license apply for the **CTE Endorsement,** in the career area for which they are qualified to teach. Only Commission-adopted CTE endorsements may be added to teaching licenses. To add an endorsement to an existing teaching license, the applicant must complete the ODE-approved CTE application process, which may include completion of a CTE Professional Development Plan. ODE may require the licensed teacher to complete additional work experience or education through the CTE Professional Development Plan and the LCA process.

Applying with a CTE license from another state

Applicants holding a non-CTE (regular) teaching license *OR* a CTE teaching license with CTE endorsement(s) from another state must complete the ODE CTE application process. Upon completion of the ODE CTE application process, the applicant may be eligible for the Restricted CTE, Preliminary CTE or Professional CTE license, depending on the individual qualifications.

Other important information regarding CTE Licensure

These paths may include an Instructor Appraisal Committee. Regional Coordinators facilitate the committee and also advise the instructor and district. Often, Regional Coordinators also serve as formal or informal mentors. ODE Specialists review the CTE licensure applications and recommend, or not, the applicant for licensure to the Teacher Standards and Practices Commission (TSPC). TSPC receives the C-1 application and fee, grants the license and manages the renewal process. Once received, CTE instructors are responsible for completing the requirements for maintaining their licenses. Administrators monitor professional development plans and evaluate instructor effectiveness.

Please contact your Regional Coordinator if you have questions about licensure or know of a teacher in your building who is interested in adding a CTE endorsement. Also, if you anticipate an opening, be sure to keep your Regional Coordinator in the loop as soon as possible. ODE provides extensive guidance on CTE licensure as part of their web resources, which can be found here:

http://www.clackamas.edu/academics/skills-development-training/cte-licensure-courses

PACTEC Forms

The forms shown in this manual are examples only and not to be used when submitting to the PACTEC office. These forms are available as PDFs on our website, https://www.pcc.edu/pactec/forms/.

Professional Development Funds Request

Contact Karin Wriggle, PACTEC Budget Program Specialist, with questions

- Professional Development Funds Request
- Travel Reimbursement Request Form

Other Forms

- Equipment Purchase Request Form
- Supplanting Form

Formula Calculations

All Perkins allocations—from the federal level to the states and from the states to their local entities—are driven by funding formulas within the law, although states are given some latitude regarding how funds are shared. In Oregon, the Perkins allocation is divided evenly between secondary and postsecondary before the federal funding formulas are run for eligible recipients to use for local program improvement. Allotments to states are census-based, with 50% of the formula coming from the percent of population aged 15 to 19 inclusive; poverty is not a factor in the state level formula (Perkins Section 111(a)(2)).

Secondary awards are based on student populations from the US Census Department. Seventy percent of the formula is based on the population of students ages 5-17 at or below the poverty guidelines within the district; 30% is based on total district census data (Perkins Section 131 (a) (1-31)).

Postsecondary awards are based on Pell Grant recipient and BIA (Bureau of Indian Affairs) assistance recipient student counts (Perkins Section 132 (a)(2)). The total allocation available to postsecondary is divided by this count to obtain a per student amount.

Consortiums and Fiscal Agents

Local education agencies that do not generate the minimum formula amount defined in the Perkins law ---$15,000 for secondary and $50,000 for postsecondary—are required to join or form a consortium for fiscal management and coordination. Local consortium agreements describe how they will operate to utilize local funds, but Perkins law is very clear regarding how funds are to be used, namely that all allotting of funds must be done at the consortium level - subsection 131(f)(2). "Granting back" or "flowing through" funds can cause the consortium's entire amount to be reclaimed by the US Department of Education. It is crucial that consortiums, therefore, are very careful to comply with section 131 including:

- Funds must be used only for purposes and programs that are mutually beneficial to all member of the consortium

- Funds can only be used for programs authorized under the Perkins title

- Funds may not be reallocated to individual members of the consortium for purposes or programs benefiting only 1 member of the consortium

- Consortium members must have input on the allocation of funds

- Any equipment or instructional materials purchased remain the property of the consortium and must be clearly identified as such

- Annual reports, budget narratives and spending workbooks serve as the official record ensuring Perkins funds are distributed in accordance with this section

Although these requirements may seem onerous, in fact many districts or community colleges that are eligible for direct funding still elect to join a consortium in order to gain the efficiencies and partnerships available through this model. Additionally, the consortium as fiscal agent assumes the exposure to federal compliance that all Perkins grantees fall under, which does require a level of expertise and knowledge of the law.

All requested changes to consortiums must be made in writing to ODE by February 1.

PACTEC Fiscal Planning Process

In order to fully comply with Perkins, and more importantly continuously improve programs, PACTEC utilizes a fiscal planning process that guides the implementation of the annual Update to the Local Basic Plan. In early Spring, PACTEC begins regional planning.

Planning should be a team process with adequate time built-in for reflection, research, stakeholder involvement and input, and drafting/revising. The following steps are modeled through the Regional Planning Process and should be repeated by each member to develop their own Local Investment Plan.

Step 1: Use Data to Drive Planning. Identify and collect information about the strengths and weaknesses of programs of study. Secondary and Postsecondary Perkins Performance Measurements must be addressed, but other data should also be considered. Notes from various conversations and/or facilitated conversations at stakeholder meetings throughout the year are also important data points that help to identify local or regional needs. All data should be considered in terms of subgroups whenever possible. For the most accurate picture, data should be considered over a period of time versus just a single snapshot.

Secondary Performance Measures	Postsecondary Performance Measures	Examples of Other Data
1S1 Academic Attainment in Reading/Language Arts 1S2 Academic Attainment in Mathematics 1S2 Academic Attainment in Writing 2S1 Technical Skill Attainment 3S1 School Completion 4S1 Student Graduation Rates 5S1 Placement 6S1 Nontraditional Participation 6S2 Nontraditional Completion	1P1 Technical Skill Attainment 2P1 Credential, Certificate, or Degree 3P1 Student Retention or Transfer 4P1 Student Placement 5P1 Nontraditional Participation 5P2 Nontraditional Completion	- Enrollment trends - Dual Credit - Student leadership - Internships - Advisory Committee - Survey results - Prior year Annual Report Demographics - Workforce trends - All-school completion rates and academic performance - Achievement Compacts

Step 2: Stakeholder Planning. The next step uses the information provided by the data to set goals for improvement and develop planned activities for achieving those goals. Stakeholder involvement through various Advisory Boards and fellow professionals helps ensure that the plans are reasonable and relevant and build buy-in to contribute to their success. All plans must first and foremost address any performance measurements that do not meet 90% of the benchmark goal. Perkins Required Elements and other identified local or regional needs should also be addressed in the planning process. Recent applications have allowed the consortium to focus on one or more indicator per element.

Step 3: Aligning Plans to Available Resources. Although not all planned activities require funds, most will require an investment of some kind. Consistent and Perkins-knowledgeable stakeholder input is invaluable for prioritizing how funds will be invested from year-to-year to fairly support the

needs of all local or regional programs of study. Inherent in the wide variety of programs of study and regions across the state is the notion that fair does not always mean equal. Local investments of Perkins dollars are recorded in the budget narrative and spending workbook submitted each Spring. Any changes to the approved spending plans must be requested from ODE.

Step 4: Monitor and Adjust. Throughout the year as planned activities are implemented, they should be evaluated for effectiveness. Reflecting on the activities as they are occurring—both challenges and successes—will help ensure that the goals they support continue to be the focus. It is also helpful to collect the relevant data throughout the year, rather than waiting until writing the annual report. Although the details may change, the continuous improvement of programs through data analysis, stakeholder input and goal-setting will continue and inform planning for the next cycle.

Approved Perkins grants will be posted on the Consortium's website. Local Investment Plan templates can be found in the Appendices.

Monitoring Process

The Oregon Department of Education is responsible for monitoring all eligible recipients to determine compliance with Perkins IV requirements. Although PECTEC is the eligible recipient and therefore subject to monitoring, consortium members also have responsibilities for ensuring compliance. In addition to the annual Basic and Reserve grants submitted by the Consortium, ODE reviews the following documents submitted by member districts each year as follows:

- Spring: Annual Update to the 5-year plans (both Basic and Reserve), detailed budget narrative(s), and planned spending workbooks

- Fall: Annual Reports summarizing completed activities, progress on improving performance, and actual expenditures.

- Programs of Study applications: After Perkins IV was enacted, all eligible recipients in Oregon submitted a timeline for transitioning programs supported by Perkins to Programs of Study. Each year since then all recipients seeking an approved Program of Study—both in accordance with the timeline and new programs--submit applications demonstrating that they meet all the requirements.

ODE's Education Specialists review the submitted documentation listed above and use it as a component of a risk analysis which also takes into account size of award, type of recipient and other progress markers. Recipients deemed "high risk" are consequently scheduled for an on- site monitoring visit. Technical assistance and professional development planning is based on the deficiencies seen through the document reviews, performance data, and recipient input.

The Oregon Department of Education may contract with an independent certified public accounting firm to conduct financial and data reviews. Accounting firm staff will spend one to three days at each school district/public two-year college/consortium.

Purchasing Procedures

Only equipment approved in your Local Investment Plan (LIP) and subsequently approved in the regional Perkins Basic Grant Application will be purchased. Except in pre-approved circumstances, all purchasing will be completed by PACTEC to ensure that all federal purchasing and inventory

procedures are met and that technology purchases are compatible with a school's networking and service agreements.

Inventory Requirements

1. All Object 460* (items over $200) and Object 541* (items $5,000 and over) purchases **must** be added to your Carl Perkins Inventory and marked with a PACTEC Inventory sticker. Two photos should be taken of all items (one of the item itself and one of the item's product and serial numbers and any other identifying codes or numbers. Keep copies of packing slips and/or receipts with your inventory list. The Inventory list must include: purchase date and cost; model, serial number &/or other identifying information; location in building (i.e. program use); and disposition (condition).

2. Districts are responsible for the maintenance and liability of all items listed on their Carl Perkins inventory. Please ensure that all high-theft items (i.e. cameras, iPads, etc.) are stored in a locking cabinet and accounted for regularly.

3. Once the items expire from the district Carl Perkins Inventory list, those items may be used or discarded according to local district policy and wishes. Districts are expected to offer unwanted CTE equipment to other members of the Carl Perkins Consortium.

4. If inventoried items are no longer needed in an "approved" CTE program within the district before they expire from the inventory list, those items **must** be offered to the consortium. If no other member district can use the item for an "approved" CTE program and the Carl Perkins budget committee approves, the item can be expired from the district Carl Perkins inventory and can be used or discarded according to local district policy and wishes.

5. Be prepared for unannounced inventory spot checks.

Please use the following guidelines for keeping your inventory:

*Object 460 Equipment:

- Object 460 items are "equipment-like" non-consumables with a current value of less than $5,000. These are items that 1) have an anticipated useful life of more than 1 year; 2) retain their original shape and appearance with use; 3) are nonexpendable: that is, if the articles are damaged or some of their parts are lost or worn out, it is usually more feasible to repair them than to replace them with an entirely new unit; or 4) they do not lose their identity through incorporation into a different or more complex unit or substance.

- Object 460 Equipment – Technology (i.e. digital cameras, projectors, etc.) must be kept on your Carl Perkins Inventory for 3 years. Note that PACTEC also uses Object 470 for software purchases.

- Object 460 Equipment – Non-Technology (i.e. drill press, commercial cookware, etc.) must be kept on your Carl Perkins Inventory for 5 years.

