

Office of Educational Improvement & Innovation

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**Carl D. Perkins  
Career & Technical Education Improvement Act of 2006**

**2008-2013 LOCAL PLAN GUIDE**

Local or Consortium Basic Grant & Regional Reserve Fund

November 2007

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## ODE & CTE NETWORK INTERNAL DISCUSSION ONLY—Do NOT Distribute

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## INTRODUCTION

The Office of Educational Improvement & Innovation (EII) has developed this guide to assist eligible recipients in preparing their 2008-2013 local plan for the Carl D. Perkins Career and Technical Education Act of 2006 (P.L. 109-270) [<http://www.ode.state.or.us/search/page/?id=480>]. Section 134(a) of the Act requires each eligible recipient to prepare and submit a local plan to the Oregon Department of Education. Oregon has elected to request a 5-year plan for program years (PY) 2008-2013 which operates from July 1, 2008 – September 30, 2013. The 5-year local plan is due **June 30, 2008**.

The framework for the guide is based on the requirements of the Act, Oregon's State Perkins Plan and a renewed vision for Oregon's career and technical education (CTE) built on the development and implementation of CTE Programs of study. The Act's intent is for CTE students to achieve challenging academic and technical standards and be prepared for high-skill, high-wage, or high-demand occupations in current or emerging professions. The Act provides an increased focus on the academic achievement of career and technical education students, strengthens State and local accountability, and reinforces the connection between secondary and postsecondary education through CTE Programs of study.

ODE has established a set of statewide **benchmarks** with measurable **performance indicators** to guide the local investment of Perkins IV funds. The indicators establish performance targets ODE and CCWD desire all eligible recipients to attain by 2012-2013. Eligible recipients will want to assess their current performance against these performance indicators. Perkins-eligible program benchmark performance should guide the eligible recipient's yearly strategic focus and be used as a data source for the design of activities that lead toward meeting 2012-2013 performance. Eligible recipients are also asked to identify progress markers that documents progress toward meeting the performance indicators. Documented progress will be reported as part of each year's Perkins Annual Report.

This planning guide organizes the required Perkins elements into five **benchmarks**. The Oregon Perkins IV Benchmarks are:

1. Standards and content.
2. Alignment and articulation [*2008-2009 Reserve Fund Focus*];

3. Accountability and evaluation;=.
4. Professional development [*2008-2009 Reserve Fund Focus*]; and
5. Student Services.

Each of the five benchmarks must be addressed in the Local or Consortium Basic Grant 5-year plan submission. Benchmarks for Alignment & Articulation and Professional Development are the focus for the 2008-2009 Regional Reserve Fund submission and must be addressed. 2008-2009 Reserve Funds will be limited to funding activities supporting these two benchmarks. Annual reflection and analysis of local and consortium progress toward meeting all benchmarks will influence the identification of each year's focus for the use of the Reserve Fund.

Local or Consortium Basic Grant submissions will focus benchmark activities on local secondary and postsecondary component design for CTE Programs of study implementation. The Regional Reserve Fund submission will focus on consortium-wide activities that foster local implementation of CTE Programs of study.

The format for the Local or Consortium Basic Grant submission will be a narrative response for each of the benchmarks and their indicators. Because this submission is for the 2008-2013 period, your responses are expected to be more detailed for the 2008-2009 year than for the 2012-2013 year. Each subsequent year, an updated, more detailed local plan will be submitted that builds on the initial 5-year plan. The intent of this submission is to reflect a **single, 5-year plan**; not a collection of five, 1-year plans.

- For Consortium Basic Grant Plans ONLY, there is Question #6 requesting a required response describing how Perkins IV Consortium funds will be allocated among members of the Consortium and the rationale for such distribution.

### **Regional Reserve Fund Plan—limited to the 18 recognized regional consortia.**

There is a section requesting required responses describing how Perkins IV Regional Reserve Funds will be used to support the two 2008-2009 Reserve Fund benchmark focus areas of regional Alignment & Articulation and Professional Development. The format for the Regional Reserve Fund submission will also be a narrative response for each of the two, 2008-2009

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selected benchmarks. Because the Reserve Fund is intended to be a targeted, focused use of Perkins funds, the intended use of funds may be redirected from year to year. However, the focus will always be limited to the five

benchmarks. Unlike the Local or Consortium Basic Grant submissions, the Regional Reserve Fund submission should reflect a **1-year plan** that supports the 2008-2009 Local or Consortium Basic Grant activities.

