

OREGON CTE POLICY GUIDEBOOK

2023-2024

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FOREWORD

A joint statement from the Oregon Department of Education (ODE) and the Higher Education Coordinating Commission's Office of Community Colleges and Workforce Development (HECC/CCWD) reads:

The 2020-2024 [Oregon CTE State Plan](#) reimagines and transforms the experiences of every learner to enhance their future career prospects; empower their communities; and ensure equity in an inclusive, sustainable, innovation-based economy.

When the Oregon CTE State Plan was adopted, there was no way to imagine the changes our education system and society would experience. Oregon's vision for Career and Technical Education (CTE) still holds true, but there is a new sense of urgency to integrate CTE more seamlessly into secondary schools and integrate community college, youth development, and workforce development systems to offer the training vital to economic recovery. CTE programs are a cornerstone strategy to connect education and workforce development so as to grow a strong, equitable economy.

Oregon's vision for CTE can be accomplished only through partnership, collaboration, and coordination among education and workforce community partners. Together, ODE and HECC/CCWD are committed to this work.

For more than 166,000 K-12 learners participating in CTE, and over 5,500 postsecondary learners completing CTE programs at Oregon colleges annually, ODE and HECC/CCWD have an opportunity to remove barriers and ensure high-quality learning and access for each learner, regardless of race, gender, or zip code.

The Oregon CTE State Plan underlines the importance of collaboration and coordination and the value of engagement of partners across the systems. It provides a strategic plan and broad goals to achieve that plan. In addition, it contains action steps to achieve those goals. Together, they form a foundation for the work ahead.

The committed focus on equity continues to be at the forefront as we move forward in achieving our vision, but the call to ensure an antiracist approach to our policies and procedures is even more urgent, as there has been a disproportionate impact of COVID on our tribal communities and communities of color. CTE will be truly high quality only when race, gender, and place are not predictors of economic stability and career opportunity. The following essential elements have been identified in collaboration with multiple community partners as we strive to transform learner experiences.

1. High Quality CTE Programs of Study (POS) leading to meaningful careers in high-skill, high-wage, in-demand careers that provide a sense of pride and contribution to communities.

2. Information to successfully navigate career pathways to a meaningful career through intentional exposure to and communication about careers.
3. Connections between technical and academic learning in education settings and the workplace through work-based learning opportunities.
4. Experts who contextualize learning and create robust integration of academic and technical content.
5. Flexible learning systems that allow Oregonians to gain necessary skills where and how they best meet learners' needs.

ODE and HECC/CCWD are committed to advancing equity through the following practices:

1. Centering on equity in rule making, budgeting, and resource allocation processes by drawing upon data and community partners' feedback to identify and interrupt patterns of inequity.
2. Building fluency and comfort with change by strengthening systems and partnerships to remove barriers.
3. Collaborating with communities and learners through comprehensive outreach and communication about CTE.

If you see areas of inequity or places to improve CTE, please reach out to our state team.

The 2023-2024 CTE Policy Guidebook is an important step in ensuring the development of and access to high-quality CTE for Oregonians. It creates a one-stop shop of information on how to manage and implement CTE POS. This guidebook is a starting place for ongoing dialogue about growing and improving CTE implementation in Oregon. We intend to update this guidebook on an annual basis. We will take the lead in gathering updates and reach out to interested parties and community partners to inform the necessary changes. We hope that our guidance continues to improve and change to meet the needs of CTE in Oregon and that this guidebook will be one way we work together in achieving Oregon's vision for CTE.

Celia Núñez

Deputy Director
Office of Community Colleges and Workforce
Development
Higher Education Coordinating Commission

Jennell Ives

Director
Secondary-Postsecondary Transitions Team
Oregon Department of Education

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Equity Stance

ODE defines education equity as the equitable implementation of policy, practices, procedures, and legislation that translates into resource allocation, education rigor, and opportunities for historically and currently marginalized youth, learners, and families, including civil rights protected classes. This means the restructuring and dismantling of systems and institutions that create the dichotomy of beneficiaries and the oppressed and marginalized.

HECC/CCWD is committed to improving success and ensuring environments are conducive to optimum learning for all learners, with a particular focus on those who are historically and currently marginalized in higher education, including learners of color, low-income, and other underserved populations. Achieving the universal goal of educational equity requires targeted strategies to eliminate racial disparities and other identity-based disparities. HECC/CCWD is committed to intentional action as an anti-racist, equity-centered agency and commission.

Oregon's commitment to equity is reflected in the [Oregon CTE State Plan](#)—referenced later in this document and posted on the [Oregon Department of Education website](#)—as well as the [HECC/CCWD Equity Lens](#). (The 2024-2027 Oregon CTE State Plan will be forthcoming in early 2024.)

What is Career and Technical Education?

Career and Technical Education (CTE) is content, programs, and instructional strategies based on business and industry skill sets and needs. Instruction incorporates standards-based academic content, technical skills, and workplace behaviors necessary for success in careers of the 21st century. CTE incorporates applied learning that contributes to the individual's development of higher-order reasoning and problem-solving skills; work attitudes; general employability skills; technical skills; occupation-specific skills; and knowledge of all aspects of an industry, including entrepreneurship. Instruction focuses in areas such as agriculture, food, and natural resources systems; arts, information, and communications; business and management; health sciences; human resources; and industrial and engineering systems.

CTE Companion Definition

The following companion definition may be useful for those in education as well as those outside of education who must understand CTE to be strong partners and effective critical friends:

- CTE is an educational program for high school and community college learners based on individual interest and industry need. CTE comprises programs offered in six career areas: agriculture, food, and natural resources systems; arts, information, and communications; business and management; health sciences; human resources; and industrial and engineering systems. It includes programs in high-wage, in-demand

areas. CTE prepares and supports learners in acquiring the technical skills, professional practices, and academic knowledge critical for success in highly skilled careers.

- CTE is good for business because it equips potential employees with certifications as well as the technical, collaboration, and problem-solving skills to succeed in the diverse, increasingly complex workplace of today and tomorrow.
- CTE is good for community colleges because it engages learners in relevant learning that increases the completion rate, improves persistence and retention through contextual learning, and is a means to collaborate with high school teachers and business partners to strengthen systems and remove barriers that prevent learners from being career and college ready.
- CTE is good for high schools because it engages learners in relevant learning that increases the graduation rate, improves learner performance through authentic and applied learning experiences, and is a means to collaborate with community college instructors and business partners to build a robust path to success after the high school experience. CTE provides opportunities for meaningful collaboration with historically and currently marginalized communities and learners to drive and communicate the best decisions supporting career and college readiness.
- CTE is good for learners and families because the hands-on, meaningful, and engaging learning experiences inspire learners to stay in school, participate, achieve goals, and learn. CTE increases marketable skills and thus learners’ ability to strive for careers that make sense with their goals and aspirations.

The CTE educational experience is practical and affordable, connecting learners to fulfilling careers and providing the shortest path to a living wage.

Career and Technical Education Contacts

State CTE Director and Secondary-Postsecondary Transitions Team Director, Office of Teaching, Learning and Assessment:

[Jennell Ives](#) - 971-208-0397

Deputy Director, Office of Community Colleges and Workforce Development (CCWD):

[Celia Núñez](#) - 503- 979-5745

Department of Education (ODE) Secondary-Postsecondary Transitions Team (SPST) Staff—CTE/STEM

Rebecca Amodeo	Program Analyst—CTE & Perkins Data & Reporting	971-208-0499
Jennifer Beachy	Secondary-Postsecondary Transitions Team Administrative Support	503-551-7018
Sandy Cassio	CTE Grant and Program Coordinator	971-208-0380
Linda Catterall	Project Management; Web Coordination	971-208-0364

Brandie Clark	Education Program Specialist—Apprenticeship Liaison & Work-Based Learning	971-239-8662
Tim Conbere	CTE Civil Rights Policy Analyst	971-208-0420
Ron Dodge	Education Program Specialist—Business & Management; Oregon Skill Sets; POS; Student Leadership	971-208-0373
Johnie Ferro	Education Program Specialist—CTE Career Exploration; Human Resources	971-208-0227
Daniel Findley, PhD	Education Program Specialist—Industrial & Engineering Systems	971-208-0413
Reynold Gardner, PhD	Education Program Specialist—Agriculture, Food & Natural Resources Systems; Perkins Budget Support	971-208-0507
Dana Hathaway	CTE Civil Rights Policy Analyst	971-208-0482
Jennell Ives	State CTE Director & Perkins Administration	971-208-0397
Margaret Mahoney	Education Program Specialist—Teacher Licensure; Professional Learning; OACTE Liaison; CTE Network	503-480-5413
Beth Molenkamp	Education Program Specialist—Career Connected Learning Coordinator	971-208-0352
Karin Moscon	Civil Rights Education Specialist—Methods of Administration Coordinator	503-569-2532
Donna O’Kelley	Education Specialist—Aligning for Student Success	971-208-0301
Liz Rain	Education Program Specialist—Health and Biomedical Sciences	971-239-8693
Jeff Rhoades	Education Program Specialist—Arts, Information & Communication Technologies	971-208-0223
Susan Samek	Career Connected Learning Tribal Liaison	971-208-0096
Malinda Shell	Perkins Grant Manager/CTE Investments Specialist; Department of Corrections	971-208-0467
Carly Sichley	Program Analyst—CTE & Perkins Data; CTE POS	971-208-0284
TBD	Program Data Analyst—CTE/McKinney Vento/Civil Rights	n/a

HECC/CCWD Staff—Perkins/CTE staff

KC Andrew	Education Program Specialist—Postsecondary CTE, Ag, Food, Natural Resource Systems (NR Ag), Health Sciences & Human Resources	503-979-5670
Kasena Dailey	Program Coordinator—Postsecondary CTE, GED	503-979-5477

Shalee Hodgson, EdD	Policy Advisor—CTE, Competency Based Education, Credit for Prior Learning	971-372-0889
Luis Juárez	Education Program Specialist—Postsecondary CTE & Perkins; Arts, Information & Communications (AC), Business & Management (BU), Industrial & Engineering Systems (IE)	503-947-2430 or 971-375-5231
Eric Juenemann	Career Connected Learning Specialist	503-979-5336
Kyle D. Thomas	Community College Career Pathways Program Analyst	971-332-0642
Kelly Zinck	Education Team Research Analyst	503-979-5671

[Additional ODE Contacts](#) (Directory of Services and Personnel)

Jennifer Patterson	Assistant Superintendent—Office of Teaching, Learning & Assessment	971-304-9043
Beth Wigham, EdD	Education Program Specialist—CCR/School Counseling	971-208-0495

2023-2024 Important CTE Dates

See [Perkins dashboard](#) for details.

PERKINS	7/1/23	2023-2024 Perkins Grant Funds available
Secondary Career Pathways	7/1/23	2023-2025 Biennium Begins
CTE Meeting	7/31/23	Summer CTE Meeting
CTE Meeting	8/1/23	Summer CTE Meeting
Secondary Career Pathways	8/14/23	2021-2023 Claims Submitted
Civil Rights and MOA	9/1/23	MOA Secondary Selection Process
PERKINS	9/15/23	Perkins Improvement Plan
PERKINS	9/15/23	2022-2023 Closeout
PERKINS	9/29/23	2023-2024 Updated Consortia Handbooks
PERKINS	9/29/23	Updated Budget Narrative
Secondary Career Pathways	9/30/23	Final Report - 2021-2023 Biennium
PERKINS	9/30/23	2023-2024 Perkins Funds Encumbered
Civil Rights and MOA	10/13/23	Secondary Notification
POS	10/23/23	Yearly Updates – School Submission
POS	10/27/23	CTE Program Yearly Update
Civil Rights and MOA	10/30/23	Postsecondary Selection and Notification
PERKINS	10/31/23	2023-2024 IG Quarterly Report--Quarter 1
PERKINS	11/15/23	2022-2023 Final Claims in EGMS
PERKINS	11/15/23	2022-2023 Annual Fiscal Report
DATA	11/30/23	2022-2023 Perkins 90% Validation
POS	12/1/23	Yearly Updates to Regional Coordinators
PERKINS	12/1/23	2023-2024 Inventory Delivered
CTE Meeting	12/7/23	Virtual Coordinator Meeting
POS	1/12/24	2023-2024 Yearly Update
DATA	1/12/24	2023-2024 Yearly Update
Secondary Career Pathways	1/13/24	Application Submissions
Secondary Career Pathways	1/15/24	2023-2024 Funds Available
PERKINS	1/31/24	2023-2024 IG Quarterly Report--Quarter 2
PERKINS	2/1/24	2022-2023 Consortium Change Requests
CTE Meeting	2/1/24	Virtual Coordinator Meeting
PERKINS	4/30/24	2023-2024 IG Quarterly Report--Quarter 3
Civil Rights and MOA	5/31/24	Secondary and Postsecondary Reviews
CTE Meeting	6/6/24	Virtual Coordinator Meeting
Secondary Career Pathways	6/30/24	All 2023-2024 funds spent, items received
Secondary Career Pathways	8/14/24	All Year 1 of 2023-2025 Claims Submitted
Secondary Career Pathways	9/30/24	Final Report due for Year 1 of Biennium
PERKINS	11/30/24	2023-2024 IG Quarterly Report--Quarter 4

1 – Introducing the Oregon CTE Policy Guidebook

1.1 Purpose of the Guidebook

This guidebook is a resource for secondary and postsecondary educators who are interested in Career and Technical Education (CTE) or who work directly in CTE programming. The purpose of this guidebook is to not only provide an understanding of federal and state requirements and guidance developed for CTE programs benefiting from Perkins funding; it also seeks to provide a broader perspective of the system of CTE in Oregon. This guidebook highlights specific sections of the federal Perkins V Act and the [Oregon CTE State Plan](#) that are critical for understanding the requirements of the Act for implementation in Oregon.