Object 480 Computer Hardware:

- Must be kept on your Carl Perkins Inventory for 3 years. Object 480 Computer Hardware purchases must also be marked and kept on the Carl Perkins inventory recording their model, serial number and location in the building (i.e. program use).

*Object 541 Capital Outlay:

- Must be kept on your Carl Perkins Inventory for 7 years.

Perkins V Spending Guidance

Much of Perkins V spending is dependent upon the Needs Assessments that have been conducted to identify areas that require funding support. However, there are still several areas that CANNOT be included in Perkins funding requests.

Spending that is not allowed includes:

- Textbooks
- Capital improvements – Ventilation, air quality, security, Safety
- Items considered basic equipment for a program – screwdrivers, baking sheets,
- Furniture, tables, desks
- Replacement items
- Subscriptions to periodicals, newspapers
- Courses required for graduation (Such as personal finance if required by your district.)
- Consumables
- Vehicles to include: Cars, trucks, tractors, boat, ATV, ATC, UTV
- Licenses or permits
- Food
- Articulation agreements
- Personal or Direct benefits to include: memberships, certification, tuition, admission to events, gift cards, prizes, awards, food or coffee
- Alcohol or drugs of any kind

Some potentially allowable expenses:

- Student Leadership may be for a maximum of 3 years. It can pay for leadership, but not student participation
- Some expenses related to Work Based Learning (WBL)
- It may pay for, as long as reasonable in cost and approved by industry advisory board, Approved Industry Certifications for students.

Oregon CTE, Perkins and Civil Rights

The CTE State Plan focuses on more fully integrating academic knowledge and technical employability skills for all learners, ensuring that currently and historically marginalized populations have the support needed to feel welcome and be successful in the CTE program of their choice.

Oregon CTE State Plan

Oregon's Vision for CTE

Oregon's CTE State Plan aims to share a vision and identify actionable strategies for working together to achieve that vision. All Oregonians deserve meaningful careers that support them and their families as they contribute to their communities. CTE is a proven strategy that increases high school graduation rates and creates a pathway for a successful transition into a purposeful career.

With the CTE State Plan, Oregon has an opportunity to improve how we prepare Oregonians to participate in high-wage, high-skill, and in-demand careers1 and, in doing so, put the state on a path to an even brighter future for our communities and our economy. More specifically, we have an opportunity to remove barriers and ensure high-quality learning and access for each learner regardless of race, gender, or zip code. Annually, over 150,000 K-12 learners participate in CTE, and over 5,000 postsecondary students complete CTE programs at Oregon colleges. Regional partnerships, led by CTE Regional Coordinators, exist in every corner of Oregon. CTE Programs of Study exist in nearly every Oregon high school and all 17 community colleges. Secondary students who participate in CTE graduate high school at rates higher than their counterparts who do not participate in CTE; this finding holds true across all demographics. The CTE State Plan will build on the success of the past decade under the Carl D. Perkins Career and Technical Education Act of 2006 (Perkins IV) and improve programs to bring greater consistency and access.

Data and information on students with disabilities also indicate that such students experience better retention and post-school outcomes when they participate in one credit of CTE compared to students with disabilities who are not involved with CTE.2 Oregon has a responsibility to build systems that purposefully remove barriers in light of these compelling facts. The Oregon Department of Education (ODE) is building partnerships with vocational rehabilitation and student services, and offering support to local CTE and special education practitioners through regional training and conference presentations to increase access and for the participation of students with disabilities in CTE. Additionally, too often participation rates vary by gender in specific Programs of Study. For example, females are underrepresented in Computer Science and Manufacturing programs and males are underrepresented in Education programs. Over the past six years, Oregon has partnered with the National Alliance for Partnerships in Equity (NAPE) to train regional cohorts of instructors and advisors to identify and overcome barriers to success. Oregon will continue to support strategies to address gender inequities by sponsoring recruiting events, providing statewide training, and using state leadership funds to support regional and local evidence-based programs. During the annual review process, ODE will work with partners to monitor performance and participation of all students. In the event any of the performance elements fall short, state level improvement plans will be developed and monitored to ensure intentional steps are taken to address any gaps in performance. Additionally, state staff will continue to offer professional development on providing accommodations for students through discussions with CTE Regional Coordinators, conference sessions, and continued collaboration with student services and vocational rehabilitation.

Each year approximately three high schools and two community colleges participate in an onsite review, as required by the US Department of Education (USDOE). These comprehensive reviews are conducted to prevent discrimination and ensure equal access to programs, courses and the information in them. For each Oregon student ODE provides technical assistance to assist institutions achieve voluntary compliance with the civil rights laws enforced by the USODE Office for Civil Rights. PACTEC and the administration of Region 2A are also available to provide assistance in complying with federal and state laws regarding civil rights, including inclusion, equity, and diversity.

For further assistance you can go to your Regional Coordinator for support and/or resources. Additional resources can also be found at http://www.oregon.gov/ode/students-and-family/equity/civilrights/Pages/CTECivilRights.aspx.

Required Reporting and Performance Measures

The State of Oregon is accountable to the federal Department of Education for its use of Perkins funds. This return on investment is measured through the reporting of data on course enrollment, student performance and other information that demonstrates whether or not programs of study are preparing students for college and careers. Perkins reporting represents just part of the data collected as part of the state's Consolidated Collections.

Accountability for Program Improvement

The Oregon State Plan provides the blueprint for how eligible recipients will implement programs of study and the benchmarks that will monitor progress. Therefore, accurate and timely data reporting is critical because it points directly back to the commitments Oregon made through the State Plan. *In fact, failure to report will disqualify an eligible recipient for funds.*

A primary output of the CTE data collection is the performance measurement reports. Although only Perkins-approved Program of Study data is included the reports, all approved programs must provide data as described below.

CTE Program of Study Updates - October

At the beginning of every school year all Programs of Study are required to inform ODE of any changes they have made in the courses they dropped, added, or changed in regard to credits given. These are submitted through your school's or school district's CTE Coordinator. They, in turn, will inform either the state or the Regional Coordinator of these changes. All Program of Study updates must be submitted to ODE by your school/school district's CTE Coordinator by October 15, 2023.

These updates must include an updated program crosswalk/matrix in order for it to be submitted to ODE. Once program updates are submitted, they reflect "Submitted to Regional Coordinator" and once they are submitted to ODE they will reflect "Submitted to ODE." Once the program updates are approved by ODE they will reflect "Approved."

Updates past the due dates will require submission of a "Request to Re-open CTE Program Update Application" form signed by the requestor and their superintendent.

CTE Spring Data Collection - June

CTE Student Data

The Spring CTE Student Data collection provides essential demographic information. This collection provides data for Perkins reporting by sub- populations, comparison data between CTE student and non-CTE student populations, identification of participants and concentrators, CTE program improvement planning, and populating the web pages of CTE data posted online.

CTE Course Enrollment (Perkins)

The CTE Course Enrollment collection is dependent on accurate, complete and on-time submission of the CTE Program Update the previous fall. The CTE Course Enrollment collection contains the students enrolled in CTE classes and programs. This collection is essential to provide data for Perkins reporting, CTE program improvement planning, and populating the web pages of CTE data posted online.

The current year deadline for the CTE Student and CTE Course Enrollment data submission is found on the CTE Data & Reporting Schedule on the ODE website (see schedule below)

Postsecondary Data

Community Colleges in Oregon also report enrollment and performance data on students who complete courses in state-approved career and technical education programs. The data is received by the state data collection system (OCCURS). It is compiled, analyzed and reported to the U.S. Department of Education to fulfill career and technical education federal grant funding requirements (Perkins funds). The information is also used for policy development as requested or required by the Oregon State Board of Education, the legislature, state and college personnel and for educational research.

Perkins CTE Programs of Study – From Development to Closure

The goal of Perkins Programs of Study is to become a Level 3 or above approved program. From beginning with either a program that is in development or new, teachers work on continuous improvement of the program and the classes in the program. These goals include:

- Maintaining rigorous academic standards
- Expanding the opportunities to experience "real world" activities and learning
- Keeping all learners engaged in the material and skills taught
- Aligning the program's curriculum to industry standards
- Linking secondary instruction to meaningful college credits or industry credentials
- Providing learning opportunities that will assist students with college credit in the programs career area
- Keeping the goal of high wage and high demand occupations in focus
- Providing students with safe access to appropriate tools and equipment that reflect what is used by the occupational workforce
- Revising the program based on student performance, economic demand and employer requirements
- Providing accurate and timely information and support that will assist students identify, pursue, transition, and complete a pathway to a future career
- Ensuring that all students and their families are informed and have access to the Program of Study
- Providing students and their families with appropriate knowledge and experiences to help them make informed education and career decisions
- Building students' employability skills through leadership opportunities and work-based learningThese goals are met through:
- Continuous professional development that is focused on expanding their knowledge and skill base and aligns with the long-term goals of the program.
- Maintaining an active and engaged Advisory Board that can review the skills sets, equipment, and tools to ensure there are equivalent industry standards which meets minimally twice a year

The table below illustrates the growth and desired goals of Programs of Study. These can take time for new and developing programs. Developing Programs of Study are given three years to achieve a Level 3. New programs should have a minimum of Level 2 and 3 in the various Elements.

Oregon CTE Program of Study Quality Rubric

www.oregon.gov/ode/learning-options/CTE/resources/Documents/High%20Quality%20Programs%20of%20Study%20Rubric.pdf

Perkins CTE Program of Study - In Development Forms and Information

A Perkins CTE Program of Study that is in development has access to a portion (30%) of what a fully developed Program of Study has in available funds. The Perkins Specialist is available to assist any teacher that is ready to start-up a Program of Study. She is here to supply teachers with the appropriate forms (partially completed) for your Program of Study, instructions, and one-on-one or group facilitation in completing the application. This is usually done in the spring in a group setting and must be completed by the middle of June.

Please note: To be eligible for Perkins POS development funds, a program component:

1. *Must not have existed in the school or college within the last three years*

2. *Must be designed to meet local demand for High Demand/High Wage careers*

3. *Must have at least 70% resource support from the local district or community college*

The information and forms you will need to create a "In Development" Program of Study are:

✔	Needed Items
	Course numbers for the courses in your program that are generated by your school or school district. These are often the same as NCES course codes.
	NCES/SCED course codes for the courses in your program. These codes are generated by your school or school district if the courses already exist. If you are creating the courses as you create the Program of Study there is a link on the application that displays all of the possible NCES codes. Work with your principle or Perkins Specialist to determine which code would be most appropriate for your courses.
	A completed Program of Study Crosswalk/Matrix for the high school and community college. The Perkins Specialist will have one for your career area and a completed community college Crosswalk/Matrix.
	Course names and numbers for articulated college courses. You should have these on file with your Articulation Agreement.
	A proposed short (for the first year) and long (for the next two to three years) budget. The Perkins Specialist has an Excel spreadsheet to use for this document.
	A Plan (brief bulleted list of planned activities) that will move the development of the program to a CTE Program of Study over a period of no more than three years. This list should address all core elements of a CTE Program of Study. This will include a very brief (one line or less) of:

PACTEC

	- Explanation of how your POS is aligned with challenging academic standards at the HS and CC levels - A description of the level of alignment and/or articulation that exists (or will exist) for your POS (you can include private schools and universities, etc.). - A description of alignment and/or articulation activities that have occurred, and who participated from HS and CC levels. - A description of how the POS will be evaluated and by whom. - How students receive information, guidance, and/or counseling specific to your CTE Program, including career and job market information and college program information. - The written information that is provided to all students in your CTE POS informing them of available articulated college (or university) credits, dual credit, expanded options, scholarships and other postsecondary opportunities. - Description of access and recruitment to courses in your CTE POS are provided for all students including, but not limited to all Oregon and federal protected classes. - Description of how accommodations are made to assure students with special needs can participate in your CTE POS. - Information on what assistance is provided for students wishing to participate in this CET POS for whom English is not their native language. - A description of how Professional Development (PD) will be planned and implemented, based on the needs of the POS. - A description of any planned joint PD ventures for HS and CC teachers along with regional trainings.
	A description of how the program will be sustained once it has been approved. Please include a description of the planned use of Perkins funds for enhancement of student learning opportunities.
	A list of members of your Business Advisory Committee/Board.
	Two letters of support from Advisory Committee members or other relevant local businesses. The Perkins Specialist has a template for this letter.
	A report from Oregon's Employment Department verifying the high wage – high demand element of the Program of Study's career area. This can be for any level of that career area. The Perkins Specialist can find this information for you. If you would like to look at it, the website for retrieving the information is https://www.qualityinfo.org/jc-oprof/. The report can be produced by

There are also online resources on the ODE website (https://www.oregon.gov/ode/learning-options/CTE/resources/Pages/CTEPOS_Application_Resources.aspx). On this page you will have access to blank forms and the instruction guide that is provided by the Perkins Specialist.