<i>Tentative Timeline</i>	<b>Actions</b>
January 2008	ODE issues the 2008-2013 Local Plan Guide.
March 2008 – April 2008 ( <i>estimated</i> )	ODE calculates and publishes Perkins 2008-2009 Perkins IV allocations.
April 16, 2008	ODE/CCWD/OACTE Pre-conference workshop on 2008-2013 Perkins IV Local Plan development.
<b>June 30, 2008</b>	<b>Due date for submission of Perkins IV 2008-2013 Local or Consortium Basic Grant 5-year plan and the Regional Reserve Fund 1-year plan.</b>
July 1 – August 31, 2008	ODE reviews plans, including budget narrative, and interviews selected eligible recipients on their local plan and approves local 5-year plans. [Selected recipients = 2008-2009 allocation > \$100,000]
July 1, 2008	ODE begin issues 1 <sup>st</sup> installment of grant award funds (20%) for program year July 1, 2008 – September 30, 2009 to local sub-grantees via official Perkins sub-grant award notification <i>pending ODE approval of 2008-2013 local plan and ODE receipt of Perkins funds from U.S. Department of Education.</i>
October 1, 2008	Department issues supplemental (and final) installment of sub-grant award funds (80%) for program year one to local sub-grantees via official Perkins sub-grant award notification amendment <i>pending ODE approval of 2007-2008 local transition plan and ODE receipt of Perkins funds from U.S. Department of Education.</i>

### Submission Instructions

Complete local plans shall be submitted no later than close of business (5:00 pm PDT) on **June 30, 2008**. Plan narratives, including cover page, must be submitted electronically. A hard copy original of the signed Perkins Statement of Assurance must be mailed to the submission address below. The Perkins Statement of Assurance must be signed by the highest level administrator for the eligible recipient. If a single eligible recipient is submitting both a Basic Grant plan and a Reserve Fund plan, only one signed Perkins Statement of Assurance is required.

**For Consortium Basic Grant Submission ONLY:** Consortium Basic Grant submissions must include a completed Consortium Member Roster [Appendix C].

### Special Note

Guidance provided in this document is for the local plan only; not for the 2008-2009 Perkins budget narrative & spending workbook [BNSW]. The BNSW is a separate submission using ODE's online, web-application [<https://district.ode.state.or.us/>]. The local plan is to reflect the strategic, coherent plan for the local or regional implementation of Perkins IV intent. The local plan must indicate what annual activities will be implemented that leads toward meeting the 2012-2013 benchmarks. There may be duplication in the text describing the plan's activities and the budget narrative. This is expected and acceptable. There is an expectation for direct alignment of the plan's activities with the budgeted expenditures. This will require collaboration between the CTE program staff and the fiscal staff. The budget narrative describes in detail how the annual allocation will be invested in a way that supports the 5-year Basic Grant plan or the 1-year Reserve Fund plan. Budget narrative detail will be analyzed to determine if local spending complies with the Perkins statute and EDGAR regulation. The spending workbook portion of the BNSW submission is the official, sub-grant accounting document. The spending workbook is the accounting tool used by ODE's fiscal staff to monitor the spending of the local or regional Perkins sub-grant allocation.

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There will be a separate Perkins budget narrative & spending workbook submission for the Local or Consortium Basic Grant and a separate BNSW submission for the Regional Reserve Fund.

**Budget Narrative & Spending Workbook Due Date: June 30, 2008**

**Perkins IV and EDGAR Assurance**

All eligible recipient fiscal agents must submit a Perkins Statement of Assurance [Appendix B] signed by the eligible recipient’s highest level administrator. The signed, original assurance will be sent separately as a “hard copy” and must be received by the Oregon Department of Education by the due date for local plans to be considered complete. If a single fiscal agent is submitting both a Basic Grant plan and a Reserve Fund plan, only one signed Perkins Statement of Assurance is required.

**Submission Address**

**Jim Schoelkopf**

CTE and Perkins Administration  
Office of Educational Improvement & Innovation  
Oregon Department of Education  
255 Capitol Street NE  
Salem OR 97310

**Questions?**

**Plan Narrative:**

**Jim Schoelkopf**  
**503-947-5697**  
[jim.schoelkopf@state.or.us](mailto:jim.schoelkopf@state.or.us)

**Budget Narrative & Spending Workbook:**

**Barb O’Neill**  
**503-947-5787**  
[barbara.oneill@state.or.us](mailto:barbara.oneill@state.or.us)

**Publication Information**

The Department may publish your local plan, in whole or in part, on our Web site or through other means available to us. We look forward to reviewing your local plan and your initiatives to implement the new Act in the coming years. CTE Program Staff are available to answer questions that arise as you prepare your plan. Staff listing available at:

<http://www.ode.state.or.us/teachlearn/pte/stafflist.pdf>



## PERKINS IV REQUIRED ACTIVITIES FOR USE OF FUNDS 2007-2013

**“SEC. 135(b). REQUIRED LOCAL USES OF FUNDS**

**NOTE: Eligible recipients must first satisfy the required activities for uses of Perkins funds before any expenditure of funds are permitted for permissive activities [Sec. 135(c)]. The Sec. 135(b) required activities do not need to be exclusively satisfied through the use of Perkins funds. Some required activities may be accomplished through existing, general fund supported programs and policies; some required activities may be accomplished through support from other federal, state or local funding sources; or some required activities may require the use of Perkins funds as the sole funding source.**

*“(b) REQUIREMENTS FOR USES OF FUNDS.—Funds made available to eligible recipients under this part shall be used to support career and technical education programs that—*

***“(1) strengthen the academic and career and technical skills of students participating in career and technical education programs, by strengthening the academic and career and technical education components of such programs through the integration of academics with career and technical education programs through a coherent sequence of courses, such as career and technical programs of study described in section 122(c)(1)(A), to ensure learning in—***