The Oregon CTE Policy Guidebook has been developed and reviewed by a team of secondary and postsecondary CTE leaders and state staff to be the main and trusted source of information for CTE administrators in administering CTE programs in Oregon. This is a living document, and as such it has some sections that will need to be completed over the coming years, some sections that will need to be updated with new dates, and other sections that will need to change as the education landscape shifts. The intent is to eventually include all state and federal CTE resource information so that it becomes a one-stop shop for high-quality CTE programming. The guidebook is intended to undergo an annual review process to maintain the most updated information. The Oregon Department of Education (ODE) and the Office of Community Colleges and Workforce Development (HECC/CCWD) gratefully appreciate any feedback. Please submit comments to [Sandy Cassio](#).

1.2 What’s New in the 2023-2024 Version

The Oregon CTE Policy Guidebook has been updated for the new school year. Many sections were updated only slightly, to reflect date changes or provide clarification of information. CTE/Perkins has become part of the Aligning for Student Success Initiative that is referred to as the Integrated Application, or the Integrated Guidance (IG). Some of the nuances of the implementation will continue to evolve throughout the 2023-2024 school year. The substantive changes are noted below:

- Aligning for Student Success: Integrated Guidance has been added to applicable sections throughout.
- Terminology update: Special Populations has been updated to Focal Students.
- Section 20: Additional CTE Funding Sources has been added.
- Section 1.5: Guide to Acronyms has been added.

1.3 How to Effectively Navigate this Document

To easily jump to the specific topic, follow these steps:

1. Open document to full screen.
2. Click on the view tab.
3. Under the show section, select Navigation Pane.

This will open a navigation tool on the left side of the page that will appear like a table of contents. Users may scroll down through the navigation pane or use the Search Document function at the top.

1.4 Errors and Omissions

As users find information that may be erroneous, unclear, or left out of the guidebook, please notify us through the [Oregon CTE Policy Guidebook Update Request Form](#).

1.5 CTE Terms and Common Acronyms

In addition to the list of frequently used terms and acronyms that follows, please refer to the [glossary](#) in the CTE State Plan:

- **CIP:** Classification of Instructional Programs
- **CTE:** Career and Technical Education
- **CTSO:** Career and Technical Student Organization
- **CWE:** Cooperative Work Experience
- **ESSA:** Every Student Succeeds Act
- **HECC/CCWD:** Higher Education Coordinating Commission's Office of Community Colleges and Workforce Development
- **HQPOS:** High Quality Program(s) of Study
- **IAP:** Instructor Appraisal Committee
- **IG:** Integrated Guidance
- **MOA:** Methods of Administration
- **ODE:** Oregon Department of Education
- **PATP:** Pre-Apprenticeship
- **PDP:** Professional Development Plan
- **PII:** Personally Identifiable Information
- **PLC:** Professional Learning Community(ies)
- **POS:** Program(s) of Study
- **SPST:** Secondary-Postsecondary Transitions
- **WIOA:** Workforce Innovation and Opportunity Act

1.6 Notice of Nondiscrimination

It is a policy of the State Board of Education and a priority of the ODE and the Office of Community Colleges and Workforce Development that there will be no discrimination or harassment on the grounds of race, color, sex, marital status, religion, national origin, age, sexual orientation, gender identity, or disability in any educational programs, activities, or employment. Persons having questions about equal opportunity and nondiscrimination should contact:

[Kate Hildebrandt](#)

255 Capitol Street NE
Salem, Oregon 97310
Phone: 503-551-5713

2 – CTE Programmatic Supports in Oregon

2.1 State and Federal Initiatives in Addition to Perkins V

The Oregon Legislature values Career and Technical Education (CTE) and continues to make state funding available for high-quality CTE programs through Secondary Career Pathway Grants, CTE Revitalization Grants, High School Success, support for Student Leadership, and Future Ready Investments Oregon. Federal funds have also been used to supplement state funding available for CTE. Oregon coordinates the use of all funds to ensure equity in access to high-quality CTE programs across the state.

2.2 Aligning Student Success Initiative

Through the [Integrated Guidance \(IG\)](#), CTE/Perkins has been included in the community engagement, prioritization of needs, and application process, along with five other state initiatives.

1. High School Success (HSS)
2. Student Investment Account (SIA)
3. Continuous Improvement Planning (CIP)
4. Career Technical Education (CTE/Perkins)
5. Every Day Matters (EDM)
6. Early Indicator and Intervention Systems (EIS)

The guidance creates significant opportunities to improve outcomes and learning conditions for learners and educators. The IG offers the opportunity to align efforts and reduce redundancy at the local and regional levels. Much more will be shared about the IG throughout this guidebook.

2.3 Overarching State and Federal Initiatives Supporting CTE

These initiatives are managed largely outside of the CTE team but are part of the overall collaborative efforts to improve outcomes for Oregon learners. A brief explanation of some of these programs is provided below.

Federal Initiatives

[Every Student Succeeds Act \(ESSA\)](#)

ESSA is a federal school accountability law rooted in supporting all learners equitably and building systems that eliminate barriers to learner success; it replaced No Child Left Behind in 2015. As part of ESSA, all states developed a plan for improving education, which they submitted to the U.S. Department of Education (USDOE). The plan Oregon submitted to the USDOE centers on four key commitments:

1. Advancing Equity
2. Promoting a Well-Rounded Education
3. Strengthening District Systems
4. Fostering Ongoing Engagement

[Workforce Innovation and Opportunity Act \(WIOA\)](#)

WIOA was signed into law on July 22, 2014. WIOA is designed to help job seekers access employment, education, training, and support services to succeed in the labor market and to match employers with the skilled workers they need to compete in the global economy. WIOA strengthens and improves the nation's public workforce system, helps Americans—including youth and those with significant barriers to employment—obtain high-quality jobs and careers, and helps employers hire and retain skilled workers. WIOA's three hallmarks of excellence are:

1. The needs of businesses and workers drive workforce solutions, and local boards are accountable to communities in which they are located.
2. [WorkSource Oregon](#) One-Stop Centers provide excellent customer service to job seekers and employers and focus on continuous improvement.
3. The workforce system supports strong regional economies and plays an active role in community and workforce development.

State Initiatives

[Student Success Act - Student Investment Account](#)

The Student Success Act was passed during the 2019 legislative session. Part of that legislation was the Student Investment Account (SIA). The two state purposes for those funds include the following:

- Meeting learners' mental or behavioral health needs
- Increasing academic achievement for learners, including reducing academic disparities for learners from focal groups

Funds from the SIA may be used to expand instructional time, address learner health and safety, reduce class size, and provide a well-rounded education—including broadening CTE options.

[High School Success](#)

Another program contained within the integrated application is High School Success—a fund initiated by ballot Measure 98 in November 2016. The intent of High School Success is to improve learner progress toward graduation beginning with grade 9, increase the graduation rates of high schools, and improve high school graduates' readiness for college and career. All High School Success recipients must meet eligibility requirements in order to receive and spend funds. Funding is provided to establish or expand programs in three specific areas:

- Dropout Prevention
- Career Technical Education
- College-Level Education Opportunities

[STEM Investment Council](#)

Oregon's STEM Investment Council, established and authorized by HB 2636 (2013), functions under the direction and control of the State Board of Education and HECC/CCWD. The Council receives staff support from HECC/CCWD's Office of Workforce Investments. The Council has a

legislative mandate to assist the State Board of Education and HECC/CCWD in developing and overseeing a long-term strategy to meet the following statutorily established STEM education goals by 2025:

1. Double the percentage of learners in 4th and 8th grades who are proficient or advanced in mathematics and science, as determined using a nationally representative assessment of learners' knowledge in mathematics and science.
2. Double the number of learners who earn a postsecondary degree requiring proficiency in science, technology, engineering, or mathematics.

[Workforce and Talent Development Board](#)

The Oregon Workforce Talent and Development Board (WTDB) is the overall advisory board to the Governor on workforce matters, including developing a strategic plan for Oregon's Workforce Development System. The WTDB is dedicated to investing in Oregonians to build in-demand skills, matching training and job seekers to opportunities, and accelerating career momentum. From innovative apprenticeships in the healthcare and information technology fields to credentials that certify essential skills for workplace success, there are many opportunities to build skills and training, accelerate career momentum, and advance along career pathways. The WTDB vision states that "a strong state economy and prosperous communities are fueled by skilled workers, quality jobs, and thriving businesses." According to the WTDB, talent development work is focused on identifying in-demand occupations and skills and current and future talent needs and gaps, engaging the voice of business and industry, and including public workforce system community partners.

2.4 CTE Specific State and Federal Initiatives

Federal Initiatives

Strengthening Career and Technical Education for the 21st Century Act (Perkins V)

The federal investment in vocational or career and technical education has been in place for well over 100 years. In 2018, the legislation governing this grant program—commonly referred to as Perkins V—was reauthorized. The requirements and recommendations of Perkins V are largely contained later in this guidebook.

State Initiatives

The following initiatives are also funded by the Oregon Legislature and are specifically intended to support CTE.

- **CTE Revitalization:** CTE Revitalization Grants are intended to help rejuvenate existing Programs of Study (POS) that have fallen into decline and to foster the creation of new programs where they did not exist prior. Grants emphasize community and business engagement, postsecondary alignment, and alignment with principles of High Quality Programs of Study (HQPOS) so that learners can progress to college or career after completing high school.

- **Secondary Career Pathway funding:** Secondary Career Pathway Grants were initially provided to financially incentivize the development of CTE POS that encapsulated three credits, earned industry credentials, and provided access to historically and currently marginalized learners. Funds were provided directly to benefit programs and ranged from \$2,000 to \$45,000. [See Section 21.](#)
- **CTSO Chapter Grant:** The purpose of this grant is two-fold: 1) to support the administration and operation of each of the nine student leadership organizations in the state, and 2) to provide for Chapter (mini) grants for local chapters of the organizations to help cover the costs of operating a local chapter (including travel, fees, uniforms, testing materials, etc.).
- **FFA Grant:** Funds are provided for FFA programming, including dues, Ag Experience Tracker software, and career development experiences. Teacher stipends for summer work are also included.
- **[Community College Career Pathways:](#)** Funds are allocated to Oregon’s community colleges to support learner pathways to CTE. The funds support the development of connected education and training programs along with student support services that enable individuals to secure a job or advance in a demand industry or occupation. Career Pathways is also an evidence-based model that improves learner outcomes and closes equity gaps through high-quality training programs and support services that help learners succeed.

3 – The Strengthening Career and Technical Education for the 21st Century Act (Perkins V)

The Strengthening Career and Technical Education for the 21st Century Act (Perkins V) amends the Carl D. Perkins Career and Technical Education Act of 2006 (Perkins IV). The new act was signed into law July 31, 2018, and went into effect July 1, 2019. For the sake of brevity, the Strengthening Career and Technical Education for the 21st Century Act will be referred to as Perkins V throughout this guidebook.

There are three Titles in Perkins V:

- Title I – Career and Technical Education Assistance to the States:
 - This section is most applicable to readers of this guidebook as it applies largely to all local grant recipients and state level grant requirements.
- Title II – General Provisions:
 - This section mostly references federal administration requirements.
- Title III – Amendments to Other Laws:
 - This section aligns with other federal initiatives.

Some provisions of Perkins V went into effect for the 2019-2020 school year, which served as a transition year for the new law. Full implementation began for the 2020-2021 school year. The reauthorization process was driven largely by a desire to ensure that learners are prepared for 21st century careers. This framing led to a workforce development focus throughout Perkins V with an emphasis on encouraging and incentivizing innovation within CTE. Each state is required to develop a state plan to describe the implementation of the new federal law. In Oregon, the planning team decided to develop a plan to guide the entire system of CTE in Oregon. Below is high-level information about Perkins V; additional information about the Oregon CTE State Plan is in [Section 4](#) of this guidebook.

3.1 – Purpose of the Act

According to Section 2 of the Perkins IV Act—with language as amended by Section 6 of Perkins V—the purpose of the Act is to develop more fully the academic knowledge, technical skills, and employability of secondary and postsecondary education students who elect to enroll in CTE programs and POS by

1. building on the efforts of states and localities to develop challenging academic and technical standards and to assist students in meeting such standards, including preparation for high-skill, high-wage, or in-demand occupations in current or emerging professions;
2. promoting the development of services and activities that integrate rigorous, challenging academic and career and technical instruction that link to secondary and postsecondary education for participating CTE students;
3. increasing state and local flexibility in providing services and activities designed to develop, implement, and improve CTE;

4. conducting and disseminating national research and disseminating information on best practices that improve CTE POS, services, and activities;
5. providing technical assistance that (A) promotes leadership, initial preparation, and professional development at the State and local levels; and (B) improves the quality of CTE teachers, faculty, administrators, and counselors;
6. supporting partnerships among secondary schools, postsecondary institutions, baccalaureate degree granting institutions, area CTE schools, local workforce investment boards, business and industry, and intermediaries;
7. providing individuals with opportunities throughout their lifetimes to develop, in conjunction with other education and training programs, the knowledge and skills needed to keep the United States competitive; and
8. increasing the employment opportunities for populations who are chronically unemployed or underemployed, including individuals with disabilities, individuals from economically disadvantaged families, out-of-workforce individuals, youth who are in (or have aged out of) the foster care system, and homeless individuals. (Final paragraph is new in Perkins V)

3.2 Title I—Career and Technical Education Assistance to the States-the Basic Grant

The Perkins V Act provides financial support for innovation and program improvement in CTE at both secondary and postsecondary levels.