PACTEC

Perkins CTE New Program of Study Forms & Information

The Perkins Specialist is available to assist any teacher that is ready to develop a new Program of Study. She is here to supply teachers with the appropriate forms (partially completed for your Program of Study), instructions, and one-on-one or group facilitation of completing the application. This process begins in February or March and must be completed by the middle of June.

The information and forms you will need to create a new Program of Study are:

✔	*Needed Items*
	Course numbers for the courses in your program that are generated by your school or school district. These are often the same as NCES course codes.
	NCES/SCED course codes for the courses in your program. These codes are generated by your school or school district if the courses already exist. If you are creating the courses as you create the Program of Study there is a link on the application that displays all of the possible NCES codes. Work with your principle or Perkins Specialist to determine which code would be most appropriate for your courses.
	Course names and numbers for articulated college courses. You should have these on file with your Articulation Agreement.
	A completed Program of Study Crosswalk/Matrix for the high school and community college. The Perkins Specialist will have one for your career area and a completed community college Crosswalk
	Explanation of how your POS is aligned with challenging academic standards at the HS and CC levels.
	Explanation of who participated in the decision of which skill set(s) were used in your POS.
	Description of who participated in the development of the crosswalk of the skills sets to HS and CC courses (your CC partner(s)).
	A description of the level of alignment and/or articulation that exists (or will exist) for your POS (you can include private schools and universities, etc.).
	A description of alignment and/or articulation activities that have occurred, and who participated from HS and CC levels.
	Data that was used in designing your POS, and the effect that the data had on the design of the program.
	The members of your Business Advisory Board.
	A description of how the POS will be evaluated and by whom.
	A description of what criteria you will use to determine if the POS is successful.
	A description of the process you will use to decide if any changes need to occur because of the POS evaluation.
	How students receive information, guidance, and/or counseling specific to your CTE Program, including career and job market information and college program information.

	How students participate in CTE POS specific career related learning experience or related work experience.
	How students' education planning is developed around information specific to your CTE POS.
	Description of the extended application project or capstone experiences are for your CTE POS. - Optional
	The written information that is provided to all students in your CTE POS informing them of available articulated college (or university) credits, dual credit, expanded options, scholarships and other postsecondary opportunities.
	Description of the efforts that made to provide information to student who are considered non-traditional by gender to the occupations resulting from this CTE POS.
	Description of access and recruitment to courses in your CTE POS are provided for all students including, but not limited to all Oregon and federal protected classes.
	Description of how accommodations are made to assure student with special need can participate in your CTE POS.
	Information on what assistance is provided for students wishing to participate in this CET POS for whom English is not their native language.
	A description of any student leadership opportunities that will be available for students on HH and CC level.
	A description of how Professional Development (PD) will be planned and implemented, based on the needs of the POS.
	A description of any planned joint PD ventures for HS and CC teachers along with regional trainings.
	A visual pathway for students in your Program of Study beginning in their freshman year through obtaining an AA in the career area. - Optional

There are also online resources on the ODE website (https://www.oregon.gov/ode/learning-options/CTE/resources/Pages/CTEPOS_Application_Resources.aspx). On this page you will have access to blank forms and the instruction guide that is provided by the Perkins Specialist.

Perkins CTE Renewal Process and Forms

For the 2021 school year the renewal process has been suspended until ODE has developed a new skill set matrix along with an updated and more relevant renewal form for those Programs of Study that were required to renew this year. The renewal cycle will now be based on what Career Area a Program of Study is in. A tentative rotation schedule will be available soon. The Perkins Specialist is available to assist any teacher that is to renew a Program of Study. She is here to supply teachers with the appropriate forms (partially completed for your Program of Study), instructions, and one-on-one or group facilitation in completing the application. This process begins in February or March and must be completed by the middle of June.

The new renewal application may be more focused on where a program is in relation to where the program and teacher currently are in the development of the program and in the process of becoming a Level 4 Perkins approved Program of Study. Teachers will be asked to develop

professional goals that will continue quality improvement and review past goals to determine whether they were met or how they can be met in the new renewing rotations.

The tentative information you will to complete a Program of Study renewal form are:

✔	Needed Items
	Course numbers for the courses in your program that are generated by your school or school district. These are often the same as NCES course codes.
	NCES/SCED course codes for the courses in your program. These codes are generated by your school or school district if the courses already exist. If you are creating the courses as you create the Program of Study there is a link on the application that displays all of the possible NCES codes. Work with your principle or Perkins Specialist to determine which code would be most appropriate for your courses.
	Course names and numbers for articulated college courses. You should have these on file with your Articulation Agreement.
	A completed Program of Study Crosswalk/Matrix for the high school and community college. The Perkins Specialist will have one for your career area and a completed community college Crosswalk
	A. How students receive information, guidance, and/or counseling specific to your CTE Program, including career and job market information and college program information.
	B. How students participate in CTE POS specific career related learning experience or related work experience.
	C. How students' education planning is developed around information specific to your CTE POS.
	D. A description of the extended application project or capstone experiences are for your CTE POS.
	E. The written information that is provided to all students in your CTE POS informing them of available articulated college (or university) credits, dual credit, expanded options, scholarships and other postsecondary opportunities.
	F. A link or description of the efforts that are made to provide information to student who are considered non-traditional by gender to the occupations resulting from this CTE POS.
	G. How access and recruitment to courses in your CTE POS are provided for all students including, but not limited to all Oregon and federal protected classes.
	H. How accommodations are made to assure student with special needs can participate in your CTE POS.
	I. A link or description of what assistance is provided for students wishing to participate in this CTE POS for whom English is not their native language.
	J. The names of your Advisory Board members.
	A visual pathway for students in your Program of Study beginning in their freshman year through obtaining an AA in the career area. - Optional

There are also online resources on the ODE website (https://www.oregon.gov/ode/learning-options/CTE/resources/Pages/CTEPOS_Application_Resources.aspx). On this page you will have access to blank forms and the instruction guide that is provided by the Perkins Specialist.

Program Closure

Perkins Eligible Recipient

Carl D. Perkins requires any eligible recipient to have at least one CTE Program of Study to receive any Perkins funding. If a school reduces their staffing and/or program offerings to the point where it no longer meets the definition of an Oregon approved CTE Program of Study, the institution is no longer eligible to receive any Perkins allocation. (Perkins Act Section 134)

Perkins Eligible Investments

In Oregon, the State Perkins Plan requires that Perkins funds may only be invested in an approved CTE Program of Study. By definition a CTE Program of Study involves a partnership between an Oregon public high school and Oregon public community college. If this partnership is dissolved due to one entity no longer offering the sequence of courses to complete the CTE Program of Study, then Perkins funds can no longer be used to fund any part of the program. (Perkins Act Sec 122(c); Oregon Perkins Plan Section (2))

Staffing and course offerings may still be under consideration into the early fall. Perkins grant activities and budgets should be planned with the best information available. As always if school opens and the scope of the program changes, the budget should be revised to reflect the actual activities and investments that will be made. (EDGAR 80.30)

Notification

While there is no requirement in the Perkins Act or in the Oregon State Plan for immediate notification of a program closure, the following guidance should be used when a program is being eliminated and will no longer qualify as an approved CTE Program of Study.

Notification of Partners

If a program is eliminated at the secondary or postsecondary level, the approved CTE Program of Study dissolves and is no longer eligible for Perkins funding. When this happens, it is crucial to notify your partners in the CTE Program of Study immediately. As a courtesy, notification should take place when the reduction is being seriously considered and then immediately following the decision to eliminate the programs. This allows the partners to make alternative plans for staffing and course offerings as well.

Notification of CTE Regional Coordinator

Please follow the guidance above to notify the CTE Regional Coordinator of impending program closure. Regional coordinators may be able to assist with advocacy issues as well.

Notification of Oregon Department of Education (ODE)

As the state agency responsible for the Perkins grant and reporting it is also crucial to maintain contact with the Oregon Department of Education during this time. Please provide a written notification to ODE when a program is reduced and no longer qualifies as a Perkins Program of Study.

Distribution of Assets

Definition of Asset

Assets purchased with Carl D. Perkins funds are under the control and responsibility of the fiscal agent that purchased those assets and can be used only for the intents and purposes of the Act. In the case of a consortium acting as fiscal agent for a group of schools, the consortium fiscal agents have the management, decision making and property control responsibility for purchases made on behalf of any component school or institution.

For the purpose of this CTE Program of Study Closure Guidance the assets we are referring to is any item (equipment, supplies, inventory) purchased with Carl D. Perkins funds that has an initial usefulness of greater than a single year and an initial cost of more than $200.

According to the Oregon Accounting Manual, capital assets are all tangible or intangible property used in an agency's operations that have initial estimated useful lives beyond a single year and have an initial cost of at least $5,000. Non-capital assets are all tangible and intangible property used in agency operations that have initial estimated useful lives beyond a single year and have an initial cost of less than $5,000. (OAM 10.50.00PR)

Prior guidance from the Oregon Department of Education further defined assets to include all tangible and intangible property used in agency operations that have initial estimated useful lives beyond a single year and have an initial cost of more than $200.

Use of Asset and Distribution

Assets shall be used in the program for which it was acquired as long as needed, whether or not the program continues to be supported by Federal funds. When no longer needed for the original program, the asset may be used in other activities currently or previously supported by Carl D Perkins funds or other Federal funds. (EDGAR 80.32 (c)(1))

Direct Grant Recipients

In a direct grant recipient scenario, if the CTE Program of Study no longer meets the CTE Program of Study level but continues as a State Recognized or Elective program, the assets could remain in use by that program. If the program dissolves entirely, the assets could be relocated to another current or previously funded federal program for use. Examples may include: Other Perkins POS, 21st Century Community Learning Centers, ESEA programs, or Charter School Program Grant recipients.

Consortium

In a consortium, as mentioned above, the asset is under the control and responsibility of the consortium fiscal agent. Therefore, the consortium project manager must determine if those assets can be used in other approved CTE Programs of Study within the consortium. This means the asset may be relocated to another school or district. If no approved CTE Program of Study needs the asset, they may shift the use to other past or current federally funded programs. The consortium should have policy in place in their fiscal department to regulate this distribution process.