- “(A) the core academic subjects (as defined in section 9101 of the Elementary and Secondary Education Act of 1965); and***
- “(B) career and technical education subjects;***

**Clarification:**

- CTE programs receiving Perkins funding support shall be **approved** CTE programs of study.
- Approved CTE Programs of study shall reflect an industry-endorsed, coherent and focused sequence of courses. (*Industry-endorsed = e.g. advisory committee endorsement, adoption of career cluster program of study plan.*)
- CTE subjects shall include technical knowledge and skill content from the Oregon Skill Sets or other recognized industry-based skills sets.
- CTE subjects shall include the integration of rigorous and relevant academic content that instructs the application of the academic content in a technical context.
- Should an eligible recipient fail to meet 90% of one of the Perkins performance measures, the recipient shall—
  - ✓ In the first year of failing to meet one of the performance measures, implement an improvement plan to specifically address the performance deficiency;
  - ✓ If the same performance deficiency continues for a second year, update and continue the improvement plan and direct Perkins funds toward addressing the performance deficiency; and
  - ✓ If the same performance deficiency continues for the third year, update and continue the improvement plan and the Oregon Department of Education will direct activities and local Perkins funding until the performance deficiency is corrected.

***“(2) link career and technical education at the secondary level and career and technical education at the postsecondary level, including by offering the relevant elements of not less than 1 career and technical program of study described in section 122(c)(1)(A);***

**Clarification:**

- Oregon high schools and community colleges with Perkins III approved CTE programs shall transition those programs to Perkins IV-eligible CTE Programs of study by September 2012 for those Programs of study to remain eligible for Perkins support. Eligible recipients must have at least one CTE program of study implemented by September 2008.
- CTE Programs of study shall operate under the authority of an institutional articulation agreement.
- Approved CTE Programs of study shall explicitly identify (1) how the secondary CTE program aligns or articulates to a postsecondary CTE program in the same program of study in a nonduplicative way; and (2) what opportunities are provided a student to earn and transcript dual or concurrent credit.

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***“(3) provide students with strong experience in and understanding of all aspects of an industry, which may include work based learning experiences;***

**Clarification:**

- Approved CTE Programs of study shall provide the student with instruction beyond occupationally-specific skill attainment to include how specific careers fits into the larger system of an industry.

***“(4) develop, improve, or expand the use of technology in career and technical education, which may include—***

***“(A) training of career and technical education teachers, faculty, and administrators to use technology, which may include distance learning;***

***“(B) providing career and technical education students with the academic and career and technical skills (including the mathematics and science knowledge that provides a strong basis for such skills) that lead to entry into the technology fields; or***

***“(C) encouraging schools to collaborate with technology industries to offer voluntary internships and mentoring programs, including programs that improve the mathematics and science knowledge of students;***

**Clarification:**

- Instructional practice shall, to the extent practicable, use and model program-related technology for the application of skills appropriate to the CTE program of study (*e.g. access to relevant technology that is practical for the capacity of the local secondary or postsecondary component of the CTE program of study*).
- Equipment, software and instructional material shall explicitly contribute to student academic, with specific attention to mathematics and science, and technical skill attainment.
- Equipment, software and instructional material purchases shall be limited to approved CTE Programs of study that lead to high wage, high demand occupations in current or emerging careers.
- Costs for distance education shall be limited to program or connectivity costs; not student-related enrollment costs or fees.

***“(5) provide professional development programs that are consistent with section 122 to secondary and postsecondary teachers, faculty, administrators, and career guidance and academic counselors who are involved in integrated career and technical education programs, including—***

***“(A) in-service and preservice training on—***

***“(i) effective integration and use of challenging academic and career and technical education provided jointly with academic teachers to the extent practicable;***

***“(ii) effective teaching skills based on research that includes promising practices;***

***“(iii) effective practices to improve parental and community involvement; and***

***“(iv) effective use of scientifically based research and data to improve instruction;***

***“(B) support of education programs for teachers of career and technical education in public schools and other public school personnel who are involved in the direct delivery of educational services to career and technical education students, to ensure that such teachers and personnel stay current with all aspects of an industry;***

***“(C) internship programs that provide relevant business experience; and***

***“(D) programs designed to train teachers specifically in the effective use and application of technology to improve instruction;***

**Clarification:**

- Each licensed, CTE endorsed secondary teacher and each postsecondary faculty member in an approved CTE program of study shall have a professional development plan that is consistent with the policies of the eligible recipient and meets the criteria of (5) above.
- Professional development activities shall be consistent with the definition of professional development as described in the Perkins Act and be sustained, intensive, reinforced over time and focused on instruction.
- Professional development activities shall explicitly contribute to the improvement of instructional practices that lead to improved academic and technical skill attainment of CTE students.
- CTE professional organization conference and student leadership conference attendance may meet the required professional development activity criteria as long as the conference attendance is an integral and relevant part of a teacher’s professional development plan.