Title I of the Act outlines the structure and requirements related to the Basic Grant under Perkins V. The Act specifies the formula to be used for the allotment and distribution of funds to states, as well as requirements for how states distribute Perkins V funds to local eligible agencies. In addition, the Act specifies uses of funds by both state and local recipients. The specific allocation process is included in [Section 10.2](#) of this guidebook. Perkins V legislation includes several requirements related to reporting and accountability, with many of the state-level requirements having parallel provisions for local recipients ([Section 14.20](#)). These requirements include submission of applications and performance reports at both the state and local level ([Section 12](#)). There is a requirement that both state and local recipients submit improvement plans if the agreed-upon, state-determined performance measures are not met.

TITLE I—CAREER AND TECHNICAL EDUCATION ASSISTANCE TO THE STATES

[Financial]

Sec. 111. Reservations and State allotment

Sec. 112. Within State allocation

Sec. 131. Distribution of funds to secondary education programs

Sec. 132. Distribution of funds for postsecondary education programs

Sec. 133. Special rules for career and technical education

Sec. 124. State leadership activities

Sec. 135. Local uses of funds

[Planning]

Sec. 122. State plan

- Sec. 134. Local application for career and technical education programs
[Accountability]
- Sec. 113. Accountability
[Improvement]
- Sec. 123. Improvement plans

3.3 Title II—General Provisions

Title II of the Perkins V Act refers to federal and state administrative provisions and is not largely of interest to the users of this guidebook. However, in Section 211, readers will find information about supplement—not supplant, and maintenance of effort requirements.

3.4 Title III—Amendments to Other Laws

This section points out that the authors of the Perkins V Act were clear that they intended to link Perkins with other federal initiatives. The overlap of Perkins V with the Every Student Succeeds Act (ESSA) and the Workforce Innovation and Opportunity Act (WIOA) is clear.

3.5 Understanding Perkins V Shifts

The Association for Career and Technical Education (ACTE) provides a [full summary of the new law](#) on its website.

4 – Oregon Career and Technical Education Program Overview

Oregon’s CTE 2020-2024 State Plan is the required [Perkins State Plan](#). Using the vision for CTE ([Section 4.3](#) of this guidebook), the plan was developed to provide a high-level, four-year strategic plan outlining broad goals to guide Oregon’s work around CTE. The Oregon CTE State Plan was developed with input from more than 1,300 community partners and was adopted by the State Board of Education in March 2020. This plan also serves as the compliance document for Perkins V. (Oregon’s CTE 2024-2027 State Plan is forthcoming in early 2024.)

4.1 Vision and Definition of CTE

The [definition and companion definition of](#) CTE can be found in the introduction of this document.

4.2 Commitment to Equity

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

The ODE and HECC/CCWD commitment to equity means continuous examination of policies, practices, and procedures to ensure access to high-quality CTE regardless of a learner’s zip code or other demographic characteristics. To advance this commitment, the following practices will be emphasized:

1. Center on equity in rule making, budgeting, and resource allocation processes through close examination of data and collaborator feedback to not only identify, but to also interrupt, patterns of inequity.
2. Build fluency and comfort with change by continually strengthening systems and partnerships to remove barriers.
3. Utilize meaningful collaboration with diverse communities and learners who are impacted by decisions about CTE through comprehensive outreach and communication.

To realize this commitment, full engagement with focal student groups and their families is critical. Focal students are defined in Oregon as students of color, students with disabilities, students who are homeless, foster learners, LGBTQ2SIA+ students, students recently arrived, migrant students, students with experience of incarceration or detention, and economically disadvantaged students.¹ The term, “focal students” will be used to replace the federal Perkins V (CTE) term, “special populations.”

For more information about Oregon’s commitment to equity, please visit the ODE [Equity Initiatives web page](#) or the HECC/CCWD [Equity and Student Success web page](#).

¹ <https://secure.sos.state.or.us/oard/viewSingleRule.action?ruleVrsnRsn=297524>

4.3 Essential Components to Achieve the Vision for CTE

Equipped with a vision for CTE in Oregon and a commitment to equity, the five essential components below have been identified as necessary to transform learner experiences and achieve the 2020-2024 CTE State Plan vision. All learners will:

1. Benefit from high-quality CTE programs leading to meaningful high-skill, high-wage, in-demand careers that provide individuals with a sense of pride and contribution to their communities.
2. Be empowered with information to successfully navigate career pathways to a meaningful career through intentional exposure to and communication about careers at all age levels.
3. Be able to transition seamlessly between technical and academic learning in education and the workplace through work-based learning opportunities.
4. Learn from a variety of knowledgeable experts who contextualize learning and create robust integration of academic and technical content.
5. Benefit from flexible learning systems that allow Oregonians to gain necessary skills where and how they best meet their needs.

4.4 Oregon CTE State Plan Goal Areas

In order to achieve the vision for CTE in Oregon, action plans have been developed, many of which are discussed later in this guidebook. Each of these goal areas has teams assigned to implement specific strategies and timelines, as discussed in the next section.

Goal Area	Matching Goals to Achieve the Vision of Oregon’s CTE State Plan
High-Quality Education Leading to Meaningful Careers	<ol style="list-style-type: none"> 1. Continuing to focus on building and improving strong CTE Programs of Study (POS) by strengthening our commitment to increase the enrollment of learners (specifically relative to key populations) in programs leading to high-wage, high-skill, and in-demand careers. 2. Creating voluntary statewide POS frameworks that will promote greater consistency in quality across the state, ensure more geographical equity, intentionally engage business and industry in the development of CTE programs across the state, and allow for resources to be more efficiently shared. 3. Focusing on a continuous improvement model to ensure programs are of sufficient size, scope, and quality. 4. Strengthening meaningful collaboration between secondary and postsecondary education and employers in POS application, design, and implementation. 5. Creating a multiple-measures indicator of college and career readiness that looks at college credit while in high school, industry recognized credentials, and work-based learning to support well-rounded, equitable approaches to preparing learners for life after secondary education. 6. Creating seamless transitions for learners so that they feel supported during the multiple entry and exit points on their career path. Individuals should

Goal Area	Matching Goals to Achieve the Vision of Oregon’s CTE State Plan
	have opportunities to build academic, technical, and essential employability skills through engagement in career exploration, CTE POS, and work-based learning that will prepare them for meaningful careers and life-long learning.
Pathways to Navigate to a Career	<ol style="list-style-type: none"> 1. Focusing on providing learners with opportunities to experience careers earlier by allowing Perkins funds to be spent in middle school to support activities linked to CTE POS. 2. Developing systems and support for Oregon career education for all learners. 3. Building a scope and sequence for career awareness and exploration, mapping resources and assets, and integrating with comprehensive counseling programs and community college guided pathways. 4. Providing K-12, postsecondary, and adult learners with career guidance and systems of support to learn about career opportunities and the paths for entering into those careers. 5. Providing work-based learning opportunities for learners to support seamless transitions.
Seamless Transitions through Work-Based Learning	<ol style="list-style-type: none"> 1. Creating an Oregon work-based learning website. 2. Adopting a vision for work-based learning in Oregon. 3. Implementing a work-based learning data collection system with clear definitions and measurements for Oregon.
Knowledgeable Experts	<ol style="list-style-type: none"> 1. Improving the recruitment and retention of CTE educators, including individuals in groups underrepresented in the teaching profession and those transitioning from business and industry. 2. Aligning systems of educator licensure and initial and ongoing professional development to enhance access to business and industry experts and currently licensed teachers who want to add a CTE endorsement.
Flexible Learning	<ol style="list-style-type: none"> 1. Incentivizing innovative approaches to creating multiple on-ramps and off-ramps to CTE programs in Perkins Reserve Fund Grants provided regionally. 2. Supporting at the state level for the creation of online CTE POS as appropriate while ensuring high quality to broaden opportunities for learners to participate in and benefit from CTE. 3. Supporting and sharing practices such as competency-based education, credit for prior learning, and accelerated learning.
Data Literacy and Accountability	<ol style="list-style-type: none"> 1. Improving the use of data to inform continuous improvement in CTE with a specific focus on equitable access, participation, and outcomes for historically underserved learners. 2. Improving data reporting systems for various end users of the data. 3. Improving data quality.

4.5 Partners in Implementation

Responsibility of State Leadership

The Oregon State Board of Education is the designated eligible agency responsible for the administration of Perkins V, and ODE is the fiscal agent for Perkins funding to the state of

Oregon. The Secondary-Postsecondary Transitions (SPST) team housed within ODE is responsible for managing the operations of the grant- and subgrant-supported activities to ensure compliance with applicable federal requirements and that performance goals are being achieved.

A Memorandum of Understanding is held between ODE and HECC/CCWD to outline the shared responsibility of the Office of Community Colleges and Workforce Development (CCWD) in implementation and compliance.

A list of staff members at both ODE and CCWD is included in the introduction of this guidebook, providing names, [contact information](#), and the current areas of responsibility for each staff member.

For more than a decade, ODE and CCWD have worked closely on shared implementation, communication, oversight, and compliance strategies.

The responsibilities of an eligible agency under Section 121 of the Perkins V Act include the following:

1. Coordination of the development, submission, and implementation of the Oregon CTE State Plan, and the evaluation of the program, services, and activities assisted under this title, including preparation for nontraditional fields.
2. Consultation with the Governor and appropriate agencies, groups, and individuals including teachers, faculty, specialized instructional support personnel, paraprofessionals, school leaders, authorized public chartering agencies and charter school leaders (consistent with state law), employers, representatives of business (including small businesses), labor organizations, eligible recipients, local program administrators, state and local officials, Indian Tribes or Tribal organizations present in the state, families, students, and community organizations.
3. Convening and meeting as an eligible agency (consistent with state law and procedure for the conduct of such meetings) at such time as the eligible agency determines necessary to carry out the eligible agency's responsibilities under this title, but not less than four times annually.
4. The adoption of such procedures as the eligible agency considers necessary to
 - a. implement state level coordination with the activities undertaken by the state boards under Section 101 of the Workforce Innovation and Opportunity Act; and
 - b. make available to the one-stop delivery system under Section 121 of the Workforce Innovation and Opportunity Act within the state a listing of all school dropout, postsecondary education, and adult programs assisted under this title.

Equity Partners

The Oregon CTE State Plan places equity at the front and center of the state's work. Engaging the voices of historically and currently marginalized learners, families, and representatives of our Tribes, and community-based organizations serving people who are experiencing

homelessness and at-risk populations, will help to remove barriers and ensure that access to high-quality programming is available to all learners.

State Plan Implementation Team (SPIT)

The State Plan Implementation Team (SPIT) is a cross-agency team charged with transparent oversight into the implementation of the Oregon CTE State Plan. The team comprises internal and non-agency staff responsible for resource allocation, progress monitoring, and barrier elimination to ensure the plan is enacted with a strong focus toward equity and quality.

Perkins Action Teams

There are seven action plans in the Oregon CTE State Plan. Each of these action plans has been assigned a lead at ODE or CCWD. A team consisting of staff from ODE and CCWD has been formed around each of the action plans to implement the goals and strategies. Other non-agency staff may be consulted as needed. Each action plan lead participates in the SPIT.

CTE Regional Coordinators – CTE Reserve Grant Coordinators

CTE regional coordinators provide primary leadership in the field to ensure teachers and learners are afforded consistency in the CTE experience. Each of the 17 CTE regions in the state has a CTE regional coordinator employed by a local community college, education service district (ESD), or school district to serve the region, coordinating CTE activities and administering Perkins consortia grants. The CTE regional coordinators are also responsible for monitoring and coordinating CTE needs and targeting improvement through the Perkins Reserve Grant. The CTE regional coordinator serves secondary and postsecondary CTE programming in their region. For a list of duties performed by the CTE regional coordinator, see [Section 11.3](#) of this guidebook.

Community College CTE Leaders

The Oregon Community College Career and Technical Education (CC CTE) leaders group comprises postsecondary CTE deans, vice presidents, associate deans, directors, and coordinators from Oregon’s 17 community colleges. The community college (CC) CTE leaders group plays a key role, supporting community college CTE instruction, fiscal/budget management, and CTE learner success. CC CTE leaders provide ongoing discussion and professional development opportunities to improve CTE programs and services and provide a multi-faceted communication link statewide.

Local Education Partners

Perkins V calls for ongoing consultation with CTE instructors and leaders, and specifically calls for consultation with non-CTE teachers, career guidance and academic counselors, instructional support personnel, paraprofessionals, academic and workforce advisors, financial aid directors, and admissions staff.

Local Business and Industry Partners

Local business and industry partners are key in the implementation of CTE programs. The legislation clearly includes a broad base of partners, including state and local workforce

development board, employers, and industry sector representatives. [Section 8](#) of this guidebook provides more information about the vital role of business and industry partners in program development and quality.