There are also online resources on the ODE website (https://www.oregon.gov/ode/learning-options/CTE/resources/Pages/CTEPOS_Application_Resources.aspx). On this page you will have access to blank forms and the instruction guide that is provided by the Perkins Specialist.

Fiscal Guide

Meeting Federal Spending Requirements

Overview
The Oregon Career and Technical Education (CTE) State Plan is a high level four-year strategic plan that integrates state and federal priorities into an implementation plan for the "Strengthening Career and Technical Education for the 21st Century Act" (commonly known as Perkins V). Leveraging ongoing partnerships across the state, the CTE State Plan identifies actionable strategies to ensure high-quality learning that is accessible to all learners in Oregon.
(https://www.oregon.gov/ode/learning-options/CTE/FedFund/Pages/Oregon-CTE-State-Plan.aspx).

With the 2023-2025 application cycle come some extensive changes. The CTE/Perkins grants have become part of the secondary Integrated Application Process. This is good news, as CTE is at the table as districts engage communities and determine priorities for achieving student success. Implementation for this two-year cycle will involve many changes in our work and our timelines. The resources below are offered to assist with these changes.
First, all funds must be expended strategically in pursuit of one or more of the following

Five Oregon Perkins Goals:

- **Standards** & **Content**
- **Alignment** & **Articulation**
- **Accountability** & **Evaluation**
- **Student Support Services**
- **Professional Development**

Second, Perkins V details the **Required Activities for Use of Funds** detailing how the fund must be used to support High School through Community College Programs of Study.

Improve and Enhance CTE
Federal grant funds must **improve and enhance** CTE Programs of Study and **not supplant state or local funds.** Federal funds may not result in a decrease in state or local funding that would have been available to conduct the activity had federal funds not been received. In other words, federal funds may not free up state or local dollars for other purposes, but should **create or augment CTE programs to an extent not possible without federal dollars.** The Consortium must be able to demonstrate that federal funds are **added** to the amount of state and local funds that would be made available for uses specified in your plan.

Determining Supplanting

The critical question in determining whether there has been a supplanting violation is whether federal funds were used instead of funds from non-federal sources. **It will have to be shown that the federally funded activity would not have been funded by state or non-federal sources.**

When auditors review compliance with non-supplant rules, they often use the following test: **What would the recipient have done in the absence of federal funds?** If the project would have been carried out anyway with non-federal funds, there will be the presumption of supplanting. During the audit appeal process evidence would be required to disprove that presumption.

On the other hand, if the auditor were to find evidence that in the absence of those federal funds, the specific activity or program would not have been carried out, there would be no presumption of supplanting.

Think of it this way –

The law is designed to ensure that **federal funds pay for something extra!**

NOT day-to-day operational costs including basic teacher and student supplies.

Using Perkins Funds to Purchase

Step 1 - Planning and Thought: Identify the need
With the issue of Improvement/Expansion of your Program of Study vs the Supplanting funds the following questions can be used as a guide as you begin to review your needs for the 2023-2024 school year.

Can you answer "YES" to the Following?

1. Will the funds be used to purchase consumable products with a life of less than 1 year?
2. In the past, the supplies have not been purchased using general funds or other grant funds?
3. Will the supplies be used in a manner that supports the increase in student performance in a CTE Program of Study this year?
4. **Will the purchase be used exclusively to help improve technical and/or academic performance of students enrolled in courses associated with CTE Programs of Study?**
5. Was the expenditure appropriately identified in the *Basic Perkins Grant* and budget?
6. Will the purchase meet the "allocable" requirements - All purchasing completed by December 1st and used within the classroom for that school year?

When considering the purchase of Materials and Supplies:
- Equipment· (of any amount) purchased using Perkins funds, solely for teacher use is not allowed. All equipment purchased with Perkins funds must be for student use or utilized in instructing students in the classroom.
- Use of Perkins funds to pay for any expense that was previously paid by the local school district is considered supplanting. This may include: salaries, textbooks, stipends etc.
- Consumable supplies such as toner cartridges, paper, baking supplies etc. are the responsibility of the local school district.
- Perkins funds cannot be used to purchase items such as mugs, T-shirts, pencils etc. to promote CTE programs.
- Textbooks can be ordered with Perkins funds for new courses only but would have to have very good rationale for this to be a Perkins expense for your program of study. Textbooks for existing CTE courses are the responsibility of the local board of education. (NOTE: textbooks are a very hard sell to the Oregon Department of Education. Please think about class sets of references or resource books.)

When considering the purchase of Equipment: *(Federal regulations define "Equipment" as $5,000.00 or more.)*
- Is the equipment necessary to accomplish what is stated in the Program of Study plans and

not currently available in the school?

- Is the equipment purchase necessary for effective instruction in the program area?
- The Questions and Goals, and Strategies sections of the application must show how the
- equipment will be integrated into the curriculum.
- Equipment purchased, in whole or in part, with Perkins funds must not result in any direct financial benefit to any School building, School District, Portland Community College or its employees.

Your purchase **may not** be made ...

- If funds will be used to upgrade, replace or repair existing equipment.
- If funds will be used to enhance infrastructure such as wiring, plumbing or construction to a facility.
- If equipment will be considered a permanent part of the instructional facility such as air conditioners, smoke or exhaust removal systems and other similar fixtures.

(State of Oregon Requirement: A specific, detailed, line-item request for equipment more than $4,999 must be in the annual budget approved by the Oregon Department of Education as a line item equipment purchase prior to the year in which the purchase will be made.)

Step 2 - Purchasing Procedures: Identify the need

1) Confirm that the purchase(s) you would like to for the 2023-2024 school year qualifies as allowable expenses and meets the goals of your Programs of Study.
2) Email Mary Dakin, CTE Regional Coordinator and Karin Wriggle, PACTEC Program Specialist to request appropriate forms at Mary.Dakin@pcc.edu and Karin.Wriggle1@pcc.edu
3) Complete Perkins Request Form
4) Complete Supplanting Questionnaire and **have your principal sign**
5) Email all completed forms to Karin.Wriggle1@pcc.edu

For Equipment purchases- (defined as $5,000 or more) Complete the steps above and...
  ☐ Include shipping costs and copies of any internet or catalog research you
      - conducted for your purchase.
  ☐ <u>Three</u> bids must be submitted with the request.

Purchasing Deadlines

All major purchases must be made by December 1st.
<u>This is a state requirement.</u> Perkins grant purchases are intended to impact student performance during the year the money is awarded, therefore it is expected that Perkins purchases will be made early in the designated school year and that students will have the benefit of the purchases during that year.

Some expenditures, such as field trips and professional development are ongoing; for such

expenses submit as soon as possible.

Local Investment Planning Guidance

In addition to increased program quality accountability, Perkins IV has also tightened up how funds can be used to support CTE. Essentially, the focus of Perkins is to improve, enhance, expand, modernize, elevate or align the program to current industry standards. Although current law does allow for consortium leadership to make some local decisions, there are some that are outside of the local process. Further complicating matters, interpretation of federal law and budget guidelines can be fluid; ODE serves as the link between evolving federal guidance and eligible recipients. Likewise, ODE depends on the consortium to spend Perkins funds responsibly, avoiding the gray areas as much as possible.

Although a "yes" or "no" chart for Perkins spending does not exist, see below for guidance on expenditures to avoid requesting in your Local Investment Plans:

Funds that Supplant	Direct Benefit to Teacher or Student	Other Budget No-Nos

▪ Activities or Services provided with other funds in the prior year
▪ Services that are provided for some students with other funds
▪ All the state and local funds needed to operate in the absence of federal funds
▪ routine operating expenses
▪ building maintenance and repairs
▪ landscaping
▪ custodial service
▪ basic teacher and student equipment
▪ supplies
▪ Capital Improvement
▪ Furnishing of the facility with furniture, operating equipment, teacher computer, etc.
▪ Electrical, plumbing, structural work, heating & cooling
	▪ Admission: Sports event, OMSI, Wildlife Park, Movie, Broadway theater, and etc.
	▪ Tuition, Fees, Books associated with college /university credit.
	▪ Membership Dues
	▪ Promotional Items
	▪ Promotional Advertising
	▪ Any portable technology device that is for personal or administrative use:
	  ▪ Technology devices to be used for instructional (student focused) and curriculum purposes are Okay
	  ▪ The devices should not be checked out to the student for an extended period of time – personal use.
	  ▪ Vigilant inventory procedures necessary to safeguard this investment.
		• Vehicles
		• Text Books
		• Percentage Formulas
		• Membership Dues
		• Student Leadership (competitions)
		• Perkins III Elements (School to Work)
		• Articulation Agreements.
		• Non-Program of Study expenditures
		• Program Closure
		• State Recognized Program (SRP)
		• Administration beyond 5%
		• Annual subscriptions: If vital, it should be local obligation.
		• Misc. or General Supplies, i.e. bits, toner, knives
		• Activities for Elementary or Middle School students
		• Safety Items, i.e. safety glasses, lab coats, welding helmets
		• Replacement equipment that is not an upgrade

Budget Narrative Changes and Revisions

Any changes to the approved Perkins Budget Narrative expenditures that result in a variance of more than 10% in any function code or object code require advance permission and amendment to the Perkins Budget Narrative. In order to request a change, please follow these steps.

1. Send an email to ODE staff – Reynold Gardner. In the email, describe:

    a. The Program of Study involved and the proposed changes (What is or is not being done or purchased and at what cost?)

    b. The rationale for the change (Why is the change needed?)

    c. The new course of action and the Programs of Study involved (What are you now going to do and what are the costs associated with the course of action?)

    d. How the new course of action aligns with the local needs assessment and priorities

2. Email verification will be sent from ODE staff providing authorization to move forward and implement the changes within the Perkins Budget Narrative within SMApply.

3. The revised plan is not authorized for spending until approved changes are included within the SMApply Perkins Budget Narrative.

Portland Community College as Fiscal Agent

As stated in the Consortium agreement, Portland Community College (PCC) serves as PACTEC's fiscal agent, therefore, PACTEC is required to also abide by its purchasing guidelines. These guidelines are shown below. If you have any questions regarding any potential purchases and PCC's purchasing and contract requirements you can contact Karin Wriggle at karin.wriggle1@pcc.edu.

These rules and requirements are in place to ensure that there is no conflict of interest and/or the procurement will not encourage favoritism in the award of College Contracts, as stated in the Community College Rules of Procurement (https://intranet.pcc.edu/finance/wp-content/uploads/sites/3/2020/05/FINAL-APPROVED-Procurement-Rules.pdf).