***“(6) develop and implement evaluations of the career and technical education programs carried out with funds under this title;***

**Clarification:**

- The secondary CTE program of study renewal process will be used as a tool for secondary-postsecondary CTE program of study evaluation.
- Secondary CTE program evaluations will be included in the ODE Continuous Improvement Process (CIP).
- Postsecondary CTE program evaluations shall be part of the college’s internal evaluation and accreditation processes.

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***“(7) initiate, improve, expand, and modernize quality career and technical education programs, including relevant technology;***

Clarification:

- Relevant technology, equipment and related instructional material and supply purchases are eligible expenditures as long as there is a direct and explicit connection between the purchase of such items and increasing student academic knowledge and technical skill attainment in the CTE program of study.
- Use secondary CTE program renewal process to identify areas for secondary-postsecondary CTE program of study improvement.

***“(8) provide services and activities that are of sufficient size, scope, and quality to be effective; and***

Clarification:

- Approved CTE Programs of study meet the criteria of “sufficient size, scope, and quality to be effective” by having completed the secondary or postsecondary quality assurance process.

***“(9) provide activities to prepare special populations, including single parents and displaced homemakers who are enrolled in career and technical education programs, for high skill, high wage, or high demand occupations that will lead to self-sufficiency.***

Clarification:

- Analyze disaggregated CTE student performance to identify and design activities that support special populations in meeting Perkins performance measures.
- Review special population student pre-requisite—**not** remedial—requirements that equip students with the readiness skills to be successful in a CTE program of study.
- Remedial or CTE pre-enrollment developmental education activities are **not** eligible activities for the use of Perkins funds. Funding support of prerequisite courses required for entry into a CTE program of study may be an eligible activity.
- Student support services for special population students and individuals with disabilities enrolled in a CTE program of study is a required activity for the use of Perkins funds.

Additional clarification:

### **Administrative Costs**

Each eligible recipient receiving funds shall not use more than 5 percent of the funds for administrative costs.

### **Career and Technical Student Organizations**

Funds may be used for the development and acquisition of instructional materials, supplies, and equipment needed to support a student organization *as an integral part of career and technical education instruction*. Qualified career and technical educators must supervise the instruction that relates to the student organization.

The following do **not** represent *an integral part of the career and technical instruction* and are not eligible for Perkins support:

- Lodging, food, conveying or furnishing transportation to conventions or other gatherings of CTSO students;
- Purchase of supplies, jackets and other effects for students' personal ownership or use;
- Cost of non-instructional activities such as athletic, social or recreational events;
- Printing and disseminating of non-instructional materials;
- Purchase of awards for recognition of students, advisors or other individuals; or
- Payment of membership dues.

# LOCAL or CONSORTIUM BASIC GRANT PLAN

Eligible Perkins recipients must prepare and submit to the Oregon Department of Education a 5-year plan describing local operation of Perkins-eligible CTE Programs CTE Program of study if 2008-2009 Perkins funds are desired [Sec. 134(a)]. The submission format will be a narrative description of the strategic activities planned for each benchmark performance indicators. The plan must describe activities for each year of the Act’s 2008-2013 authorization. Your responses will contain greater detail for the 2008-2009 program year than for succeeding years. However, there is an expectation and requirement you submit a plan reflecting coherent 5-year planning that leads toward meeting the 2012-2013 performance indicators. Additional detail on the intent and expectation of Perkins IV can be found in Oregon’s 5-year plan [<http://www.ode.state.or.us/search/results/?id=151>] and Perkins IV Taskforce recommendations [<http://www.ode.state.or.us/search/page/?id=480>].

## 1. Standards & Content

Standards and content are core elements for Perkins-eligible programs of study and include:

- Relevant, rigorous standards-based content aligned with challenging academic standards;
- Shared secondary and postsecondary technical content which incorporates the knowledge and skills identified in the Oregon Skill Sets, which are validated through national and state employer input;
- Systemic approach to CTE using industry-based academic and technical knowledge and skills where student performance is demonstrated through valid and reliable assessments aligned to industry standards; and
- Assure secondary and postsecondary students are prepared for high demand and high wage careers and occupations that are responsive to regional, state or global employment trends.

**By 2012-2013:**

- a. **100% of Perkins-eligible programs of study align with Oregon Skill Sets [<http://www.ode.state.or.us/search/results/?id=271>] or other industry-based standards;**
- b. **95% of Perkins-eligible programs of study use relevant technology;**

Please respond with an explicit description of activities to be planned and implemented that will lead toward the attainment of each indicator for this benchmark. Describe what evidence or documentation [progress markers] you will gather to indicate progress toward meeting the 2012-2013 level.

	Activities	Progress Markers
2008-2009	a. b.	a. b.
2009-2010	a. b.	a. b.
2010-2011	a. b.	a. b.
2011-2012	a. b.	a. b.
2012-2013	a. b.	a. b.

## 2. Alignment & Articulation

Alignment and articulation are core elements for Perkins-eligible programs of study and include:

1. An expectation that the elements defined in the Perkins Act will ensure a greater depth and breadth of student learning through the alignment and integration of challenging academic and technical standards in curriculum, instruction and assessment. [Sec. 122(c)(1) & Sec. 134(b)(3)]
2. A unified, cohesive sequence of content among secondary and postsecondary partners; a nonduplicative sequence of courses or learning experiences; students receive credit for prior learning whenever possible.
3. Alignment of content between secondary and postsecondary education may include course articulation or other ways to acquire postsecondary education credits (e.g. Oregon’s credit for proficiency, dual credit).
4. Articulation agreements are developed, implemented and supported at the institutional level to ensure long-term sustainability and cross-sector cooperation.