Learners and Families

CTE actively engages learners and families in planning and implementation of education initiatives. At the state and local level, families and learners are empowered to be at the table to inform discussion and action in their education.

5 – Methods of Administration

5.1 Introduction

The Methods of Administration (MOA) program is responsible for identifying, remedying, and preventing discrimination based on race, color, national origin, sex, sexual orientation, marital status, gender identity, age, religion, and disability in all secondary and postsecondary schools that offer CTE in Oregon. The program is responsible for ensuring that Oregon complies with the U.S. Department of Education requirement that every state monitor schools, school districts, and community colleges for civil rights compliance. The MOA program’s goal is to ensure a robust understanding, implementation, and enforcement of the following civil rights laws in Oregon’s secondary schools and community colleges:

- [Title VI of the Civil Rights Act of 1964, 34 CFR Part 100](#)
- [Title IX of the Education Amendments of 1972, 34 CFR Part 106](#)
- [Section 504 of the Rehabilitation Act of 1973, 34 CFR Part 104](#)
- [Title II of the Americans with Disabilities Act of 1990, 28 CFR Part 35](#)
- [Guidelines for Eliminating Discrimination and Denial of Services on the Basis of Race, Color, National Origin, Sex, and Handicap in Vocational Education, 34 CFR Part 100, Appendix B](#)

ODE and HECC/CCWD provide required oversight of the implementation and enforcement of civil rights laws throughout Oregon secondary schools and community colleges by utilizing the following:

- Compliance reviews of high schools, community colleges, and other institutions with CTE courses learner regarding implementation of state and federal civil rights laws.
- Issuance of written findings to schools.
- Negotiation of a voluntary compliance, monitored and completed in concert with ODE and the Office for Civil Rights.
- Analysis of civil rights data.
- Technical assistance to schools, districts, colleges, ODE, and HECC/CCWD.

The MOA program is part of ODE and HECC/CCWD efforts to bring equity to Oregon’s schools and colleges by building a foundation that can disrupt the patterns of injustice, as set out in the [Oregon Equity Stance](#) and [HECC/CCWD Equity Lens](#). The current [MOA Plan](#) and further information are on the [ODE Civil Rights and Equity](#) web page.

5.2 Selection Process - Secondary

Who may be selected?

Public secondary institutions that receive federal funding and offer courses to inform, orient, or prepare learners for careers may be selected. This will include education service districts, all school districts, technical centers and charter schools, youth correction educational programs (YCEP), alternative schools, and Oregon School for the Deaf.

Identification for selection

Each year, MOA will select 10 secondary institutions for review. Schools will first be ranked based on:

1. discrepancies identified through data for race, national origin, gender, and disability in the following areas:
 - CTE enrollment data
 - graduation and completion rates
 - ninth grade on-track learner data
 - learner attendance rates
2. the number of civil rights complaints received by ODE

Schools that have been visited in the last six years will be removed from the ranking. Secondary institutions will be categorized by size, and the highest-ranking schools in each size grouping will be selected for the review process.

5.3 Selection Process – Postsecondary

Who may be selected?

Any of Oregon’s 17 community colleges, all of which offer instruction that prepares learners for a certificate or associate degree in CTE, may be selected.

Identification for selection

Each year, the MOA team will select one postsecondary institution for review. Schools will be ranked based on:

1. Discrepancies identified through data for race, national origin, gender, and disability in the following areas:
 - CTE enrollment data
 - graduation and completion rates
2. The number of civil rights complaints received by CCWD
3. Date of last on-site visit

Colleges that have been visited in the last six years will be removed from the ranking, and the remaining top-ranking school will be selected for the review process.

5.4 Conducting the Review

Orientation

Once an institution has been selected for review, an orientation meeting will be scheduled with the MOA review team. The MOA review team will consist of ODE and/or HECC/CCWD personnel, the CTE regional coordinator/specialist, and staff from the school, district, ESD, or college. During orientation, the MOA review team will provide a checklist to guide preparations for the review process and to answer any questions the institution may have.

Secondary Institutions

The [Secondary Checklist](#) provides a list of regulations and evidence the MOA team reviews during the monitoring process; this can include desk monitoring as well as on-site reviews that include facilities.

Desk Monitoring

After an institution has been selected for review, the investigation team will begin the desk monitoring process. Desk monitoring will include the examination of documents requested and collected from the selected institutions, along with review of notices and documents available online and interviews with learners and staff from the institution. This process will also include the review of additional civil rights data specific to the identified district.

On-Site Facility Review

Each year three schools with the highest disproportionality of enrollment for learners with disabilities will be selected for an on-site review. The on-site review will include in-person interviews, additional document reviews, and facility review for compliance with ADA requirements.

The purpose of the on-site review is to ensure that all learners have access to CTE programs and activities. To ensure compliance with Section 504 and ADA requirements, the investigating team will examine all sites in the school that are utilized for school programs and activities.

In-person interviews or on-site observations may also be necessary for the investigation on a case-specific basis. If this occurs, the school will be notified, and an on-site visit *may* be conducted.

Postsecondary Institutions

The postsecondary monitoring process has a two-year schedule. The MOA team conducts desk monitoring in year one and the on-site review in year two.

The [Postsecondary Checklist](#) provides a list of regulations and evidence the MOA team reviews during the monitoring process and helps colleges identify which documentation to collect and provide.

Desk Monitoring

Each selected institution will, in the first year, be part of a desk monitoring process to examine documents requested and collected from the institution, along with review of notices and documents available online. This process will also include the review of additional civil rights data specific to the identified college.

On-Site Review

In the second year of a review cycle for a selected institution, the MOA team will conduct an on-site visit, which will include in-person staff and learner interviews and a full on-site facility

review. The purpose of the on-site review is to ensure that all learners have access to CTE programs and activities. To ensure compliance with Section 504 and ADA requirements, the investigating team will examine all sites at the college that are utilized for college programs and activities. This rotation will result in two colleges involved each year in the process: one college in desk monitor status and one in on-site visit status for the college that had a desk review the previous year.

Required Reporting

Every two years, ODE and HECC/CCWD are required to submit a report to the [U.S. Department of Education Office for Civil Rights](#) that demonstrates meeting the requirements of the MOA program. This report contains the findings, corrective actions, recommendations, monitoring status, and technical assistance provided during the previous biennium.

5.5 Role of the CTE Regional Coordinators/Perkins Grant Managers

When the MOA team selects an institution for review, the regional coordinators/Perkins grant managers have an important function in assisting the team in the review and serving as a liaison between ODE/HECC/CCWD and the institution's CTE programs.

Regional coordinators/Perkins grant managers can support the review in the following ways:

- Being available for questions during desk audit
- Prior to the site visit, assisting schools in gathering documents and providing data for review
- For the site visit, being part of the reviewing team, including assisting in facility review and the interview process
- Providing valuable insight into the history of CTE programs at the institution
- Reviewing and providing feedback on MOA's findings and proposed corrective actions
- Helping ODE and HECC/CCWD to provide commendations to be shared with the U.S. Department of Education Office for Civil Rights.
- After the site review, assisting institutions as they complete their corrective actions

Prior to the start of the review, regional coordinators/Perkins grant managers can expect the MOA team to contact them to arrange schedules and provide orientation to explain the review process and expectations in more detail. Additional details about the MOA program and team, including contact information, are available on the [ODE MOA/Civil Rights and Equity](#) web page.

6 – High Quality CTE Programs of Study (HQPOS)

6.1 Overview

In Oregon, the CTE Program of Study (POS) 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, Tribal community, or local area;
- progresses in specificity from a broad overview at the 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.

6.2 Elements of a High Quality Program of Study

Oregon achieves the federal definition of High Quality Programs of Study (HQPOS) by requiring six core elements in all state approved POS. Every CTE HQPOS must address the six core elements:

1. Access and Equity
2. Standards and Content
3. Alignment and Articulation
4. Accountability and Evaluation
5. Student Support Services
6. Professional Development

It is important for CTE administrators to understand the six elements of HQPOS to help ensure that an institution’s CTE programs are meeting the needs of learners as well as those of business and industry. All HQPOS are aligned to labor market needs based on advisory group recommendations and the local needs assessments. Below is a high-level overview of the six core elements of HQPOS.

1. Access and Equity
 - a. Provides all students and their families with appropriate knowledge and experiences to help make informed education and career decisions.
 - b. CTE programs are a central part of the school’s equity strategy, and demographics in CTE should mirror school demographics and positively impact local industry representation of historically and currently marginalized groups. CTE student outcomes contribute to the elimination of opportunity gaps and institutional discrimination.
2. Standards and Content

- a. **Rigorous Integrated Content:** CTE students have access to rigorous core academic coursework relevant to their career interests and the opportunity to apply academic, technical, and professional skills in both CTE courses and academic courses.
 - b. **Engaged Learning:** Learning is centered on the student’s interests, strengths, and needed areas of growth. Engaged learning involves opportunities to engage in meaningful projects connected to the community and is supported by the school, college, and community. Assessment of learning addresses industry-based standards and provides feedback to students and instructors that drives program improvement.
 - c. **Coherent Curriculum:** Sequence of courses that align to Oregon’s industry-identified knowledge and skill sets and progresses from introductory to advanced content.
3. **Alignment and Articulation**
- a. **Partnerships:** Formalized agreements exist with partners—including secondary and postsecondary education institutions, business and industry, and workforce development—around program development, design, implementation, and evaluation.
 - b. **Credentials:** CTE program concentrators can participate in work-based learning opportunities and earn industry recognized credentials, certificates, and degrees that increase their employability and ability to advance in their career of choice.
 - c. **Facilities and Equipment:** CTE programs maintain equipment that meets industry standards, and facilities follow safety and cleanliness standards of the industry and create a safe, welcoming, and accessible environment so all students may participate.
4. **Accountability and Evaluation**
- a. **Continuous Improvement:** Oregon’s HQPOS Rubric is a tool that can be used regularly for program evaluation and continuous improvement goals. Programs are continually revised based on advisory committee/industry partner input, as well as student participation and performance.
 - b. **Reporting:** Schools and institutions that have CTE programs collect and submit CTE data annually to the state in a two-part data cycle. These data points are used to inform program design and improvement and cumulate the Oregon report for federal requirements.
5. **Student Support Services**
- a. **Career Development:** There is a coordinated and sequenced career development system to support students before, during, and after participation in the CTE program. This can be accomplished by using a variety of tools, curriculum, resources, and advising practices. Each CTE student creates a personalized career and education plan to inform and guide their decision-making in the selection of coursework, career, and/or postsecondary goals. In collaboration with educators

and families, CTE students are informed of opportunities for CTE education and training in high school, college, apprenticeships, and other opportunities beyond the secondary classroom experience.

- b. Education for Employability: Students develop employability skills through classroom and course aligned work-based learning opportunities. Students actively develop leadership skills through student leadership opportunities (e.g., Career and Technical Student Organizations [CTSOs], school-based enterprises, etc.) tied to the CTE program. This may take the shape of one of the nine State Board recognized CTOS; alternatively, this leadership expectation may be accomplished by meeting the [Criteria for Developing Student Leadership](#).
6. CTE Professional Development: Each CTE educator has a Professional Development Plan (PDP) in place with goals related to the implementation of the POS. The plan should have connection to the local/regional needs assessment, ensure an equity focus, and be developed with input from the advisory committees. Any PDP adjustments reflect the continuous improvement design of the CTE POS.

6.3 Size, Scope, and Quality

The Size, Scope, and Quality definitions create the foundation for a CTE POS. During program approval, the evidence for program Size, Scope, and Quality listed below will be used jointly by secondary and postsecondary institutions to demonstrate that the CTE POS has the fundamental pieces in place. The expectation is that these will be met at all times and reviewed during the CTE POS renewal process. The evidence of Size, Scope, and Quality will be used in conjunction with the CTE POS Rubric and the CTE needs assessment to help create a plan for continuous improvement and a focus for allocation of resources. These terms are used to measure the overall ability of the CTE POS to address all the knowledge and skill statements standards of its identified skill set and to intentionally prepare learners for their next step on a complete and robust career pathway, whatever that next step may be. More on Size, Scope, and Quality can be found in [Appendix L](#) of the Oregon CTE State Plan.

6.4 Secondary and Postsecondary Alignment

Successful implementation of CTE relies on the engagement and support of our CTE partners: learners, families, tribes, diverse communities, educators, schools, colleges, business and industry, workforce development, local governments, and other state agencies. All of us play a role in supporting CTE and our learners who are seeking to build and expand their career opportunities. CTE POS only exist with partnership and alignment between K-12 and community colleges. Not only is the alignment required, but it also benefits everyone.