PCC Contracting/Purchasing Requirements

	Informal		Formal
	Small Procurement	Intermediate Procurement	Formal Procurement
Goods, Trade Service Contract (TSC)	< or = $10,000(Trade Service PO's will be sent to the supplier by the Purchasing Department ONLY)	$10,001 - $150,000 TSC that is a Public Improvement Contact Purchasing	> $150,000 Contact Purchasing
Type of Procurement	Informal Quotes (Direct Award)	Informal 3 Written Quotes	Formal RFP/ITB
Info Required To Purch	Copy of Quote	Copies of 3 quotes	Description of goods, expected delivery date, Eval Criterea, Price .
Timeframe before Soliciting*		3-5 Full Workdays	15 Full Workdays
Contract To Be Issued	PO or TSC PO	PO or TSC	PO/Contract - Board Approval Required
Personal Service	< $10,000 PO will be issued (PSC PO's will be sent to the supplier by Purchasing ONLY)	$75,000 - $150,000	> $150,000
Type of Procurement	Informal Quotes (Direct Award)	Informal 3 Written Quotes	Formal RFP QBS
Info Required To Purch	Copy of Quote	Copies of 3 quotes	Description of goods, expected delivery date, Eval Criterea, Price . Board Approval.
Timeframe before Soliciting*		3-5 Full Workdays	15 Full Workdays
Contract To Be Issued	PSC PO	PSC Contract	PSC Contract- Board Approval Required
Architect, Engineers and Related Services	<$100,000	$100,00-$250,000	>$250,000
Type of Procurement	Informal Quotes (Direct Award)	Contact Purchasing	Formal RFP QBS
Info Required To Purch	Copy of Quote, Milestones, Scope.	SOW, Milestones, Eval Criterea, Pre-Proposal date and location, Anticipated Cost	SOW, Milestones, Eval Criterea, Pre-Proposal date and location, Anticipated Cost
Timeframe before Soliciting*	1-3 Full workday	3-5 Full Workdays	15 Full Workdays
Contract To Be Issued		Coordinated with P&CC- Board Approval May Be Required	Coordinated with P&CC- Board Approval Required
Public Improvement	$10,000 - $50,000	$50,000 - $100,000	>$100,000
Type of Procurement	SEE TRADE SERVICE REQUIREMENTS BELOW (3 - written Quotes)	3 - written Quotes	Formal ITB/RFP
Info Required To Purch	Copy of Quote, Milestones, Scope, Cost	SOW, Milestones, Pre-Bid date and location, Anticipated cost.	SOW, Milestones, Pre-Bid date and location, Anticipated cost.
Timeframe before Soliciting*	1-3 Full Workday	3-5 Full Workdays	15 Full Workdays
Contract to be issued	PCC Trade Services Contract, <$10k TSCPO	May be coordinated with P&CC	May be coordinated with P&CC- Board Approval Required

Teacher/Instructor Rate of Pay

PCC employees and/or high school teachers that participate in PACTEC activities, such as Consortium meetings, professional development activities, conference attendance that are not paid by their respective high school districts will be paid at the college rate of $50.00 an hour.

Being Paid through Multiple PCC Sources

If an employee or teacher is being paid from different grant funding sources, is paid through grant funding and general funds; or is paid by more than one funding source, they must record the time they spend in each of these areas. Below is an example of an available spreadsheet to use for this purpose. The spreadsheet is available through the PCC Finance Forms webpage (https://intranet.pcc.edu/finance/forms/) and will need to be unlocked to use.

LABOR DISTRIBUTION WORKSHEET

Jane Dough

Name

R500001

Job

Monthly Time Report   Bi-Weekly Time Report

Program	Total Hours	% of time	11	12	13	14	15	16	17	18	19	30	31	1	2	3	4	5	6	7	8	9	10	11	12	13	14	15	16	17	18	19	20
1 Perkins Basic	8.00	44.44%	5.00	1.00	2.00																													
2 Perkins Reserve	10.00	55.56%	3.00	2.00	5.00																													
3	0.00	0.00%																																
4	0.00	0.00%																																
5	0.00	0.00%																																
6	0.00	0.00%																																
7	0.00	0.00%																																
8	0.00	0.00%																																
9	0.00	0.00%																																
10	0.00	0.00%																																
Totals	18.00	100%	8.00	3.00	7.00																													

FOR PAYROLL'S USE ONLY

Labor Distribution

Fund #	% Worked		Fund #	% Worked
1	44%		6	0%
2	56%		7	0%
3	0%		8	0%
4	0%		9	0%
5	0%		10	0%
	100.00%			100.00%

Mileage Breakdown Exception:
If mileage is different than above, please note the percentage breakdown below (they should equal 100%)

Fund #	% Worked		Fund #	% Worked
1 0	0%		6 0	0%
2 0	0%		7 0	0%
3 0	0%		8 0	0%
4 0	0%		9 0	0%
5 0	0%		10 0	0%
				0.00%

Instructions
1. NO MANUAL ENTRIES
2. Do not add additional funds without manager approval
3. Do not include leave time on this form. All leaves should be reported on the standard timesheet form

I declare this to be a correct report of my work that will be used to determine my earnings.

_____   Date _____

Employee Signature

PACTEC/PCC Travel Policies and Procedures

When traveling for PACTEC events or activities all participants must follow PCC travel policies and guidelines. This includes documentation that is needed for reimbursement and per diem reimbursement for meals. Some of the important things to know and remember are:

- All required request forms need to be completed within the allowable time frame for any events or activities that are to be paid for by PACTEC

- Those events or activities have to comply with the professional development guidelines outlined in the table in the section below.

- PACTEC will only reimburse schools, school districts, or individuals for airline or other forms of travel. They will not pay for tickets directly.

  Teachers and other persons that travel will be paid per diem for meals in accordance with PCC's rate, which is dependent on where the event/activity takes place. These per diem rates include tips for meals and luggage handling. The per diem rates are based on date and location traveled. These can be found at https://www.gsa.gov/travel/plan-book/per-diem-rates/per-diem-rates-lookup.

- PACTEC will make arrangements and pay for lodging and event/activity fees. If the teacher is attending an event/activity that they requested, they will need to complete the Professional Development Request form that can be obtained through Karin Wriggle (karin.wriggle1@pcc.edu).

- Retain all receipts for meals (if cost is more than per diem amount), transportation, and other miscellaneous expenses that you would like to be reimbursed. These charges will be reviewed by the PACTEC specialist, the Regional Coordinator and PCC Finance personnel before being reimbursed.

- Travel with a personal vehicle will be reimbursed using the prevailing federal mileage rate published by the IRS, which is currently 57.5 cents per mile.

- Contact Karin Wriggle for other questions or concerns regarding travel policies at karin.wriggle1@pcc.edu.

PACTEC CTE Professional Development Guide

As Perkins has evolved, the role of professional development has gained importance in supporting the program of study elements. Currently, at least ten percent of Perkins funds must be dedicated for professional development focused on instruction although most eligible recipients invest significantly more.

Funded professional development should be long-term, sustained, and focused on student engagement or program improvement. Perkins requires that all secondary and postsecondary POS instructors participate annually in formal, program-related professional development focused on instruction and following the Consortium's plan. Conferences are allowable as long as they are tied to the deliverables of the professional development plans. In order to expend Perkins funds, consortium member instructors are expected to participate in appropriate regional professional development (motion passed 8/18/2009).

PACTEC, continue to plan and provide Region 2A professional development that meets the needs of Perkins IV. Regional activities will be planned throughout the year to constitute a series of workshops and trainings based on Perkins requirements, program approval, emerging diploma & degree requirements, alignment and other needs identified through the regional planning process. These regional series of

events will be supplemented by state and local initiatives that dovetail and complement the Perkins Required Uses of Funds. See below for examples of activities that meet these requirements. Reimbursement requests are available online for professional development that is either provided by the Consortium for regional educators or state or national conferences requested via the Local Investment Plans and approved by the CTE Directors and ODE.

Local	Regional	State and National
• Collaborative work time	Math or Writing-in- CTE	Program-oriented conferences that support approved POS or Perkins IV
• District or College- driven workshops & trainings that support Perkins IV	• Technical Skills Assessment Development	• Conferences that focus on programmatic or instructional needs
• Local PLCs focused on CTE POS	• Community of Practice workshops	• Statewide pathways or POS work
	• Pathway Groups	• OACTE
	• Industry Tours	• Student Success Conference
	• Program of Study Topics	

Quick Links

Oregon Performance Measurement definitions and other Data & Reports information:
http://www.oregon.gov/ode/learning-options/CTE/data/Pages/default.aspx

Oregon Teacher Licensure:
http://www.oregon.gov/ode/learning-options/CTE/resources/Pages/CTE-Teacher-Licensure.aspx

Oregon Programs of Study:
http://www.oregon.gov/ode/learning-options/CTE/resources/Pages/CTEPOS_Approval_Admin.aspx

CTE: Learning that Works for America (NASDCTEC): http://www.careertech.org/

OVAE: Office of Vocational and Adult Education:
http://www2.ed.gov/about/offices/list/ovae/index.html?exp=0

EDGAR: Education Department General Administrative Regulations & Other Applicable
Grant Regulations: http://www2.ed.gov/policy/fund/reg/edgarReg/edgar.html

National Research Center for Career & Technical Education: http://www.nrccte.org/

National Center for Education Statistics - CTE Statistics: http://nces.ed.gov/surveys/ctes

Glossary/Acronym Definitions

Advisory /Board/Committee: A board or committee which provides advice in the design, development, delivery, evaluation, and continuous improvement of Career and Technical Education programs. The committee meets on a regular basis and minutes are on file.

Articulation Agreement: A partnership between two institutions to recognize credits toward a degree.

Career Areas: Oregon's Career Areas provide an organizational framework for Program of Study curriculum design. The Skill Sets contained within each Career Area are industry reviewed and represent the knowledge and skills students need in order to be successful.

Career Pathways Fund: The Secondary Career Pathways Funding was established by the Oregon Legislature through HB 3072. It is intended that the funds allocated through this program will incentivize intensive CTE Programs of Study that lead to high wage and high demand occupations.

Crosswalk/Matrix: A template for instructors to use to identify which Oregon skill sets are included in the courses that are part of a program of study.

CTE POS: Career Technical Education Program of Study

CTE Program of Study:A collection of sequential courses that teach students skills and knowledge in a particular career area.

CTE: Career Technical Education

CTSO: Career Technical Student Organization

LEA: Local Education Agency

NCES/SCED course codes: Secondary School Course Classification System is published by the National Center for Education Statistics. NCES/SCED is based on a 5-digit Course Code that provides a basic structure for classifying course content. Additional SCED elements and attributes provide descriptive information about each course.

ODE: Oregon Department of Education

PACTEC: Portland Area Career Technical Education Consortium

PD: Professional Development

Perkins V: The newest legislative authorization of Perkins Career Technical Education funding that passed in congress and signed into law in 2018

Programs of Study: A curriculum of two or more courses that is intended or understood to lead to a degree, diploma, or certificate. It may include all or some of the courses required for completion of a degree program

Regional Coordinator: The Regional Coordinator of Career and Technical Education (CTE) works with local high schools and the community college to develop and coordinate the regional career and technical education plan including curriculum design, staff development, and resource allocation.

Regional High Demand, High Wage Occupations: Occupations paying more than the all-industry, all-ownership median wage for statewide or a particular area and have more than the median number of total (growth plus replacement) openings for statewide or a particular area.

TSA: Technical Skill Assessment (no longer required for a CTE Program of Study)

Work Based Learning (WBL): An educational strategy that provides students with real-life work experiences where they can apply academic and technical skills and develop their employability.

Appendix

PCC Fiscal Policies

Portland Community College (PCC) serves as PACTEC's fiscal agent, therefore, PACTEC is required to also abide by its fiscal policies and guidelines. Below are the detailed description of PCC's financial/fiscal policies for those that want or need to review them.

Advanced Payment and Cost Reimbursement
CG.40.201 – Fiscal Responsibilities of Contract and Grant Funded Programs

Effective date: November 12, 2003
Purpose
The following policy establishes the roles and responsibilities of management involved in contract and grant operations and Contract and Grant Accounting. Subsequent roles and responsibilities ensure awarded funds are accurately used and accounted for in the College's financial records according to all applicable laws, regulations, and policies.