### **By 2012-2013:**

- a. **100% of Perkins-eligible programs of study operate with signed institutional agreements—either alignment or articulation;**
- b. **67% of Perkins-eligible programs of study have credit articulation agreements for courses that are required in the CTE Program of Study certificate or degree;**
- c. **100% of Perkins-eligible programs of study lead to an industry-recognized, postsecondary credential or degree in a high wage, high demand occupation based on regional or state labor market information [<http://www.qualityinfo.org/olmisj/PubReader?itemid=00005527>].**

Please respond with an explicit description of activities to be planned and implemented that will lead toward the attainment of each indicator for this benchmark. Describe what evidence or documentation [progress markers] you will gather to indicate progress toward meeting the 2012-2013 level. Also **submit a CTE Program of Study template** or other visual program of study organizer as documentation of CTE programs of study implemented for 2008-2009. [See Appendix D for a CTE Program of Study template example]. The submitted version of the CTE program of study template **must** be signed by both the appropriate high school and postsecondary administrator. Each year, CTE Program of Study templates will be requested as new programs of study are implemented.

	Activities	Progress Markers
2008-2009	a. b. c.	a. b. c.
2009-2010	a. b. c.	a. b. c.
2010-2011	a. b. c.	a. b. c.
2011-2012	a. b. c.	a. b. c.
2012-2013	a. b. c.	a. b. c.

3. Accountability & Evaluation

***By 2012-2013:***

- a. **55% of CTE concentrators meet or exceed “Gold Level” for technical skill measurement [“Gold Level” = External, third-party assessment of technical skills meeting state-approved, industry-recognized standards];**
- b. **45% of CTE concentrators meet or exceed “Silver Level” for technical skill measurement [Silver Level” = Locally-developed assessment of state-approved, industry-recognized standards meeting state-established validity and reliability guidelines];**
- c. **No more than 5% of secondary CTE concentrators require postsecondary remediation;**
- d. **100% of Perkins-eligible programs of study meet state-approved levels of performance on Perkins IV core indicators of performance [Sec 113(b)].**

Please respond with an explicit description of activities to be planned and implemented that will lead toward the attainment of each indicator for this benchmark. **Specifically identify, by name,** the “Gold Level” or “Silver Level” assessment used to measure technical skill attainment. Assessment identification shall indicate if the assessment is regionally developed using state-approved guidelines or 3<sup>rd</sup>-party, vendor developed. Also describe if the assessments are “paper-pencil”, performance-based, or a combination. Describe what evidence or documentation [progress markers] you will gather to indicate progress toward meeting the 2012-2013 level.

	Activities	Progress Markers
2008-2009	a. b. c. d.	a. b. c. d.
2009-2010	a. b. c. d.	a. b. c. d.
2010-2011	a. b. c. d.	a. b. c. d.
2011-2012	a. b. c. d.	a. b. c. d.
2012-2013	a. b. c. d.	a. b. c. d.

In addition to the benchmark indicators for Accountability & Evaluation, each eligible recipient’s CTE student and program performance will be measured against a set of Perkins-required performance measures. For the 5-year Perkins authorization, ODE will be collecting data and reporting performance for the measures listed below. Perkins performance data will be reported using the following student definitions.

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**A. Secondary**

<p><u>Participant</u> – Any secondary student who has earned one-half (.5) or more credits in any technical skill course as part of an Oregon state-approved CTE program. <i>[Oregon approved CTE program = 2 credits or more]</i></p>
<p><u>Concentrator</u> – Any secondary student who has earned one (1) or more credits in a technical skill course(s) as part of an Oregon state-approved CTE program, of which at least one-half (.5) credit must be designated as a “required” CTE course for program completion. <i>[Oregon approved CTE program = 2 credits or more]</i></p>

**B. Postsecondary**

<p><u>Participant</u> – A postsecondary student who has earned one (1) or more CTE credits in any CTE program area within the reporting year. <i>[CTE credit = ACTI code 21 or 23]</i></p>
<p><u>Concentrator</u> – A postsecondary student who is enrolled for credit in the current academic year who: (1) has completed 18 or more program credits, of which 9 credits are CTE, within a single CTE program area that terminates in the award of a degree, a certificate of completion or an industry-recognized credential; or (2) completes a short-term CTE program of between 12 - 17 credits that terminates in the award of a certificate of completion or an industry-recognized credential.</p>

Secondary Measures	Postsecondary Measures
1S1 Academic Attainment – Reading/Language Arts	1P1 Technical Skill Attainment
1S2 Academic Attainment – Mathematics	1P2 Academic Attainment [Oregon Only]
1S3 Academic Attainment – Writing [Oregon Only]	2P1 Credential, Certificate, or Degree Completion
2S1 Technical Skill Attainment	3P1 Student Retention in Postsecondary Education and Transfer to a Baccalaureate Degree Program
3S1 Secondary School Completion	4P1 Student Placement
4S1 Student Graduation Rates	5P1 Employment Retention
5S1 Secondary Placement	6P1 Nontraditional Participation
6S1 Nontraditional Participation	6P2 Nontraditional Completion
6S2 Nontraditional Completion	