Learners:

- Education leading to meaningful careers in high-skill, high-wage, in-demand careers that provide individuals with a sense of pride and contribution to their communities
- Empowered with clear pathways to pursue education and career, with transparent, connected next steps on their education and training journey

- Clear and direct alignment between high-school and college programs with dual enrollment opportunities in some areas
- Pathways that lead to an Associate of Applied Science degree and may transfer to a university
- Clear understanding of the expectations of colleges and businesses
- Rigorous coursework with a project-based approach aligned to career interests
- Opportunities to earn industry recognized credentials that can support increased employability
- Elimination of opportunity gaps and institutional discrimination
- Opportunities to participate in career connected learning and student leadership organizations

K-12 and Community Colleges:

- Meaningful collaboration between secondary, postsecondary, and employers to build a robust pathway
- Reciprocity/shared learning between K-12 teachers and community college faculty
- Collaboration in the development of rigorous core academic coursework that is applicable to career interests
- Increases the high school graduation rate and supports college completion
- Supports equity strategies and reduces barriers for underserved populations
- Recruitment pathway from K-12 into college credit courses and programs
- Alignment of curriculum that prepares learners to be college and career ready
- Engagement with business and industry to inform program quality

Business, Industry, and Communities:

- Meaningful collaboration with educators to help meet current and future workforce needs
- Programs informed by and aligned to industry standards and identified labor market needs
- Opportunities to engage directly with learners, building relationships that link them to their next career step
- Supports strategies that positively impact the diversity and representation of local industry

Expectations of Alignment in CTE POS

By 2024, the Oregon CTE State Plan, with help from state, regional, and local partners, will support Oregon CTE programs, schools, and colleges to ensure that historically and currently marginalized learners and families are welcome, safe, and included in our institutions and programs. The goal is that all Oregonians will receive appropriate and equitable access to and benefits from CTE. The priority is to create quality relationships, experiences, and interactions among learners, educators, business partners, and community members.

Aligning through High Quality CTE POS can help achieve this goal and support activities including building a scope and sequence for career exploration and development, supporting local and regional implementation of the scope and sequence, mapping resources and assets, and integrating the scope and sequence with comprehensive school counseling programs and community college guided pathways.

Joint Expectations

- Engagement/collaboration between postsecondary and secondary partners around professional development and learning (PD) for educators, including creation of joint Professional Learning Communities (PLC)
- Scope and sequence of the CTE POS that includes what will be taught in secondary and postsecondary institutions in a seamless, non-duplicative manner
- Creating opportunities for teachers and instructors to build awareness of the curriculum and course outcomes at both secondary and postsecondary levels
- CTE POS Advisory Committees (local and regional)—Annual collegial alignment to industry standards meetings (2-3 times per year) involving teachers/instructors AND industry partners with the intent to keep the program of study aligned and up to date with current best practices in the industry
- When possible, creating on-campus live or virtual visits to the community college partner campus and visits from college faculty to the secondary programs to share opportunities for further education and training in the POS
- Making recruitment and pathway materials available to learners and families (in multiple languages) for their local high school and community college POS partners and statewide options for career paths

Aligning with CC Partners Outside of the Region

It is most beneficial for high schools to partner with their local community college in developing and supporting their CTE POS. There may be situations where a partnership/alignment with a local community college may not fit the needs of creating a HQPOS, particularly in very specific or niche programs.

In statewide CTE POS, the vision would be that learners in high schools across the state would be aligned to any of the college CTE programs that are participating in that CTE Program of Study. Alignment will be supported through ongoing professional learning between K-12 and higher education educators and connection to the college's and state's industry advisory committee.

Aligning with CC Partners Outside of the State

For Oregon learners, an Oregon community college is often the most affordable option. While an Oregon community college/K-12 partnership is required for an approved POS, a secondary school can also partner and create pathways for their learners with colleges that most closely

align with the needs of their learners, particularly in those border communities where an out-of-state institution may make the most sense for learners.

6.5 Continuum of CTE Programs

There is a continuum of CTE programming in Oregon, representing a progression in commitment and intensity. The development of a CTE POS starts with a community need. Educators, employers, and other community partners come together to design a program to meet that community's need. CTE High Quality POS are designed and built over time, and usually evolve as industry evolves. Typically, the progression looks like the following:

1. Exploring Interests and Careers

In Oregon, this is known as career connected learning. It encompasses a variety of activities to support learners in developing an awareness and opportunities for exploration into the world of careers. It may include a collection of interest and aptitude-based activities and/or courses offered during class time or outside of class hours. It could also align with industry tours and interviews with professionals working in a field of interest. Additionally, the [Career Journeys](#) video series—produced in partnership with the Journalistic Learning Initiative, the University of Oregon School of Journalism and Communication, and ODE—is a great way for learners to learn more about a wide variety of careers, and it comes with lesson supports for teachers to help deepen learners’ learning. Typically, this type of programming provides interesting and engaging content for learners while exploring information about career options and interests based on their aptitude and/or school, family, and life experiences. These opportunities may integrate or be supported by academic content as well as business and industry engagement activities. Some examples might include CTSOs, robotics programs, community-based clubs, maker space, introduction to careers, CTE/career exploratory wheels, coding club, summer programs, etc. Depending on the progress of a learner in discovering and selecting a potential career pathway, every effort should be made for learners to be able to access these types of activities and programming at any point in their secondary experience (Grades 5-12).

Oregon has a network of Career Connected Learning Systems Navigators who partner with multiple entities in each area of the state. If you would like to partner with someone related to career connected learning opportunities, you can contact your regional navigator. You will find contact info on the ODE [Career Connected Learning page](#).

2. Start-Up CTE Program

A Start-Up CTE program is an intentional sequence of secondary CTE courses leading to the development of a full CTE POS. The start-up phase of a CTE program may last up to three years, building to a full CTE POS meeting [size, scope, and quality](#) requirements. A course may be identified as a CTE class if it includes instruction addressing skills from the Oregon Skill Sets, is taught by a CTE-endorsed teacher, and is included within a state-approved CTE program. Perkins federal funding may be used for some of the start-up costs associated with the development toward a full CTE POS. Start-Up CTE programs

do not have to meet all the required elements of a CTE POS until applying for full CTE POS status.

An example of a Start-Up CTE program is a new course in entrepreneurship in year one that builds into a full marketing program of study offering three secondary credits two years later.

After the online application is submitted and approved, the Start-Up CTE Program will be included in the list of approved programs for the school year following application submission in the CTE Information System, which may trigger eligibility for Perkins fund support (subject to local/regional policies) as well as involvement in student leadership opportunities as described in [Section 7.5](#). Learners accumulating credits in a start-up program may also expedite program eligibility for Secondary Career Pathway funding when the program reaches full status.

3. CTE Program of Study

Based in federal [Perkins Act](#) legislation, a CTE POS (secondary/postsecondary) is a state-approved, non-duplicative sequence of courses, developed by a partnering secondary school district and postsecondary institution, which prepares learners to transition seamlessly across education levels and into the workforce. Coursework integrates rigorous academic knowledge with industry-validated employability and technical skills that could lead to an industry recognized credential. These programs feature contextualized and hands-on courses, with a minimum of three high school credits. Educators must align CTE programming with labor market needs, meet criteria for [Program Size, Scope, and Quality](#), address all of Oregon’s six required elements of a POS, and continuously improve the quality by using the Oregon CTE POS Quality Rubric.

In the CTE POS, learners clearly understand the career pathway and have access to career guidance and student supports to ensure they receive the academic and technical skills to move to employment or next step education and training for a high-skill, high-wage, or in-demand position. Learners participating in these programs will likely experience college coursework, internships, and/or work-based learning. Perkins federal funding may be used to support the additional costs associated with the CTE POS.

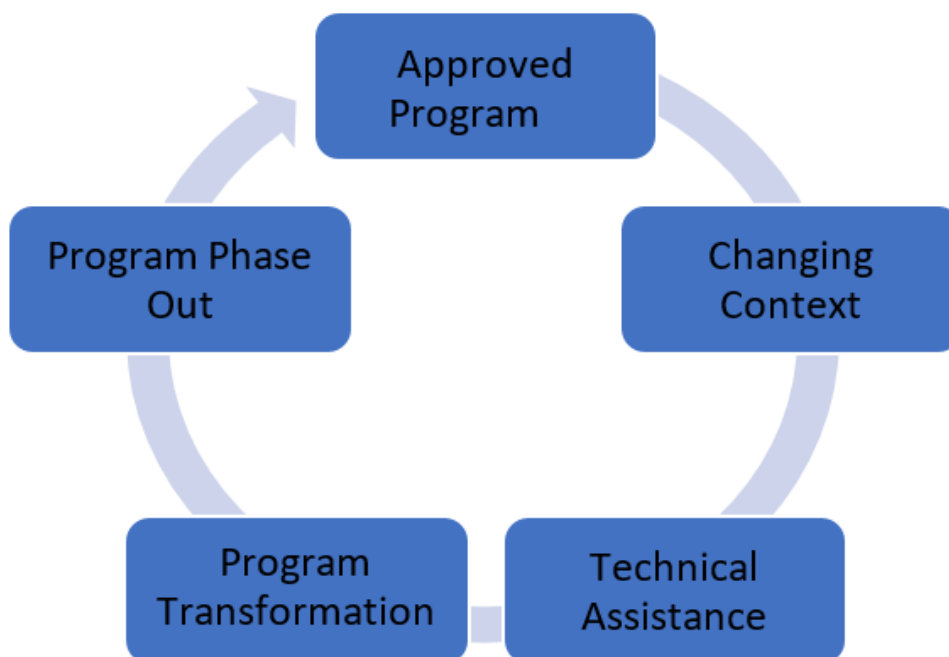
CTE POS (in-person, virtual, or hybrid)

- Are based on a skill set from the [Oregon Skill Sets](#)—which includes employability skills and the career cluster knowledge and skills—and link academic and technical learning.
- Include program content that aligns with local needs beyond employability skills and the career cluster skills.
- Culminate with the learner’s opportunity to earn an industry recognized credential.

- Are taught by a teacher with the appropriate CTE license at the secondary level.
- Meet local needs determined by a needs assessment through intentional conversations with partners and advisors from business and industry, secondary, and postsecondary.
- Offer work-based learning opportunities.
- Provide student leadership opportunities.
- Intentionally recruit and provide access to all learners.
- Provide learning opportunities for CTE educators to continue to hone their knowledge and skills within their career area, acquire inclusive teaching practices, and learn other needed professional skills.
- Include industry engagement.

6.6 CTE Program Quality

Oregon has adopted the [Advance CTE Program Evaluation and Intervention Guide](#) to assist the state, CTE regional coordinators, and local CTE POS.



ACTE cycle of program review, improvement, transformation, and closure. [Adapted from page 2 of the Advance CTE Guide.]

The optional use of the Advance CTE Guide provides an opportunity for locals to determine if CTE programs are high quality and aligned with the labor market demand. There are several options once the determination is made.

1. Improve CTE Program Quality Through Technical Assistance

Assuming the CTE program is still aligned to labor market needs, CTE program quality will require examination to determine the cause of poor learner outcomes. Following the examination, a specific action plan should be developed which includes the specific improvements to be made, actionable targets, and needed supports. The plan should then be regularly monitored.

2. Transform CTE Program to Gain Relevance

The relevance of the CTE program may evolve over time. This can be due to changes in the labor market or declining interest and lack of learner enrollment. CTE program transformation is often hard work and can take multiple years. It takes commitment on the part of local administration and industry. Again, an action plan would be used for the transformation.

3. Phase Out CTE Programs that are Low Quality and No Longer Relevant

CTE POS are, by definition, highly responsive and able to adjust to learner interest, industry demand, and community desires. Some CTE programs, as part of their natural life cycle, may need to close. CTE program closure decisions may be made locally, or in consultation with ODE/HECC/CCWD staff, during the CTE Program Renewal process. When such a decision is made, there must be a high level of sensitivity to the staff, the learners currently enrolled, and the connected industry. When preparing to phase out a CTE program, please work closely with your CTE regional coordinator and state agency staff to gain the necessary buy-in and support for the closure. There are specific administrative steps that must be taken regarding any Perkins funded CTE programs that are closed (see [Section 6.10](#)).

Oregon adopted a [CTE Program of Study Quality Rubric](#) built around the six core elements and aligned them to the national Association for Career and Technical Education's (ACTE) HQPOS framework; [Oregon Equity Lens](#); [Program Size, Scope, and Quality](#); and the [Work-Based Learning Rubric](#). This rubric is a tool to help educators and administrators evaluate the health of their CTE programs. The rubric should be used during program renewal to create goals for program improvement and could be used more regularly for continuous improvement.

6.7 CTE Program Approval

While secondary and postsecondary CTE providers have considerable flexibility in designing curriculum and assessments, state approval is required to qualify programs for federal and/or state funding. The CTE program applications display how programs will align offerings with labor market needs; meet state-defined criteria for size, scope, and quality; address all of Oregon's six elements of a POS; and continuously improve CTE offerings using the HQPOS Quality Rubric.

The CTE program applications must be completed and submitted in ODE's [CTE Information System](#), whether a start-up, a new (full) approval, or a renewal. School districts must work

together with their local [CTE regional coordinators](#) when they are ready to start the application process for any developing or renewing CTE program.

The CTE program application and approval is a small part of the more extensive program design process intended to help Oregon high schools and community colleges support and prepare learners with industry-based technical and academic knowledge and skills needed for success in secondary and postsecondary education and high-wage, in-demand careers.

ODE's [Guide for Secondary CTE Program Applications](#) is a step-by-step guidance document that walks applicants through the process of completing and submitting the CTE program applications.

6.8 Statewide CTE Program of Study Framework Development Process

In 2021, ODE began the process of creating statewide CTE POS frameworks for all 17 career clusters. [Education Northwest](#) (Ed NW) was hired to develop the first group of statewide frameworks for four career clusters. The process for creating the first round of statewide framework templates created by Ed NW will be emulated to develop all statewide CTE POS by 2025. During the program design process, the partners of a CTE POS must determine whether the design will follow the template for a CTE statewide POS or comprise one of Oregon's Knowledge and Skill sets while adding locally developed aspects to meet a specific local need.