Authority – laws, rules, regulations

PCC Board Policy B 508
Portland Community College's financial organization, management, and system of reporting will strive to ensure the integrity of institutional finances. The college will:
1. Establish appropriate internal controls to provide reasonable assurance of sound financial decision-making and protection of college assets and resources.
2. Maintain accounting systems that follow generally accepted accounting principles.
This executive rule was approved by executive management on November 12, 2003.

As required by 2 CFR 200.302, a separate fund is established within the Banner financial system for each grant or contract. All budget and financial transactions, including receipts, encumbrances, and expenditures, are reflected in the accounting records for each fund. The award file is maintained in the Contract and Grant Accounting office and is the college's official administrative record of the project. This file contains the required authorizations for account set up, award documents, copies of official administrative actions, technical and financial reports and close out materials. Award files are public records and are subject to audit.

2 CFR 200.303 "…(b) Comply with Federal statutes, regulations, and the terms and conditions of the Federal awards.(c) Evaluate and monitor the non-Federal entity's compliance with statutes, regulations and the terms and conditions of Federal awards."

Oregon State Archives OAR 166-450-0050 (15) Grant Records, Financial: Records document the expenditure data and status of federal and other grants received by the college. The records may include but are not limited to grant applications; project narratives; proposed budgets; notices of grant awards; project reviews; fund request; project reports; capital outlay expenditure reports; adjustment notices; contract; financial reports; performance reports; federal evaluations; allocation preparation reports; grant status summaries; reimbursement request; correspondence; and quarterly, annual and final expenditure reports. May also include grant related fixed-asset purchase, inventory, and disposal records. SEE ALSO: Grant Records, Administrative in the Administrative Records section. (Minimum retention: five years after final or annual expenditure report accepted; Fixed asset records: two years after disposition of assets).

2 CFR 200.333 Financial records, supporting documents, statistical records, and all other non-Federal entity records pertinent to a Federal award must be retained for a period of three years from the date of submission of the final expenditure report or, for Federal awards that are renewed quarterly or annually, from the date of the submission of the quarterly or annual financial report, respectively, as reported to the Federal awarding agency or pass-through entity in the case of a subrecipient.

Grant start up

The department's grant administrator has primary responsibility, both programmatic and fiscal, for complying with all terms and conditions of the grant. For this reason it is essential that the administrator obtain and become thoroughly familiar with all of the granting agency's written policies, procedures, and regulations. The grant administrator must also comply with all of the college's policies and administrative procedures.

For all grant administrators, but especially for those who have little experience in this field, Contract and Grant Accounting serves as a resource. Contract and Grant Accounting personnel can assist administrators in learning the most expeditious methods for fiscal action within the college system. It is the responsibility of the Contract and Grant Accounting staff to assist training grant administrators in fiscal procedures.

Upon receipt of a new award, the administrator shall immediately furnish to the Contract and Grant Accounting manager an original, fully executed award document that will be placed in the official files of the college.

When the original award document is received by Contract and Grant Accounting, a new fund number will be established, an accountant assigned, and a file folder created. The file will be the official college repository of all fiscal information pertaining to the grant. In addition to containing all the fiscal data generated during the grant period upon which fiscal reports are based, this file will also contain all written correspondence of a fiscal nature with the grant administrator and granting agency, as well as documentation of verbal communications. The grant file will be retained for the required number of years and must stand alone in the event of an audit. Consequently, any documentation that the grant administrator desires to be permanently retained should be transmitted to Contract and Grant Accounting.

The contract and grant accountant will contact the department administrator with the new fund number and set up a meeting to coordinate the PCC budget versus the award budget.

Budget

The administrator shall promptly submit to Contract and Grant Accounting a budget prepared in accordance with the approved budget contained in the grant award. Upon receiving the initial budget from the grant administrator, the contract and grant accountant will conduct a review to ensure that the budget agrees with the original proposal and verifies that the proper account numbers are implemented. The contract and grant accountant will input the budget into the college accounting system.

During the grant period, the administrator will review monthly Banner reports to ensure that all charged expenses are allowable in accordance with the grant's terms and the college's policies. If improper expenditures are detected or appropriate expenditures coded to an incorrect account, the administrator shall promptly follow CG.25.217 – Cost Transfers in the PCC Accounting Manual to reclassify the charge.

After the grant period has expired, the administrator shall continue to review Banner reports through the end of the fiscal year to ensure that no additional expenditures are charged to that grant. If any

expenses are found after the grant period, the contract and grant accountant is to be contacted as soon as possible for resolution.

Contract and Grant Accounting serves in a secondary review capacity to the grant administrator in monitoring the propriety of grant expenditures. Contract and Grant Accounting reviews these accounting records to detect obvious errors of account codes, improper personnel expenditures and expenditures in expired grants. Contract and Grant Accounting does not serve in an internal auditing capacity. Whenever apparent errors are detected the grant administrator is contacted for guidance or clarification.

If subsequent budget changes are received from the awarding agency, contract and grant staff will first ascertain that the administrator has obtained written permission from the granting agency to revise the budget. The budget change is then reviewed for mathematical accuracy. Upon verification, budget revisions will be entered by Contract and Grant Accounting staff into the college accounting system.

In the event that the grant administrator does not exercise primary responsibility for, and is not administering the grant in accordance with the granting agency's or the college's written policies, procedures, and regulations, the Accounting Services manager may take action to limit the college's potential liability.

New positions
The department administering the award must coordinate with Human Resources for hiring project staff. College policies must be followed in all hiring. Human Resources can give complete services in the areas of hiring procedures, personnel benefits, termination procedures, etc. Human Resources will assist in the recruitment, interviewing, and screening of applicants and other personnel-related activities. Important personnel guidelines can be found on the PCC HR website.

Administrative/professional and support staff positions subsidized by contracts and grants are classified by Human Resources upon submission of a job description in accordance with college policy. Compensation for positions established under contracts and grants shall be in accord with the established policy. Human Resources will assist departments by interpreting and furnishing guidelines for the administration of the compensation plans.

Making purchases
The college's Purchasing Department has the authority to purchase and/or lease supplies, equipment, and services. Purchasing or contracting made by any individual that is unauthorized or unallowable may incur a personal obligation to the signer. Contact the Purchasing Department for information and assistance with college purchasing policies and guidelines.

Approvals: levels of authority
Approvals – delegated authority
Approval authority levels have been established for purchase and budget transfer requests. The levels are level 10, level 20 and level 30. The higher the level, the higher the dollar limit of the purchase or budget transfer. Within each level, manager(s) have been identified as having authority to approve the document.
The electronic approval process automatically routes an invoice or direct pay through the appropriate queue for that department. Queue names for a department have been derived from the department's organization code.

Cost sharing or matching
If the grant requires any in-kind match or cost share the administrator shall maintain documentation for

this match or cost share; copies of the documentation shall be reported to Contract and Grant Accounting on a quarterly basis.

Program income

The grant administrator will contact Contract and Grant Accounting prior to receipt of additional non-federal funds to set up a separate account number to track any program income. Program income earned during the project period shall be retained by the recipient and, in accordance with Federal awarding agency regulations or the terms and conditions of the award, shall be used in one or more of the ways as listed in the 2 CFR 200.307:

- Deduction
  Ordinarily program income must be deducted from total allowable costs to determine the net allowable costs. Program income must be used for current costs unless the Federal awarding agency authorizes otherwise. Program income that the non-Federal entity did not anticipate at the time of the Federal award must be used to reduce the Federal award and non-Federal entity contributions rather than to increase the funds committed to the project.
- Addition
  With prior approval of the Federal awarding agency (except for IHEs and nonprofit research institutions, as described in paragraph (e) of 2 CFR 200.307) program income may be added to the Federal award by the Federal agency and the non-Federal entity. The program income must be used for the purposes and under the conditions of the Federal award.
- Cost sharing or matching
  With prior approval of the Federal awarding agency, program income may be used to meet the cost sharing or matching requirement of the Federal award. The amount of the Federal award remains the same.

Cash management

By making prior arrangements with Contract and Grant Accounting, on a timely basis, the administrator may exercise the right to review all interim fiscal reports prepared by Contract and Grant Accounting prior to their submission to the granting agency. For those grants that require the administrator's signature (in addition to that of a fiscal officer) on fiscal reports, the administrator shall be available to sign these on a timely basis. For those grants that require final programmatic and fiscal reports to be submitted together, the administrator shall contact Contract and Grant Accounting in a timely manner to coordinate the submission of the reports.

Contract and Grant Accounting prepares and submits all fiscal reports required by the granting agency based upon the accounting data contained in Banner expenditure reports. Contract and Grant Accounting also prepares any interim and final billings to the granting agency that are required for the college to obtain authorized grant funds and ensures that those funds are received.
Electronic requests for funds are made on a monthly basis by the contract and grant accountant to allow timely receipt of payments.

Monitoring subcontracts and audits

Personnel from both the department receiving the grant and Contract and Grant Accounting are responsible for managing and monitoring each project, program, subaward, function or activity supported by the award. Recipient department shall also monitor subawards to ensure subrecipients have met the audit requirements. They are expected to assure that performance goals are achieved, time schedules are met, appropriate levels of effort are expended, and that both programmatic and business management activities are conducted in a sound manner in accordance with the terms and conditions of the award. See IC.50.609 – Internal Review for additional information.

For the fiscal audit of a grant, Contract and Grant Accounting provides documentation to substantiate

expenditures claimed and works with the auditor and the grant administrator to resolve any questioned costs or adverse fiscal findings.

Retention
All awards should be reviewed for record retention requirements.
From the date of the last activity, standard retention is three years for direct Federal grant awards per 2 CFR 200.333 and five years for state or local awards as written in OAR 166-450-0050. If the awarding agency requires a special retention time, you must adhere to the award requirements.

Revised
May 25, 2017

Allowable Procedures
CG.25.210 – Disallowed, Questioned, or Over Expenditure Costs

Effective date: June 23, 2005

Purpose
To provide guidelines for the recovery process of any grant or contract monies expended for payment of disallowed, questioned costs, or over expenditures.

Authority – rules, laws, regulations

PCC Board Policy B 508
Portland Community College's financial organization, management, and system of reporting will strive to ensure the integrity of institutional finances. The college will:
1. Establish appropriate internal controls to provide reasonable assurance of sound financial decision-making and protection of college assets and resources.
2. Maintain accounting systems that follow generally accepted accounting principles.

This executive rule has been approved by executive management on June 6, 2005.

Costs
2 CFR 200.402-405 – the criteria of allowability of costs under these principles are:
- they must be reasonable. A cost is reasonable if, in its nature and amount, it does not exceed that which would be incurred by a prudent person under the circumstances prevailing at the time the decision was made to incur the cost;
- they must be allocable to sponsored agreements under the principles and methods provided herein;
- they must be given consistent treatment through application of those generally accepted accounting principles appropriate to the circumstances; and
- they must conform to any limitations or exclusions set forth in these principles or in the sponsored agreement as to types or amounts of cost items.

Disallowed costs
2 CFR 200.31 – charges to a Federal award that the Federal awarding agency or pass-through entity determines to be unallowable in accordance with the applicable Federal statutes, regulations, or the terms and conditions of the Federal award.

General guidelines
The Principal Investigator (PI) or Program Director (PD) is fiscally responsible for ensuring that all expenditures are allowable, allocable and reasonable and are in accordance with the regulations associated with the award agreement.