Annual performance will be posted on the ODE web site at: <http://www.ode.state.or.us/data/stats/opte/default.aspx>

**4. Professional Development**

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Professional development intent and design must [Sec. 122(c)(2) & Sec. 135(b)(4)]:

- promote the integration of coherent and rigorous academic content standards and CTE curricula, including through opportunities for the appropriate academic and CTE teachers to jointly develop and implement curricula and pedagogical strategies;
- be high quality, sustained, intensive, and focused on instruction, and increases the academic knowledge and understanding of industry standards;
- encourage applied learning that contributes to the academic and CTE knowledge of the student;
- provide the knowledge and skills needed to work with and improve instruction for special populations; and
- assist in accessing and utilizing CTE accountability data, student achievement data, and data from assessments.

**SPECIAL NOTE:** Annually, eligible recipients are required to invest an amount equal to 10% of their Perkins Basic Grant allocation specifically for professional development. Professional development financial support does not require the use of Perkins funds, but can be from other local funds as long as the professional development investment is equal to 10% of the local Perkins Basic Grant allocation. The professional development investment can be a combination of Perkins and other local funds. Please explicitly indicate in your plan activities and budget narrative the source of professional development funds equal to 10% of the local Perkins Basic Grant allocation. **Perkins Reserve Funds can not supplant the Perkins Basic Grant professional development funding requirement.**

**By 2012-2013:**

- a. 95% of CTE teachers reinforce naturally occurring, embedded academic content within their technical instruction;**
- b. 95% of secondary CTE teachers follow a formal, professional development plan focused on instruction; and 95% of postsecondary CTE teachers participate annually in formal, program-related professional development focused on instruction.**

Please respond with an explicit description of activities to be planned and implemented that will lead toward the attainment of each indicator for this benchmark. Describe what evidence or documentation [progress markers] you will gather to indicate progress toward meeting the 2012-2013 level.

	Activities	Progress Markers
<b>2008-2009</b>	a. b.	a. b.
<b>2009-2010</b>	a. b.	a. b.
<b>2010-2011</b>	a. b.	a. b.
<b>2011-2012</b>	a. b.	a. b.
<b>2012-2013</b>	a. b.	a. b.

**5. Student Services**

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Student services are a core element for Perkins-eligible programs of study and include:

- All CTE students will have informational, career guidance, academic advising and instructional support to assist them in progressing through a CTE program of study in an efficient and seamless manner (e.g. Pathway Templates, Education Plan and Profile, appropriate accommodations, ELL services).

***By 2012-2013:***

- a. **95% of Perkins-eligible programs of study provide students with relevant career-related learning experiences, student leadership opportunities [secondary], cooperative work experience [postsecondary] and access to educational opportunities for careers that are nontraditional for a student's gender;**
- b. **100% of Perkins-eligible programs of study provide each student with appropriate accommodations and barrier-free access to CTE learning environments for high wage, high demand careers that lead to self-sufficiency.**

Please respond with an explicit description of activities to be planned and implemented that will lead toward the attainment of each indicator for this benchmark. Describe what evidence or documentation [progress markers] you will gather to indicate progress toward meeting the 2012-2013 level.

	Activities	Progress Markers
2008-2009	a. b.	a. b.
2009-2010	a. b.	a. b.
2010-2011	a. b.	a. b.
2011-2012	a. b.	a. b.
2012-2013	a. b.	a. b.

**6. Distribution of Perkins IV Consortium Funds *[Required for Consortium Basic Grant Plans ONLY]***

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(2) FUNDS TO CONSORTIUM – Funds allocated to a consortium formed to meet Perkins IV requirements shall be used only for the purposes and programs that are mutually beneficial to all members of the consortium and can be used only for programs authorized. Such funds may not be reallocated to individual members of the consortium for purposes or programs benefiting only 1 member of the consortium. [PL 109-270, Sec. 131(f)(2)]

**Describe how the regional eligible recipient for the consortium will distribute Perkins IV funds for career and technical education programs among the members of the consortia, including the rationale for such allocation.**

	Description of How Consortium Funds are Distributed to Members	Rational for Regional Distribution of Consortium Funds to Members
2008-2009		
2009-2010		
2010-2011		
2011-2012		
2012-2013		

# REGIONAL RESERVE FUND PLAN

Eligible recipients for the Perkins Regional Reserve Fund [the 18 ODE-recognized regional consortia] must prepare and submit to the Oregon Department of Education a 1-year Reserve Fund plan describing regional consortia support of Perkins-eligible CTE programs of study if 2008-2009 Perkins Reserve Funds are desired [Sec. 134(a)]. The submission format will be a description of the strategic activities planned for each of the two benchmark performance indicators. There is an expectation and a requirement you submit a plan that reflects coherent planning that leads toward meeting the 2012-2013 performance indicators. Additional detail on the intent and expectation of Perkins IV can be found in Oregon’s 5-year plan [<http://www.ode.state.or.us/search/results?id=151>] and Perkins IV Taskforce recommendations [<http://www.ode.state.or.us/search/page?id=480>].