The new statewide CTE POS 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 POS may be offered at the cluster or focus area level. Cluster-level POS offer learners in high schools a broad overview of careers in the field, along with skills valued by all industry partners. Focus area POS offer learners more occupationally specific training that may lead to industry recognized certificates and degrees.

The initial 2021 statewide framework efforts are based on statewide labor market information for high-wage, in-demand occupations. Statewide models continue developing, and over time 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.

Phase One

Ed NW will facilitate career cluster-based business and industry partner groups for the purposes of revising/validating the skill sets specific to the identified CTE Career Clusters. These four career clusters were updated during 2021-2022 and will continue in the cycle identified in the chart below.

Phase Two

Ed NW will engage college and other postsecondary partners in conjunction with business and industry partners for each of the four career clusters to create statewide CTE POS templates.

Phase Three

Ed NW will facilitate calibration sessions with ODE, CCWD, and regional coordinators. They will then facilitate secondary/postsecondary stakeholder discussions for the statewide CTE POS templates.

Phase Four

Ed NW will facilitate the development and approval of statewide CTE POS with school personnel and regional coordinators that follows the guidance of each of the four statewide POS templates.

Phase Five

Ed NW will meet with ODE/CCWD and regional coordinators to recap the project and outcomes. They will facilitate a discussion to identify wins, hurdles, and opportunities for the next clusters.

Individual CTE Program Development and Application

During the design process, partners of a CTE POS must determine whether the design will follow the template for a CTE statewide POS—including one or more of the indicated focus areas specified in each career cluster—or be a locally developed program of study.

CTE Program Approval Cycle

All CTE POS will be on the same program development and approval cycle based on career cluster. Regardless of a program's expiration date at initial approval, all statewide and locally developed CTE POS will renew on schedule with the statewide renewal cycle for its associated career cluster.

During the 2023-2024 school year, regardless of previous renewal dates, all CTE POS in the four career clusters listed below will either submit a new statewide CTE POS application using the new templates, or a local renewal application using the new online application process. The process will be complete, and applications submitted, by June 30, 2024.

During the 2024-2025 school year, regardless of previous renewal dates, all CTE POS in the five career clusters listed below will either submit a new statewide CTE POS application using the new templates, or a local renewal application using the new online application process. The process will be complete, and applications submitted, by June 30, 2025.

Beginning Fall 2023	Beginning Fall 2024	Statewide Renewal Cycle
Career Clusters: <ul style="list-style-type: none">• Hospitality, Tourism & Culinary	Career Clusters: <ul style="list-style-type: none">• Human Services• Government & Public Administration• Finance	Career Clusters: <ul style="list-style-type: none">• Architecture & Construction• Business Management & Administration

Beginning Fall 2023	Beginning Fall 2024	Statewide Renewal Cycle
<ul style="list-style-type: none"> • Arts, A/V & Communications • Marketing • Engineering Technology <p>New Expiration Date: June 2024</p> <p>CTE Program Development Process: 2023 -2024</p> <p>Application Due: June 2024</p> <p>Begin Newly Approved CTE Program of Study: Fall 2024</p>	<ul style="list-style-type: none"> • Health & Biomedical Sciences • Agriculture & Food Systems <p>New Expiration Date: June 2025</p> <p>CTE Program Development Process: 2024 -2025</p> <p>Application Due: June 2025</p> <p>Begin Newly Approved CTE Program of Study: Fall 2025</p>	<ul style="list-style-type: none"> • Information & Communications • Manufacturing <p>Expiration Date: June 2026</p> <p>Application Due: June 2026</p> <p>Begin Newly Approved CTE Program of Study: Fall 2026</p> <hr/> <p>Career Clusters:</p> <ul style="list-style-type: none"> • Automotive & Heavy Equipment • Possible Transportation, Aviation & Aeronautics • Education • Law, Public Safety & Security • Natural Resource Systems <p>Expiration Date: June 2027</p> <p>Application Due: June 2027</p> <p>Begin Newly Approved CTE Program of Study: Fall 2027</p>

[New CTE Program Development](#)

[Section 6.5](#) described the importance of a Start-Up CTE program in the program continuum process. Schools or institutions wishing to begin development of a CTE POS should use the Start-Up CTE process. The first step is to contact the local CTE regional coordinator to begin developing program readiness.

After the online application is submitted and approved, the Start-Up CTE program will be included in the list of approved programs for the school year following application submission in the CTE Information System, which may trigger eligibility for Perkins fund support (subject to local/regional policies) as well as involvement in student leadership organizations described in [Section 7.5](#). Learners accumulating credits in a start-up program may also expedite program eligibility for Secondary Career Pathway funding when the program reaches full status.

6.9 CTE Program Dormancy

CTE program dormancy occurs when a decision has been made to stop offering the CTE program at the present time, although there is not a desire to permanently close the program. There are many reasons a school may decide to stop offering a CTE program; they may include any of the following:

- Inability to offer courses as planned in a particular semester
- Inability to decide about future offerings at the present time
- Loss of a licensed instructor

In the event a decision is made for a secondary CTE program to enter dormancy, ODE must be notified as soon as the decision is made using the [Dormant CTE Program Notification](#).

- Consortia members will work with the CTE regional coordinator when considering CTE program dormancy and the CTE regional coordinator will provide the notification to ODE.
- Direct grant recipients will directly notify ODE.

Once program dormancy is reported, it may remain dormant for up to three years. Dormancy must be reported by August 15 each year the program remains dormant, using the [Dormant CTE Program Notification](#). The justification for continued dormancy should include the controls in place to prevent loss of Perkins inventory and plans for reopening the program.

When it comes time for program yearly updates, no information needs to be submitted for the dormant program.

Additional Guidance is available regarding postsecondary CTE program closure at [Academic Program Approval for Oregon Community Colleges](#).

Renewal of Dormant CTE Program

When a program is reactivated, ODE should be notified as soon as possible so it can be removed from the list of dormant programs. CTE programs that are due for renewal while in dormant status must renew according to the established schedule.

In the event that the teacher selection is in progress, or if the program is using teaching capacity “borrowed” from another secondary program or postsecondary institution (e.g., community college), the process involves listing the designated teacher AND the regional coordinator/direct recipient coordinator in the teacher boxes AND providing an explanatory note in the information system.

Dormancy vs. Closure

The following clarification is provided when facing the decision of program dormancy or closure.

Dormant CTE Program of Study	Closed CTE Program of Study
Barriers currently exist that prevent offering an approved CTE POS AND There is the desire and planning to reactivate the program as soon as possible.	Barriers exist preventing the ability to offer an approved CTE POS AND There is no desire or plan to reactivate the program.
Follow CTE program dormancy guidance outlined above.	Follow CTE program closure guidance outlined below.

6.10 CTE Program Closure Guidance

For various reasons, schools and colleges may decide to discontinue specific CTE POS permanently. The staff at ODE and HECC/CCWD should be included as partners in discussions around the CTE POS closure as they may have ideas to assist; this is a serious step with difficult impacts on student learning opportunities, and should be carefully considered. Partners that should be included in this decision include secondary and postsecondary instructors, CTE regional coordinators, administrators, business and industry partners, advisory committees, families, learners, and CTSOs.

Program closure will also impact financial resources available. For example, the Perkins Basic and Reserve Grant—and in secondary schools, CTSO Chapter grants, Secondary Career Pathway funding, and other sources—will not be available for programming.

Program closure should not be used as a temporary step—it should be considered permanent. Occasionally, after a program has closed, the economic circumstances or industry needs will change, and a new program may need to be started. To start a program like the program that had been closed, the institution will need to begin the application process from scratch by considering needs identified in the Perkins required local and/or regional needs assessment and determining readiness. It may take three or more years to gain approval as a CTE POS.

In the event CTE POS are closed, the following must take place:

Perkins Eligible Recipient:

The Perkins Act requires any eligible recipient to have at least one CTE POS to receive any Perkins funding. If a school reduces their staffing and/or CTE program offerings to the point

where it no longer meets the definition of an Oregon approved CTE POS, it is no longer eligible to receive any Perkins allocation. (Section 134 of the Perkins V Act)

Perkins Eligible Investments:

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

It is understood that staffing and course offerings are still under consideration into the early fall. Currently, Perkins recipients are encouraged to plan their Perkins grant activities and budgets with the best information available. As always, if school opens and the scope of the CTE program changes, the budget and plan must be changed to reflect the actual activities and investments. (Electronic Data Gathering, Analysis, and Retrieval system/EDGAR 80.30)

Notification:

The following guidance should be used when a state approved CTE program is being eliminated and will no longer qualify as an approved CTE POS.

Notification of Partners:

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

Notification of CTE Regional Coordinator:

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

Notification of ODE:

ODE is the state agency responsible for the Perkins Grant and reporting, and it is therefore crucial to maintain contact with ODE during this time. Please provide a written notification to ODE when a CTE program is reduced and no longer qualifies as a Perkins CTE POS.

Distribution of Assets:

Definition of Assets:

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.

As referenced in this CTE POS closure guidance, assets are defined as any item (equipment, supplies, inventory, etc.) 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 ODE 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 Assets and Distribution:

Assets shall be used in the CTE program for which they were acquired as long as needed, whether the CTE program continues to be supported by federal funds. When no longer needed for the original CTE 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:

If the CTE POS no longer meets the HQ POS level but continues as an Elective CTE Program, the assets could remain in use by that program. If the CTE 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, the asset is under the control and responsibility of the consortium fiscal agent. Therefore, the consortium project manager must determine if the asset can be used in other state approved CTE POS within the consortium. This means the assets may be relocated to another school or district. If no state approved CTE POS needs the asset, the consortium may shift the use to other past or current federally funded programs. The consortium fiscal department should have a policy in place to regulate this distribution process.

Management of Assets:

Regardless of the status of CTE programs, the fiscal agent must have property management policies in place. At a minimum, until disposition takes place, a fiscal agent is required to meet the following requirements:

- Maintain a property record including description, serial number, funding source, acquisition date, cost of asset, location, use, and condition—and any ultimate disposition data, including date and method of disposal.
- Maintain a physical inventory that is reconciled with the property record at least once every two years.

- Maintain a control system to ensure safeguards to prevent loss, damage, or theft. Any loss, damage, or theft shall be investigated, and records of investigation kept with property record.
- Maintain property in good condition.
- If the asset is sold, records of proper sales procedures must be maintained. Contact ODE staff for guidance. (EDGAR 80.32(d))

Recordkeeping

Federal grant programs require that all financial records, including inventory records, be maintained for three years from the starting date specified in the grant award letter. (EDGAR 80.42(b)) Additionally, the Department of Administrative Services requires financial records to be kept for a minimum of seven years. Therefore, it is recommended that records be retained for seven years from the initial award date.

Data Submission

Data will need to be submitted for the final year of CTE POS operation.

Secondary Teacher Licensure

When CTE programs close, teacher licensure can be impacted. The Restricted CTE teaching license is issued to a teacher and the co-applicant district; it is connected to a specific CTE program within a specific school district. If the CTE program is cut, and the teacher moves to a new district with an approved CTE program in the appropriate career area, the new district may become a co-applicant with the teacher to continue with that Restricted CTE license. A teacher is eligible for annual renewal of the Restricted CTE license with completion of the Professional Development Plan (PDP) requirements. The teacher may continue with the remaining three-year requirements of the PDP, working toward a Preliminary CTE license; ODE may provide verification of completion for purposes of the renewal if the former employing district is unable to do so. In addition to completing other requirements of the PDP for a Preliminary CTE license application, the applicant needs to have only one year or the equivalent of teaching in an approved CTE program. (OAR 584-042-0031; OAR 584-042-0090) The Preliminary CTE and CTE Professional licenses are not tied to a specific district CTE program. Therefore, a teacher may fill a position in any district teaching in an appropriate CTE program for the license. (OAR 584-042-0036)

7 – Student Support Services

7.1 Career Connected Learning Overview

Oregon defines the stages of career development through a continuum of career connected learning, which provides a framework for career awareness, exploration, preparation, and training that is both learner-relevant and directly linked to professional and industry-based expectations.

Experiences and activities within the career domains may include:

Career Awareness (Learning about Work) – The learner experiences may include job shadows, career fairs, classroom speakers, and interactions with industry, business, and community partners at networking and introductory levels with low frequency of interpersonal contact which may or may not align with learner interests.

Career Exploration (Learning for Work) – The learner should experience informational interviews and career-focused investigations that deeply engage them in activities that connect the learner with business and industry partners and mentors based upon results from skill, aptitude, and additional interest assessments and surveys. The learner takes an active role in selecting and shaping the experience with their families/guardians, educators, counselors, advisors, and mentors who serve in a supportive role in order to build personal agency. The learner matches what they have discovered about themselves to potential career paths while engaging in goal-setting and academic and career planning.

Career Preparation (Learning through Work) – The learner experiences may include learner-run enterprise with partner involvement, internships connected to curriculum, cooperative work experience, and/or service learning through in-person, virtual exchange, or simulated experiences. Interactions with business, industry, and community professionals should seek to align with classroom instruction to support academic, technical, and professional skills for learners.