Upon determination of unallowable, questioned, or over expended funds, the responsible Contract and Grant Accountant will contact the PI/PD to determine the method of repayment.
Repayment of funds
The PI/PD in conjunction with the Contract and Grant Accountant may recover any monies expended for the payment of disallowed, questioned, or over expended funds in the following manner:
- Move charges to the PI/PD's general fund budget or to the next higher budget authority. Examples: director, division dean, campus president, or vice president.
- If it reaches the executive officer's level and there is not sufficient general fund budget to cover the charges, the campus president will refer it to the Portland Community College Cabinet for resolution (President's Cabinet).

Necessary, reasonable and allocable – Consistent – Adequate Documentation (Budget Narrative)

Revised
June 9, 2016

Managing Equipment
Purpose
- 101   Financial Services, Accounting Services is responsible to ensure the College's capital assets are accounted for and classified properly and accurately in the accounting records. This document establishes the College's capital asset reporting threshold.

Authority – Laws, Rules, Regulations

PCC Board Policy B 508

- 102 Establish appropriate internal controls to provide reasonable assurance of sound financial decision-making and protection of college assets and resources. Maintain accounting systems that follow generally accepted accounting principles.

- 103 GAAP establishes the guidelines for determining the capitalization of assets.

- 104 GASB Statement 34, paragraph 21, requires capital assets be depreciated over their estimated useful lives unless they are inexhaustible or are infrastructure assets reported using the modified approach.

- 105 This executive rule was approved by executive management on July 1, 2003. Thresholds .106 The College's capitalization threshold for assets is as follows: Thresholds

- 106 The College's capitalization threshold for asses is as follows:

Equipment & Machinery	$5,000
Buildings & Building Improvements	$50,000
Leasehold Improvements	$50,000
Land	No Threshold
Land Improvements	$50,000
Infrastructure	$50,000
Art & Historical Treasures	No Threshold
Library Collections	No Threshold

Non-Capital Assets

- 107 Property with a cost of less than the threshold amounts noted in .104 above, should not be capitalized. Non-capital assets are tangible or intangible property used in College operations having an initial cost (inclusive of ancillary charges) of less than the asset category threshold amount. Non-capital assets should be expensed in the period they are purchased.

- 108 The management of non-capital assets is governed by public stewardship, risk and internal control concerns. Non-capital assets such as computers and computer related assets are labeled with a property identification tag for tracking purposes and are physically inventoried periodically.

Capital Assets

- 109 Assets with a cost greater that the threshold amounts noted in .104 above will be capitalized and reported in the College's accounting records. Capital assets are major tangible or intangible assets that benefit the College more than a single fiscal year. Per GASB 34, Paragraph 18, capital assets, including infrastructure, should be reported at historical cost. The cost of a capital asset should include capitalized interest and ancillary charges necessary to place the asset into its intended location and use. Donated assets should be reported at their estimated fair value at the time of acquisition plus ancillary charges, if any.

- 110 The manager of Central Distribution Services ensures capital assets are properly controlled through the use of subsidiary property ledgers that are periodically reconciled to general ledger control accounts.

Conflict of Interest

All PCC faculty, staff, including student employees, and volunteers are defined as "public officials" per ORS Chapter 244, the Oregon Ethics Law and are subject to the following:

….

1. "Actual conflict of interest" means any action or any decision or recommendation by a public official acting in an official capacity that would result in a private financial benefit or an avoidance of a financial detriment by the public official or the public official's relative or any business with which the public official or a relative of the public official is associated.
2. "Potential conflict of interest" means any action or any decision or recommendation by a public official acting in an official capacity that could result in a private financial benefit or an avoidance of a financial detriment by the public official or the public official's relative or any business with which the public official or a relative of the public official is associated.
3. What to do when there is a conflict of interest:
   a. The public official should disclose such a (potential or actual) conflict of interest in writing to his/her supervisor.
   b. The supervisor needs to respond in writing and direct the public official as to how to address the conflict (e.g. recuse herself/himself from participating in any decision or influencing any decision on the matter at hand; or continue to participate, but subject to constraints or review.)

Competition and Micro Purchases

Mission

Through strategic sourcing, contract management, and other innovative solutions, Procurement & Contract Services, in collaboration with the rest of the Financial Services Team, strives to further the

mission and goals of the College by facilitating the procurement process, mitigating risk, and maximizing value in each transaction. We support access to quality education while advancing economic development and promoting sustainability in a collaborative culture of diversity, equity and inclusion.

Core Values
In alignment with the core values of the College: effective and ethical use of public funds, the dignity and worth of each individual, open and honest communication, teamwork and cooperation, and an environment that encourages the expression of original ideas and creative solutions; Procurement & Contract Services also places an emphasis on exceptional customer service, responsible stewardship, integrity, accountability, and professionalism.

Authority/Governance
The Public Contracting Code consists of three chapters in the Oregon Revised Statutes (ORS): ORS 279A (policy for all contracting activities), ORS 279B (procurements of goods and services), and ORS 279C (construction as well as architectural, engineering, photogrammetric mapping, transportation planning, land surveying services, and related services). The statutes contain the framework on which the PCC Community College Rules of Procurement expand. Procurement Procedures and further clarification is contained within the PCC College Procurement Manual.
- PCC Community College Rules of Procurement [PDF]

Note: The Oregon Department of Administrative Services (DAS), State Agencies, and the Oregon University System have exemptions and may have adopted rules that are significantly different than those adopted by Portland Community College. Please contact us if you need clarification or interpretation of any of our rules or processes.

Ethics
No employee or agent of the College shall use or attempt to use their official position to obtain financial gain or for avoidance of financial detriment for himself/herself, a relative, or for any business with which an employee, agent or a relative is associated. Acceptance of any gratuities, financial or otherwise, from any supplier of materials or services to the College by any member of the Procurement & Contract Services team is prohibited.

- PCC Ethics Guide

Contracting Requirements

Category	Informal		Formal
	Small Procurement	**Intermediate Procurement**	**Formal Procurement**
Goods & General Services Federally Funded Grant Purchases	< or = $10,000	>$10,000 and < or = $150,000	> $150,000
	Informal Quotes (Direct Award)	3 Written Quotes	Formal RFP/ITB
Personal Service	< or = $75,000	>$75,000 and < or = $150,000	> $150,000
	Informal Quotes (Direct Award)	3 Written Quotes	Formal RFP
Architect, Engineers and Related Services	< or = $100,000	>$100,000 and < or = $250,000	> $250,000
	Informal Quotes (Direct Award)	3 Written Quotes	Formal RFP
Public Improvement	< $5000	> or = $5000 and < or = $100,000	> $100,000
	Informal Quotes (Direct Award)	3 Written Quotes	Formal ITB

Travel Policy

Overnight travel program

Faculty and staff travel policy
- Area: Overnight travel
- Function: Faculty and staff travel policy
- Board policy: B 508
- Executive rule: TR.508
- Effective date: April 1, 2005
- Revised date: September 23, 2014

Purpose
- 101 – The Faculty and Staff travel policy provides guidelines and procedures for employees that travel overnight on behalf of Portland Community College. The purpose of the policy is to provide a method for the payment and reimbursement of expenditures incurred as a result of college travel, ensure that individuals traveling on college business neither gain nor lose personal funds as a result of college travel and to ensure compliance with federal and state regulations and college policy.

Authority – laws, rules, regulations

Federal regulations

26 CFR 1.274-5, substantiation requirements

Oregon statutes

Scope

The Americans with Disability Act (ADA)

Travel without an overnight stay

Combining personal travel with business travel

Dates of departure and return

Designated travel firm

Independent contractors, professional services contractors, or other non-PCC persons

Job applicant

Bargaining agreements

Student travel

International travel

Non-compliance and intentional falsification

Financing travel

Travel Authorization Form (TAF)

TAF and the purchase order

TAF and the procurement card

TAF expense report

TAF instructions

Cash advance

Internal Revenue Service (IRS) regulations

Use of personal funds

Overpayments

Fiscal year budgeting

Travel expenses paid by an outside entity

Reduction of expenses

Travel insurance
- 401 – Refer to Safety & Risk Management for specific insurance and coverage issues regarding lie and accidental injury, medical expense, loss of personal property, airfare and vehicle insurance relating to college travel.
- 402 – As part of the college's Business Travel Accident policy, travelers have access to a global emergency services program from Assist America. This program provides travelers with immediate access to doctors, hospitals, pharmacies, and certain other services when faced with a medical emergency while traveling 100 miles or more from permanent residence, or abroad. Contact the travel office for a brochure which contains a detachable insurance card for your wallet with emergency contact number and reference number.

Airfare
.501 – Travelers may secure airfare through:
- Internet fares, or
- Azumano

Azumano

Azumano refundable ticket (negotiated government fare)

Azumano non-refundable ticket

Azumano contact information and instructions

Transaction fee

Direct billing

Electronic ticket (e-ticket)

Discounted ticket (Internet fare)

Additional airfare information

Advance booking

Class of service

Private or corporate aircraft restrictions

Checking in

Itinerary changes

Lost itinerary

Lodging

Room accommodation

Advance reservation

Confirmation number

Check out receipt

Cancellation

Late arrival

No show

Traveling with a companion

Non-commercial lodging

Lodging reimbursement

Documentation requirements for lodging

Per diem – meal and incidental expense (M&IE)
- 701 – The traveler is reimbursed a per diem meal allowance based on federal per diem rates while traveling overnight on behalf of the college. The college uses the standard meal allowance method which provides an allowance for meal and incidental expense and reimburses the actual lodging expense. Per IRS regulations, a traveler may not alternate between the per diem allowance method and actual cost reimbursement. Therefore, the procurement card nor an actual cost reimbursement is allowed for personal meals in lieu of the per diem meal allowance.

- **Per diem meal allowance (M&IE) rates**

- **Time restrictions**

- **Meals during flight or meals provided at a conference or meeting**

- **Business meal**

- **Actual meal cost reimbursement and use of PCC purchasing card for meals**

- **Federal taxability**

- **Documentation requirements for meal expense**

Miscellaneous business expense
- 801 – Miscellaneous business expense includes parking fees, tolls, cab fares, fax, telephone charges, energy surcharges, laundry and other business related expenses.
- 802 – Miscellaneous business expense does not include meals, tips for meals or luggage handling type services. This type of expense is included in the Meal and Incidental Expense (M&IE) per diem reimbursement.

Snacks due to airport delay

Telephone calls

Tipping

Laundry and dry cleaning

Ground transportation

Vehicle rental

Airport bus or limousine vs. taxi

Use of personal vehicle

Mileage

Parking fees and tolls

Direct billing

Employee paid reservation

Driver requirements

Insurance

Accident

Traffic violation or citation

Mileage rate
Effective 1/1/2021
56 cents per mile

*Lodging – the college reimburses lodging at actual cost and does not use lodging per diem.

M&IE (per diem) rates – CONUS – travel within 48 continental United States
M&IE CONUS rates – (detailed CONUS instructions) effective 10/1/2018.
Quick steps: #1 find M&IE rate for city using link above, #2 use breakdown rates below.