## R1. Regional Alignment & Articulation

Alignment and articulation are core elements for Perkins-eligible programs of study and include:

- An expectation that the elements defined in the Perkins Act will ensure a greater depth and breadth of student learning through the alignment and integration of challenging academic and technical standards in curriculum, instruction and assessment. [Sec. 122(c)(1) & Sec. 134(b)(3)]
- A unified, cohesive sequence of content among secondary and postsecondary partners; a nonduplicative sequence of courses or learning experiences; students receive credit for prior learning whenever possible.
- Alignment of content between secondary and postsecondary education may include course articulation or other ways to acquire postsecondary education credits (e.g. Oregon’s credit for proficiency, dual credit).
- Articulation agreements are developed, implemented and supported at the institutional level to ensure long-term sustainability and cross-sector cooperation.

### **By 2012-2013:**

- a. 100% of Perkins-eligible programs of study operate with signed institutional agreements—either alignment or articulation;**
- b. 67% of Perkins-eligible programs of study have credit articulation agreements for courses that are required in the CTE Program of Study certificate or degree;**
- c. 100% of Perkins-eligible programs of study lead to an industry-recognized, postsecondary credential or degree in a high wage, high demand occupation based on regional or state labor market information [<http://www.qualityinfo.org/olmisj/PubReader?itemid=00005527>].**

Please respond with an explicit description of activities to be planned and implemented that will lead toward the attainment of each indicator for this benchmark. Describe what evidence or documentation [progress markers] you will gather to indicate progress toward meeting the 2012-2013 level. Also **submit a CTE Program of Study template** or other visual program of study organizer as documentation of CTE programs of study implemented for 2008-2009. If a single eligible recipient is submitting both a Basic Grant plan and a Reserve Fund plan, only a single copy of each CTE Program of Study template is required. [See Appendix D for a CTE Program of Study template example]. Each year, CTE Program of Study templates will be requested as new programs of study are implemented.

	Activities	Progress Markers
2008-2009	a. b. c.	a. b. c.

**R2. Regional Professional Development**

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Professional development intent and design must [Sec. 122(c)(2) & Sec. 135(b)(4)]:

- promote the integration of coherent and rigorous academic content standards and CTE curricula, including through opportunities for the appropriate academic and CTE teachers to jointly develop and implement curricula and pedagogical strategies;
- be high quality, sustained, intensive, and focused on instruction, and increases the academic knowledge and understanding of industry standards;
- encourage applied learning that contributes to the academic and CTE knowledge of the student;
- provide the knowledge and skills needed to work with and improve instruction for special populations; and
- assist in accessing and utilizing CTE accountability data, student achievement data, and data from assessments.

**SPECIAL NOTE:** Annually, eligible recipients are required to invest an amount equal to 15% of their Perkins Regional Reserve Fund allocation specifically for professional development. Professional development financial support does not require the use of Perkins funds, but can be from other local funds as long as the professional development investment is equal to 15% of the Region’s Reserve Fund allocation. The professional development investment can be a combination of Perkins and other local funds. Please explicitly indicate in your plan activities and budget narrative the source of professional development funds equal to 15% of the Region’s Reserve Fund allocation. **Perkins Basic Grant funds can not supplant the Perkins Regional Reserve Fund professional development funding requirement.**

**By 2012-2013:**

- a. 95% of CTE teachers reinforce naturally occurring, embedded academic content within their technical instruction;**
- b. 95% of secondary CTE teachers follow a formal, professional development plan focused on instruction; and 95% of postsecondary CTE teachers participate annually in formal, program-related professional development focused on instruction.**

Please respond with an explicit description of activities to be planned and implemented that will lead toward the attainment of each indicator for this benchmark. Describe what evidence or documentation [progress markers] you will gather to indicate progress toward meeting the 2012-2013 level.

	Activities	Progress Markers
2008-2009	a. b.	a. b.

APPENDIX A**Perkins IV 2012-2013 Benchmarks***[Required for Perkins-eligibility and CTE Programs of Study]*

ODE has established a set of statewide **benchmarks** with measurable **performance indicators** to guide the local investment of Perkins funds. The indicators establish performance targets ODE and CCWD desire all eligible recipients to attain by 2012-2013. Eligible recipients will want to assess their current performance against these performance indicators. Perkins-eligible program benchmark performance should guide the eligible recipient's yearly strategic focus and be used as a data source for the design of activities that lead toward meeting 2012-2013 performance. Eligible recipients are also asked to identify progress markers that documents progress toward meeting the performance indicators. Documented progress will be reported as part of each year's Perkins Annual Report.