Career Training (Learning at Work) – The learner experiences may include capstone internship, clinical experiences, and/or registered pre-apprenticeship/apprenticeship programs. Interactions with business, industry, and community professionals support career training not only for the learner to attain educational credits and credentials while mastering skills, but also to benefit the workplace in developing a future workforce.

7.2 Career Exploration in CTE – Emerging Work

Career Exploration is called out in the [Oregon CTE State Plan](#) to focus on providing all learners with clear and concise information about the careers available in the state and expanding opportunities for learners to see themselves in a variety of career fields, including ones that may be unfamiliar. The goals in the CTE State Plan will address the development of a cohesive system of support for learners in career exploration that will be ongoing across critical transition periods of the learner’s development.

The goals in the Oregon CTE State Plan include

1. allowing Perkins funds to be spent in middle school so that learners can experience careers earlier by participating in activities linked to Career and Technical Education (CTE) POS.
2. developing aligned systems and supports for learners, counselors, advisors, employers, and others/community partners to support career connected learning.
3. building a scope and sequence for career exploration and development, supporting implementation of the scope and sequence by regional and local entities, mapping resources and assets, and integrating the scope and sequence with comprehensive school counseling programs and community college guided pathways.
4. providing K-12, postsecondary, and adult learners with systems of support and professional learning about career opportunities and the paths for entering those careers in Oregon.
5. providing work-based learning opportunities for educators and learners to support seamless transitions and career connected learning across the learning spectrum, from middle school through career.
6. working with Adult Basic Skills providers to strengthen the connections to CTE.

Progress on the goals is advanced by a network of Career Connected Learning Systems Navigators (CCLSN) who support the work of career connected learning. The CCLSNs are housed at each of the community colleges and work to maximize CCL efforts in their region and foster partnerships with a goal of expanding opportunities for learners and engaging all interested parties in the region. Information on the CCL Systems network and the CCLSNs can be found on ODE's [Career Connected Learning](#) web page.

Career connected learning can begin as early as preschool. Oregon's current efforts have focused primarily on middle school and high school awareness activities and CTE Work-Based Learning opportunities. There is a wealth of resources available on ODE's [Career Awareness and Exploration](#) web page. Check back frequently to find updates and support.

7.3 Work-Based Learning

Work-based learning is a focal point of Perkins V legislation and receives widespread mention in the [Oregon CTE State Plan](#). Work-based learning is a strategy in reaching goals on equity and access, career exploration, and HQPOS; it helps educators and counselors better understand the opportunities available in the workplace. Additionally, Oregon chose to measure and report the implementation of work-based learning in secondary schools as one of the state's federal quality performance measures. Work-based learning is an important part of reaching Oregon's vision and preparing learners for meaningful careers and life-long learning.

The Perkins Action team, in collaboration with partners in the field, developed a [Work-Based Learning Handbook](#) and [Work-Based Learning Rubric](#) that can be found on ODE's [Work-Based Learning web page](#).

Oregon's Perkins V Work-Based Learning Definition

Work-based learning is defined as structured learning in the workplace or simulated work environment that provides opportunities for sustained interactions with industry or community professionals that foster in-depth, first-hand experience of the expectations and application of knowledge and skills that are required in a given career field.

There are four criteria to meet the above definition:

1. Aligned with a CTE POS curriculum and instruction
2. Sustained interaction with industry, business, or community professionals
3. Experience takes place in a real or simulated workplace setting
4. Earning of credit or outcome verification

Oregon's CTE State Plan has identified the following six measurable work-based learning experiences for Perkins V:

1. Clinical | Practicum | Internship
A structured work experience involving specific occupational skills and development goals that may or may not involve the awarding of academic credit, and the expectation that the learner will demonstrate the skills necessary for entry-level employment and have the knowledge to make informed decisions about next steps in training or employee advancement.
2. Cooperative Work Experience (CWE)
Per HECC/CCWD, cooperative work experience (CWE) means the placement of learners by the college in a structured work-based learning experience that is directly related to their classroom studies and under the control of the college. The college instructor or supervisor visits the field work site regularly. Supervision toward achievement of college identified and approved learner learning outcomes and measurable learning objectives is also provided by the employer or other individual contracted to provide field experience. Each learner should have theoretical knowledge and/or practical experience in a relevant major field of study prior to being placed in a cooperative work experience. (OAR 589-007-0100 (17) **A cooperative work experience in a high school CTE POS** is a structured educational strategy that involves the placement or approval of placement of learners by an educational provider in a structured work-based learning experience that is directly related to their classroom studies, coordinated by the educational provider, and leads to the earning of academic credit. Each learner should have theoretical knowledge and/or practical experience in a relevant major field of study prior to being placed in a cooperative work experience.
3. Pre-Apprenticeship (PATP)
An Oregon State Apprenticeship and Training Council (OSATC) approved program designed to prepare individuals from underrepresented or underserved backgrounds to enter and succeed in a registered apprenticeship program. The program must have a documented partnership with at least one, if not more, registered apprenticeship

committee(s) attesting that pre-apprenticeship completers will meet the minimum reentry requirements, gain consideration, and be prepared for success in a registered apprenticeship program as a preferred applicant. (see OAR 839-011-0335)

4. School-Based Enterprise Experience (SBE)

Hands-on and virtual learning opportunities that provide practical learning experiences to reinforce classroom instruction. SBEs are managed and operated by learners as simulated work experiences. SBEs can take place in or out of school and must align with labor market demand and/or have business and industry mentorship.

5. Service-Learning (SL)

Structured, sustained learning experiences in organized community service projects that meet actual community needs while also being linked to classroom learning outcomes and career related knowledge and skills through a cycle of service and reflection. Learners design service-learning projects collaboratively with community partners.

6. Workplace Simulation (WPS)

Hands-on and virtual learning opportunities that provide practical learning experiences to reinforce classroom instruction. Opportunities are provided to participate in a variety of real-world, worksite activities and engage with business and industry to assist in understanding what it's like to work in the chosen career field. These experiences use a variety of technological tools and can take place in or out of school; they must align with labor market demand and have business and industry mentorship.

Perkins Program Quality Indicator: Participation in Work-Based Learning

Oregon adopted work-based learning as the Program Quality Indicator for Perkins accountability. This metric is measuring the number of CTE concentrators who participated in work-based learning during high school and who graduated from high school during the reporting year. It is important to note the following:

1. This is over the course of the entire high school career of the learner.
2. CTE concentrators are learners who have taken two or more credits in a single CTE POS.
3. At least one of those credits must be in intermediate or advanced level coursework.
4. The learner must have graduated high school.

Beginning with the 2020-2021 school year, learner participation in work-based learning experiences must be measured and reported in the Perkins Consolidated Annual Report (CAR). The measurement and collection processes are discussed in the data and accountability section of this guidebook.

Opportunities are provided at the state and local level to ensure CTE regional coordinators, school personnel, and employers design effective experiences for learners. Schools should reference the [Perkins V Work-Based Learning Handbook](#) and [Work-Based Learning Rubric](#) for more details on Oregon's WBL criteria and types. ODE's self-guided [Work-Based Learning Canvas course](#) includes short videos, guidance on high-quality work-based learning, tools,

examples, and activities to support the planning and continuous improvement of equitable WBL experiences. Professional development opportunities, webinars, WBL Office Hours, and other learning experiences occur throughout the year and are promoted through the WBL Canvas course and [Career Connected Learning Newsletter](#).

7.4 Flexible Learning

In Oregon’s CTE State Plan, the vision for Flexible Learning is described as follows:

All learners will benefit from flexible learning systems that allow Oregonians to gain necessary skills where and how it best meets their needs.

As educators in Oregon have experienced during the COVID-19 pandemic, education, learning systems, and conceptions of what it means to engage in learning all have shifted dramatically or been essentially rewritten. Collectively, we have been nudged or shoved into learning, thinking, and collaborating differently.

Often, the two terms—flexible learning and personalized learning—are used interchangeably.

The concept of flexible learning in Oregon is being reimagined. Educators around the state and policy leaders at ODE are actively engaged in assessing how learning needs to change in order to address emergent conditions and change. Typically, flexible learning refers to the ability to customize pace, place, and mode of learning. Some examples include credit for prior learning, proficiency-based credit, competency-based education, and accelerated learning programs. Flexible learning often deals with reimagining policy and removing barriers for learners to access learning from wherever they may be.

Personalized learning refers to customized learning for each learner’s strengths, needs, skills, and interests. Typically, learners will have a learning plan based on prior knowledge and learning style. Personalized learning represents varied instructional strategies that attend to pace and manner of learning.

The [Oregon CTE State Plan](#) focuses on providing the best opportunities for all learners to access high-quality CTE programming, however and wherever it best meets their needs. The following three goals focus on the development of a cohesive system of flexible learning for Oregon’s learners:

1. Incentivizing innovative approaches to creating multiple on-ramps and off-ramps to CTE programs in Perkins Reserve Fund Grants provided regionally
2. Supporting at the state level creation of online CTE POS in collaboration with Oregon virtual charter schools, rural schools, and others as appropriate while ensuring high-quality to broaden opportunities for learners to participate in and benefit from CTE
3. Supporting and sharing practices such as competency-based education, credit for prior learning, and accelerated learning

Ongoing work will be dedicated to building a system that provides learners with opportunities in an environment that ensures equity, access, and respect. ODE is working with collaborators to develop, launch, and evaluate various approaches.

7.5 Student Leadership Opportunities

Student leadership opportunities are one of the components of a HQPOS. All CTE POS must provide student leadership opportunities for learners, through either a formal Career and Technical Student Organization (CTSO) or locally developed opportunities.

In Oregon, there are currently eight State Board recognized chartered student leadership organizations—commonly referred to as CTSOs.

CTSO	CTE Program of Study Career Area Alignment
<u>DECA</u> prepares emerging leaders and entrepreneurs for careers in marketing, finance, hospitality and management.	Business and Management
<u>FBLA</u> supports student leaders preparing for careers in business, management, entrepreneurship, and technology.	Business and Management Arts, Information, and Communications
<u>FCCLA</u> helps youth make a difference in their families, careers, and communities by addressing important personal, work, and societal issues through Family and Consumer Sciences education.	Human Resources Business and Management
<u>FFA</u> prepares future generations to thrive, succeed, and be educated in the agriculture industry.	Agriculture, Food, and Natural Resources
<u>FNRL</u> develops learners’ potential for leadership, personal growth, and career success through Natural Resources Education.	Agriculture, Food, and Natural Resources
<u>HOSA</u> provides learners with a program of leadership and skill development to help them become better health science leaders.	Health Sciences

<p>SkillsUSA empowers learners to become skilled workers, leaders, and responsible citizens.</p>	<p>Industrial and Engineering Systems Arts, Information, and Communications Health Sciences Business and Management Human Resources</p>
<p>TSA enhances the personal development, leadership, and career opportunities of STEM learners.</p>	<p>Industrial and Engineering Systems Arts, Information, and Communications</p>

To become a State Board of Education chartered CTSO, the organization must solicit approval from the Oregon State Board of Education, providing evidence that the organization meets the criteria to be recognized in the state.

Criteria for Becoming a Chartered Student Leadership Organization

1. Instruction, Career Development, and Assessment
 - a. Integrates CTE curriculum, academics, and career connected learning with leadership development activities and provides documented evidence of that integration
 - b. Engages learners in personalized/flexible learning that extends individual learner interests beyond the traditional classroom, and goes beyond a single event, and may include opportunities for entrepreneurship
 - c. Uses student leadership activities as learning/assessment experiences
 - d. Provides opportunities for learners to network with other learners having similar career interests beyond their local school site
 - e. Provides a learner reward and incentive system to recognize and document learner achievement related to career connected learning projects and experiences, academic proficiency, and technical skill proficiency
 - f. Provides the context and multiple opportunities for learners to address the personal learning requirements of Oregon’s Diploma requirements:
 - i. Education Plan and Profile
 - ii. Personalized/Flexible Learning
 - iii. Essential Employability Skills
2. Community-Based
 - a. Provides opportunity for and documentation of active community and business partnerships
 - b. Demonstrates activities related to community involvement including service-learning, mentoring, internships, and other career connected learning opportunities related to the context of the leadership opportunity
3. Organizational Administration/Management

- a. Engages learners in the process of planning, designing, conducting, and evaluating the success of career connected learning activities
- b. Operates with a planned program of work for the school year
- c. Advised and managed by an appropriately licensed professional technical education teacher
- d. Uses a school or organization supervised accounting system for learner funds
- e. Maintains records of learner participation that may be accessed by the state

The Oregon [CTE Student Leadership Foundation](#) (OCTESLF) was formed to provide cohesion and consistency to the opportunities available for learners across Oregon. The foundation board comprises representatives from each of the chartered CTSOs, along with one ex-officio member each from ODE and HECC/CCWD.

[Locally Developed Student Leadership Opportunities](#)

If a CTE POS is not affiliated with a Career and Technical Student Organization, it needs to develop local student leadership opportunities. A CTE POS that is not able to offer opportunities for learners through a chartered CTSO, or does not have a formal CTSO with which to affiliate, must provide opportunities that meet the criteria described above. Descriptions of the locally developed student leadership opportunities should be documented in the Student Support Services comments section box for all new full CTE POS applications and renewal applications. See the Guide for Secondary CTE Program Applications/Renewals available on ODE's [CTE POS Application Resources](#) web page for more information.