M&IE CONUS breakdown				
Total	Breakfast	Lunch	Dinner	Incidental expense
$55 =	$13	$14	$23	$5
$56 =	$13	$15	$23	$5
$61 =	$14	$16	$26	$5
$66 =	$16	$17	$28	$5
$71 =	$17	$18	$31	$5
$76 =	$18	$19	$34	$5

Travel outside 48 contiguous states (OCONUS) – Alaska, Hawaii, Guam, and Puerto Rico
- M&IE OCONUS rates – (detailed OCONUS instructions)
- M&IE OCONUS breakdown

Foreign travel
- M&IE foreign rates – (detailed foreign instructions)
- M&IE foreign breakdown

Need a Travel Authorization Form (TAF)?
Check with your department admin or email stores@pcc.edu[OPENS IN NEW WINDOW].

Time and Effort Procedures
Standards for Documentation of Personnel Expenses
Effective date: January 22, 2007

Purpose
Sponsors of grants, contracts, and subcontracts require time and effort reporting to document that salary costs charged to funds accurately represent the amount of effort committed to the project.

Authority – laws, rules, regulations
PCC Board Policy B 508
Portland Community College's financial organization, management, and system of reporting will strive to ensure the integrity of institutional finances. The college will:
1. Establish appropriate internal controls to provide reasonable assurance of sound financial decision-making and protection of college assets and resources.
2. Maintain accounting systems that follow generally accepted accounting principles.

This executive rule has been approved by executive management on January 22, 2007.
2 CFR 200.430 states that charges to federal awards must be based on records that accurately reflect the work performed.

Definitions
Effort
The portion of time spent on grant funded, professional activities such as research, teaching, administration services, committee work, professional development, student advising, or other forms of service to the department, PCC and the community.

Effort reports are after-the-fact records that reflect how faculty and staff spent the time for which they were compensated by the educational institution certifying that the salary and benefits charged to a federal grant is accurate and is used to support such charges.

Proper time and effort reporting includes accounting for salary, wages, and benefits, and certifying actual time.

General guidelines

This executive rule pertains to all full-time and part-time employees who are in any way associated with sponsored projects, programs, services, contracts, or subcontracts.

All faculty or professional staff charged to multiple funding sources will complete a monthly or biweekly Labor Distribution Worksheet to be maintained on file in the department and subject to review. All other faculty or professional staff will be required to complete the Time and Effort Certification Report as stated below.

Procedure

- Salary allocations will be posted to the Banner system based on the anticipated time and effort allocation across funding streams.
- Monthly Labor Distribution Worksheets will be maintained to reflect an after the fact reporting of the percentage of the actual distribution of activity expended by employees covered by the system
- Reports will reasonably reflect the activities for which employees are compensated by the institution. To confirm that the distribution of activity represents a reasonable estimate of the work performed by the employee during the period, the reports will be signed by the employee, principal investigator, or responsible official(s) using suitable means of verification that the work was performed. Electronic signatures are allowable. Forms must be kept on file in the department for audit purposes.

Reconciliation

- Labor Distribution Worksheets should be reviewed quarterly in relation to the budgeted allocation.
- Actual time to estimates that exceed 5% may be reallocated to reflect the actual work performed.

Time and effort certification

Faculty or professional staff charged 100% to a single sponsored activity will complete a Time and Effort Certification Report every six months, accounting for 100% distribution of effort expended during the reporting period.

Effort Reporting Certification will be required of faculty, staff, and administrative personnel assigned to grant or contract activity during the course of a fiscal year. These forms will be distributed by Contract and Grant Accounting at appropriate intervals during the course of an academic year, but at least once per fiscal year. Personnel will certify the percentage of effort and/or time devoted to their respective projects by signing the Effort Reporting Certification, acquiring the appropriate authorizing signature, and returning the form to the Contract and Grant Accounting office.

Upon completion, copies of Time and Effort Certification forms will be filed with the official auditable grant file retained by Contract and Grant Accounting. These forms will only be released upon request by the federal sponsor of the specified funded project.

Revised
March 5, 2018

Region 2A Consortium Agreement
2022-2023

PURPOSE:

The Region 2A Consortium works together to support high schools in implementing and improving quality Career and Technical Education programs that provide training and education for high-skill, high demand, high-wage careers. The Consortium applies for Carl Perkins funding under "The Carl D. Perkins Career and Technical Education Act of 2006". This agreement confirms the Members' willingness to continue the Carl D. Perkins funding using this Consortium Agreement.

MEMBERSHIP:

The partners in the Region 2A Consortium, hereafter called **MEMBER(S),** are:

- Banks School District Forest Grove School District
- Gaston School District Scappoose School District
- Sherwood School District St. Helens School District
- Tigard-Tualatin School District Vernonia School District
- Portland Community College*

*represented by the Regional Coordinator
(Fiscal agent for the Consortium and non-voting Member)

TERM:

The Term of this Agreement is October 1, 2022, through September 30, 2023.

MEMBERSHIP STRUCTURE:

a. Voting Membership:
The principal or superintendent of each Member school will identify one person to serve as the Career & Technical Education Representative for each Member school (see attached roles and responsibilities). Other people from Members of the Consortium are encouraged to attend the meeting and provide input when appropriate; however, when a vote is necessary, the Members will be limited to a single vote per Member, except for the Region 2A Regional Coordinator, who is a non-voting Member. Votes will be limited to those present or designated proxies.

b. Chairperson/Consortium Manager:
Region 2a's Regional Coordinator will serve as Consortium Manager, will set meeting agendas, will chair all meetings, and will call special meetings when needed.

c. Quorum:
To have a quorum necessary to make decisions, at least 60% or five (5) of the nine (9) voting members of the Consortium must be present.

d. Majority Vote:
Decisions will be based on finding a mutually acceptable solution/group consensus whenever possible; however, it is agreed that if an issue must be determined by a vote, a simple majority of the votes possible for the number of members/proxies present will be binding on all parties.

e. Withdrawal:
Members desiring to withdraw from the consortium must notify the Oregon Department of Education (ODE) by February 1st of each year, prior to the annual allocation to the Consortium. Approval must be received from the Oregon Department of Education for the reconfiguration of the consortium

membership.

f. Removal/Changes in Governance:
Any planned removal of a Member for failure to follow the assurances which are contained in this document and any planned change in the rules of governance of this Consortium must be presented in writing for a first reading and discussion at a regular meeting or a special one called in compliance with the procedure outlined in this document. The Regional Coordinator will present the written copy of this plan/change to all CTE Representatives at least two weeks before the next meeting, at which time action may be taken on the measure. A simple majority of members/proxies of the quorum will be required to pass a removal or change in governance.

g. Assurances Requirement:
All decisions must comply with the assurances, standards, and guidelines set forth by the Federal Government pertaining to the Carl D. Perkins Career & Technical Education Act of 2006, ESSA of 2015, the Oregon Department of Education, and state and federal laws.

h. Meeting Dates:
Meeting dates will be prescheduled, and Members will be reminded of the meeting by email at least one week prior to the date. Should an emergency situation arise, a special meeting may be called by the Regional Coordinator.

i. Renewal:

This document must be reviewed and renewed by each Member annually.

j. New Members:

New Members will be added to this Consortium only when the CTE Members agree to allow another eligible school/district to become a Member. Approval must be received from the Oregon Department of Education for the reconfiguration of the consortium membership.

k. Fiscal Agent:
Portland Community College will serve as the fiscal agent, ensuring the budget and all monies spent by the Consortium conform to Perkins Section 135 "Allowable Fund Uses" and "State and Federal Assurances" from the Carl D. Perkins Career and Technical Education Act of 2006 Transition Plan 2009-2010."

All members agree to the following general Roles and Responsibilities:
- Attend a minimum of three (3) Consortium meetings per year, or designate an authorized proxy with decision-making authority to attend said meetings.
- Work with other Members and the Region 2A Regional Coordinator to establish and approve a yearly Consortium budget using the combined funds of the Members to best meet Consortium needs for each school site, meet the educational needs of local businesses and industry, and support innovative programs.
- Work with Members and colleagues to successfully evolve existing programs into Perkins IV defined Programs of Study (POS), with all CTE POS to be implemented by Fall 2022.
- Provide and share year-end accountability data on CTE performance towards benchmarks at each Member site, including student academic performance, progress toward POS, and program usage.
- Engage in self-evaluation as a part of the Consortium, utilizing collected data to engage in continuous program improvement to better meet state goals.
- Implement Improvement Plans as needed to meet performance deficiencies, if any.
- Assist the Regional Coordinator in completing and submitting required reports, including Annual Program Updates, Data Collection, and Annual Report.
- Provide a forum where all Members can access the latest change(s) in programs,

guidelines, and requirements from the State and Federal levels in order for the Consortium to establish and meet its required goals and objectives.
- Work with the Region 2A Regional Coordinator to ensure all applications from their region comply with the CTE Program Approval Process.
- Comply with the Federal, state, and local assurances described in the Certificate of Assurances.
- Assist with CTE Program Approval and CTE Teacher Certification issues within the Member school.
- Assist the Regional Coordinator in maintaining the required Carl Perkinsequipment inventory, if applicable.
- Participate in CTE Professional Development activities, if applicable.
- Promote CTE activities at Member sites.
- Regional Coordinator is allowed access to confidential and personally identifiable student data for implementing career and technical education programs within our districts.

CONSORTIUM MEMBER SIGNATURES

I have read this Agreement, including the attached Exhibits. I certify that I have the authority to sign and enter into this Agreement. I understand the Agreement and agree to be bound by its terms.

Banks School District
Signature of Administrator in Charge of CTE   11/2/2022

Brian Sica

Brian Sica   Superintendent
Name   **Title**

brians@banks.k12.or.us   503.324.8591

Email   **Phone**

Forest Grove School District
Signature of Administrator in Charge of CTE   11/4/2022

Dave Parker

Dave Parker   Superintendent
Name   **Title**

dparker@fgsd.k12.or.us   503-939-5910
Email   **Phone**

Gaston School District
Signature of Administrator in Charge of CTE   11/8/2022

Summer Catino

Summer Catino   Superintendent
Name   **Title**

scatino@pastonk12.org   503-577-5206
Email   **Phone**

Scappoose School District

Signature of Administrator in Charge of CTE   11/2/2022

Tim Porter

Tim Porter   Superintendent
Name   **Title**

tporter@scappoose.k12.or.us   971-200-8000
Email   **Phone**

Sherwood School District

Signature of Administrator in Charge of CTE   11/2/2022

Adam Mitchell

Adam Mitchell   Principal
Name   **Title**

amitchell@sherwood.k12.or.us   503-825-6003
Email   **Phone**

St. Helens School District

Signature of Administrator in Charge of CTE   11/10/2022

Katy Wagner

Katy Wagner   Principal
Name   **Title**

katyw@sthelens.k12.or.us   503-397-1900
Email   **Phone**

Tigard-Tualatin School District

Signature of Administrator in Charge of CTE   12/9/2022

Susan Rieke-Smith

Tim Porter   Superintendent
Name   **Title**

sriekesmith@ttsd.k12.or.us   503-431-4002
Email   **Phone**

Vernonia School District

Signature of Administrator in Charge of CTE   11/2/2022

Jim Helmen

Jim Helmen   Superintendent
Name   **Title**

jhelmen@vernoniak12.org   503-429-5891
Email   **Phone**

Portland Community College
Signature of Administrator in Charge of CTE   12/9/2022

Mary Dakin

Mary Dakin   Regional Coordinator
Name   **Title**

Mary.dakin@pcc.edu   971-722-7774
Email   **Phone**

Michael Mathews

Michael Mathews   Director of Procurement & Contracting
Name   **Title**

mike.mathews@pcc.edu   971-722-2831
Email   **Phone**