**1. Standards & Content**

- a. 100% of Perkins-eligible programs of study align with Oregon Skill Sets [<http://www.ode.state.or.us/search/results/?id=271>] or other industry-based standards;
- b. 95% of Perkins-eligible programs of study use relevant technology;

**2. Alignment & Articulation**

- a. 100% of Perkins-eligible programs of study operate with signed institutional agreements—either alignment or articulation;
- b. 67% of Perkins-eligible programs of study have credit articulation agreements for courses that are required in the CTE Program of Study certificate or degree;
- c. 100% of Perkins-eligible programs of study lead to an industry-recognized, postsecondary credential or degree in a high wage, high demand occupation based on regional or state labor market information [<http://www.qualityinfo.org/olmisj/PubReader?itemid=00005527>].

**3. Accountability & Evaluation**

- a. 55% of CTE concentrators meet or exceed “Gold Level” for technical skill measurement [*“Gold Level” = External, third-party assessment of technical skills meeting state-approved, industry-recognized standards*];
- b. 45% of CTE concentrators meet or exceed “Silver Level” for technical skill measurement [*“Silver Level” = Locally-developed assessment of state-approved, industry-recognized standards meeting state-established validity and reliability guidelines*];
- c. No more than 5% of secondary CTE concentrators require postsecondary remediation;
- d. 100% of Perkins-eligible programs of study meet state-approved levels of performance on Perkins IV core indicators of performance [Sec 113(b)].

**4. Professional Development**

- a. 95% of CTE teachers reinforce naturally occurring, embedded academic content within their technical instruction;
- b. 95% of secondary CTE teachers follow a formal, professional development plan focused on instruction; and 95% of postsecondary CTE teachers participate annually in formal, program-related professional development focused on instruction.

**5. Student Services**

- a. 95% of Perkins-eligible programs of study provide students with relevant career-related learning experiences, student leadership opportunities [secondary], cooperative work experience [postsecondary] and access to educational opportunities for careers that are nontraditional for a student's gender;
- b. 100% of Perkins-eligible programs of study provide each student with appropriate accommodations and barrier-free access to CTE learning environments for high wage, high demand careers that lead to self-sufficiency.

APPENDIX B

**CARL D. PERKINS CAREER AND TECHNICAL EDUCATION ACT OF 2006  
STATEMENT OF ASSURANCES**

Assurances form a binding agreement between the eligible recipient fiscal agent, the Oregon Department of Education, and the U.S. Department of Education that assures all legal requirements are met in accordance with state and federal laws, regulations, and rules. These assurances apply to **program activities** and **expenditures of funds**. Compliance to general and specific program assurances is the legal responsibility of the eligible recipient under the authorization of the local board of education.

The Eligible Recipient Fiscal Agent certifies the following statements:

1. The Fiscal Agent understands and will comply with the provisions, regulations and rules of the Carl D. Perkins Career and Technical Education Act of 2006.
2. The Fiscal Agent will use federal funds to supplement the eligible recipient's CTE programs of study and will not use federal funds to supplant existing funds or reduce general or other funds.
3. The Fiscal Agent will provide, on request, complete and accurate data as required.
4. The Fiscal Agent understands and will comply with all applicable assurances for Federal Grant Funds. Note: These assurances can be found on the Oregon Department of Education website at:

<http://www.ode.state.or.us/teachlearn/pte/perkinsassurances.pdf>

**Eligible Recipient Address:**

*(Fiscal Agent Name and Mailing Address):*

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

\_\_\_\_\_, OR \_\_\_\_\_

Telephone: \_\_\_\_\_ Ext. \_\_\_\_\_

County: \_\_\_\_\_

**Authorized Representative:**

\_\_\_\_\_  
Name

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Date Signed

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APPENDIX D

CTE Program of Study Template

*SAMPLE provided for illustration ONLY but may be used; submission must include a Program of Study visual organizer*

The submitted version of the CTE Program of Study template **must** be signed by both the appropriate high school and postsecondary administrator

COLLEGE: \_\_\_\_\_  
 HIGH SCHOOL(S): \_\_\_\_\_  
 \_\_\_\_\_

CLUSTER: \_\_\_\_\_  
 PROGRAM OF STUDY: \_\_\_\_\_  
 DATE: \_\_\_\_\_

	GRADE	REQUIRED COURSES				RECOMMENDED ELECTIVE COURSES OTHER REQUIRED OR ELECTIVE COURSES			
		ENGLISH	MATH	SCIENCE	SOCIAL STUDIES	CAREER AND TECHNICAL EDUCATION COURSES			
SECONDARY	9								
	10								
	11								
	12								
POSTSECONDARY	Year 1 1st Quarter								
	Year 1 2nd Quarter								
	Year 1 3rd Quarter								
	Year 2 1st Quarter								
	Year 2 2nd Quarter								
	Year 2 3rd Quarter								



Funded by the U. S. Department of Education  
 (V051B020001)

Required Courses
Recommended Elective Courses
Career and Technical Education Courses
Credit-Based Transition Programs (e.g. Dual/Concurrent Enrollment, Articulated Courses, College Now) (◆=High School to Com. College) (●=Com. College to 4-Yr Institution) (■=Opportunity to test out)
Mandatory Assessments, Advising, and Additional Preparation

\_\_\_\_\_  
 High School Administrator

\_\_\_\_\_  
 Postsecondary Administrator or Community College Dean