8 – Business and Community Partnerships

8.1 Community Engagement

Communities form the larger education system that supports families and learners. Deepening relationships, partnerships, and engagement with communities is critical in order to achieve equitable outcomes and build healthy education systems. Community engagement is advanced by actions that

- address long-standing harm or impact that marginalized communities have experienced.
- respond to community-driven needs and knowledge.
- deepen schools’ connections with their communities through intentional, authentic, and frequent engagement of learners, families, educators, school and college staff, advocates, tribal partners, community-based organizations, business and industry partners, and elected leaders.
- cultivate and strengthen connections between community organizations, businesses, education service districts, tribal partners, community colleges, professional associations, and support service agencies to create a thriving educational ecosystem.²

In fall 2022, the CTE/Perkins community began utilizing the processes outlined in the *Aligning for Student Success—Integrated Guidance (IG)* to assure early and ongoing engagement. The engagement process will continue throughout the implementation of the locally/regionally developed plans. Engagement is not “one and done”—it should involve opportunities to feed back to the community to check for understanding and opportunities to fine tune plans.

Effective planning of the IG outlines the preparation and process requirements for community engagement for school districts and community colleges within a consortium. The [Community Engagement Toolkit](#) and supplemental materials are available to guide your work for more authentic engagement as well.

The [Comprehensive Needs Assessment Guide](#) will be the guide for postsecondary Perkins direct grant recipients.

8.2 Advisory Committee

A CTE POS Advisory Committee is a group of individuals whose experiences and abilities represent a cross section of an occupational area. Members champion diverse learner needs in their region, including the needs of learners who have historically experienced disparities in schools and community colleges. The voices of business, labor, industry, trades, economic development, community, and learners provide a comprehensive perspective to support learner success and economic vitality.

To meet the objectives of Perkins V and the Oregon CTE State Plan, secondary and postsecondary CTE POS (see [Section 6](#) for more details) should be engaged with community industry partners to help provide quality CTE programming to all learners, particularly learners who have historically experienced disparities in schools and colleges. Advisory committees provide input, guidance, and assistance in the development and implementation of the CTE POS

² Adapted from [Aligning for Student Success](#), Section 1.

and ensure it is providing relevant, industry-based instruction. A CTE POS consists of a coordinated, non-duplicative sequence of academic and technical content at the secondary and postsecondary level. One of the most critical characteristics of quality CTE programs is the strong relationships they have with their business and industry partners. Advisory committees are, in many cases, the most effective way to develop and strengthen collaborative partnerships and should be tailored to fit the needs of the CTE programs based upon their circumstances.

CTE POS are required to bring together industry and community partners using one of the following models:

- Local advisory committee (program level)
or
- Regional advisory committee (regional area could consist of a community college service district, ESD, workforce region, school district(s), CTE region, or other model)

A local advisory committee provides direction and guidance to administrators and instructors for a specific CTE program offered by a district or community college.

A regional advisory committee provides direction and guidance to administrators and instructors for multiple CTE programs within the same career area across multiple districts or community colleges. There is flexibility in the region an advisory committee covers; for example, a region could be a community college service district, an education service district, a workforce region, a collaboration across multiple school districts and colleges, a CTE region, or some combination of the above. ODE and HECC/CCWD encourage secondary POS to collaborate with their aligned postsecondary POS regional advisory committee. Postsecondary regional advisory committees must collaborate with interested aligned secondary POS. Additionally, POS with a local advisory committee model may send a liaison to the regional advisory committee to act as a conduit of information between local program(s) and regional business and industry partners.

Why Have an Advisory Committee?

POS are required to have an advisory committee (regional or local) providing feedback and support. Alignment between secondary and postsecondary programs and robust industry engagement are critical to the success of programs and the learners in them. Intentional and regular collaboration is necessary to provide a basis of skills and experiences that support all learners in their transition to a postsecondary experience and facilitate progression to career and further education and training in a chosen career area. Advisory committees are powerful tools to connect community members to academic programming and ensure programming is serving the needs of learners.

Advisory committees are designed to engage community partners in CTE POS and provide greater cooperation with the private sector by

- ensuring that CTE POS are aligned with current industry standards.

- supporting learners’ introduction to a career as well as advancement and entrepreneurial opportunities within that career.
- advising on employer needs tied to high-wage, high-demand careers.
- ensuring CTE learners engage with business and industry through equitable career exploration and work-based learning opportunities.

Advisory committees can provide advice on

- curriculum modification and metrics for evaluating learner skills based on industry standards and best practices.
- updates to facilities/budgets/learner competencies.
- purchases of new instructional materials and equipment.
- adoption of program-specific policies.
- relevant industry professional development opportunities.
- qualifications for new CTE licensure candidates per an Instructor Appraisal Committee (IAC) through Professional Development Plans, and continuous improvement efforts (secondary only).

Advisory committees advocate for CTE POS by

- fostering positive relationships between CTE educators, business/industry partners, and the community.
- promoting CTE to policymakers, including legislators and educational board members, and through various media options.

What are the Expectations for an Advisory Committee?

POS are expected to actively engage employer and educator partners to develop, enhance, and support the CTE program in a sustainable manner (see [HQPOS Rubric](#)). A high-quality advisory committee will have

- members involved in POS program design, development, implementation, evaluation, and continuous improvement.
- a minimum of five members, 60% of whom should be members from business, industry, and labor organizations.
- regular meetings at a minimum of two times per academic year, preferably at least once every six months. Meetings can be in-person, virtual, or hybrid.
- members representative of the community and learners served, including historically and currently underserved and under-resourced communities (see *Who Should Serve on an Advisory Committee?* below).
- CTE instructor participation. If a POS has a local advisory committee, CTE instructors shall attend the meetings of that committee. If a POS does not have a local advisory committee, CTE instructors shall attend the meetings of their regional advisory committee.
- records of the discussions that occurred during the meeting, particularly for decisions involving purchasing, curriculum, and professional development. Notes should include

what was discussed, who was involved in the discussion, and the outcome of the decision, if applicable.

- membership formalized by written agreements including expectations and responsibilities for being a committee member, as well as a commitment to nondiscrimination and equitable access for all learners in CTE programming.
- at a secondary level, members serving on Instructor Appraisal Committees (IAC) to evaluate a new CTE teacher’s education and work experience and make recommendations for professional development.

Programs should be prepared to share a list of committee members and documentation of committee activity during the CTE POS renewal/review cycle. If programs are not meeting the minimum requirements, ODE/HECC/CCWD can assist in developing a brief plan and timeline to address the expectations. The minimum requirements for a CTE advisory committee are as follows:

1. POS connected to a local or regional advisory committee
2. Committee consists of a minimum of five members
3. At least 60% of the members of the committee are from business, industry, and labor organizations
4. Committee meets at a minimum two times per academic year
5. Documentation of committee activity

Who Should Serve on an Advisory Committee?

Effective advisory committees are large enough to reflect the diversity of the community, yet small enough to be managed effectively. As stated above, the CTE Program Advisory Committees should have at least five members—60% of whom should be members from business, industry, and labor organizations, with recent, firsthand, and practical experience—who are engaged or working in an industry sector offered by the CTE program. Other members could also include:

- Learners
- Parents/guardians
- Academic and CTE instructors
- Administrators
- Career guidance and academic counselors

Representation on the committee should reflect the diverse populations within a local community, including people from currently and historically underserved and under-resourced communities. In alignment with the [ODE Equity Stance](#) and [HECC/CCWD Equity Lens](#), CTE advisory committees must make substantial efforts to include diverse business, industry, and community partners, including participants representing focal groups,³ such as:

³ In Perkins V, focal student groups are referred to as special populations. The decision to use “focal groups” was an intentional choice in the [Integrated Guidance](#) based on the historic decentering of underserved learners and families, and the decision in the Student Success Act in 2018 to center and make these people the primary focus.

- Black, Indigenous, and People of Color (BIPOC)
- People/individuals with disabilities
- Linguistically diverse populations, English Language Learners (ELL), people with limited English proficiency (LEP)
- Individuals navigating poverty, homelessness, and foster care
- Migrant learners or recent arrivers and their families⁴
- Incarcerated and detained youth
- Native Americans, American Indians, or tribal members
- LGBTQ2SIA+ learners and families⁵
- Nontraditional representation⁶
- Others who have historically experienced disparities in our schools and colleges

⁴ Learners who moved to Oregon or between districts in Oregon within the last 36 months in order for their family or themselves to pursue work as migratory agricultural workers or fishers.

⁵ Lesbian, gay, bisexual, transgender, non-binary, queer, questioning, two-spirit, intersex, and asexual. “+” recognizes that there are myriad ways to describe gender identities and sexual orientations.

⁶ CTE learners participating in a CTE POS that leads to employment in fields that are nontraditional for their gender. These programs are identified using national data.

9 – Educator Recruitment, Retention, and Training

At the heart of every CTE program are the educators. Without quality educators who build relationships with learners and support their journey through education to career, the quest to achieve improved outcomes across Oregon’s diverse learner population would be severely hindered. The recruitment and support of educators, mentors, counselors, and business and industry partners is an essential element of achieving the vision for CTE. Oregon is committed to addressing the challenges of educator shortages and building a diverse educator workforce through aligning systems of educator licensure and professional development.

In the [Oregon CTE State Plan](#), there are two main goals in this area:

- Improving the recruitment and retention of secondary and postsecondary CTE educators, including individuals in groups underrepresented in the teaching profession and those transitioning from business and industry
- Aligning systems of secondary educator licensure and initial and ongoing professional development to enhance access to business and industry experts and currently licensed teachers who want to add a CTE endorsement

Being a teacher in Oregon’s dynamic CTE classrooms is a challenging and rewarding career that requires a different skill set from that of the regular classroom. In addition to knowledge about teaching strategies, classroom management, lesson design, and the education system, CTE teachers also need to have content knowledge specific to the CTE program area they serve. To that end, in order to teach in an Oregon state approved CTE program, an instructor must have an appropriate CTE license and/or endorsement that is specific to the program career area.

Currently, all information regarding CTE Licensure can be found on the ODE [CTE Teacher Licensure](#) web page.

10 – Perkins Grant Funding Distribution

10.1 Current Year State Distribution and Allocations

The purpose of this section is to offer transparency to the Perkins federal grant state allocation and the distribution of that allocation to the sub-recipients. As specified in [Strengthening Career and Technical Education for the 21st Century Act \(Perkins V\)](#), funds allocated to the state are distributed among these three categories:

- A. **Eighty-five percent** of the total Oregon allocation is provided to eligible recipients through formula-based distribution called grant-in-aid.
 - a. **Eighty-five percent** of the grant-in-aid is provided to local eligible recipients through Basic Grants.
 - b. **Fifteen percent** is provided to local eligible recipients through Reserve grants.
- B. **Ten percent** of the total Oregon allocation is dedicated to state leadership activities and allocations for work with state institutions, focal student recruitment, and nontraditional participation and completion.
- C. **Five percent** of the total Oregon allocation is dedicated to state-level administration of the grant.

The funds allocated to the formula-based distribution category are split equally between secondary- and postsecondary-eligible recipients as described in the Oregon CTE State Plan. All funds that are not used in the fiscal year awarded are recaptured and reallocated through the formula. The current distribution and allocation information can be found on the [Perkins V Grant Awards](#) web page.

10.2 Perkins Funding Distribution for Grant-in-Aid

Eighty-five percent of the Perkins state allocation flows to the Oregon eligible recipients by formula distribution. The funds are considered to be grant-in-aid and are accessible through ODE’s Electronic Grant Management System on a reimbursement basis.

Secondary Formula: Section 131

The secondary formula is based on the most recent U.S. Census data for the population by school district of individuals aged 5-17, and those aged 5-17 in households in poverty. In the event of school district boundary changes, the formula is adjusted to accommodate the learner shift.

Thirty percent of the secondary allocation is based on the following:

- District population of individuals aged 5-17, compared to
- State population of individuals aged 5-17

Seventy percent of the secondary allocation is based on the following:

- District population of individuals aged 5-17 in poverty, compared to
- State population of individuals aged 5-17 in poverty

Results for each district are multiplied by the total secondary formula amount for Oregon from the federal allocation.

Secondary Formula: Section 132

The postsecondary formula is based on the sum of the most recent number of postsecondary Pell Grant and Bureau of Indian Affairs (BIA) assistance recipients. It compares the total number of unduplicated Pell Grant and BIA assistance recipients in the college to the number of Pell Grant and BIA assistance recipients in the state.

Funding for State Institutions

Two percent of the state leadership set-aside is dedicated to CTE programming in state institutions. According to Perkins definition, this includes adult and youth corrections facilities and the Oregon School for the Deaf (OSD). More information about CTE programming in these schools is in [Section 18](#) of this guidebook.

Consortia Allocations (Sec. 131 and 132)

A consortium of eligible recipients may be formed to operate joint projects that provide services to all public schools and institutions providing CTE and are of sufficient size, scope, and quality to be effective. The allocation to the consortium will be the sum of the allocation to each eligible recipient that is a member of the consortium. Further guidance on consortia is in [Section 11.2](#) of this guidebook.

Perkins Reserve Allocations

As mentioned above, 15% of the grant-in-aid is dedicated to the Perkins Reserve Grant. Reserve grants are made at the consortium level. More information about the purpose and parameters for the Perkins Reserve Grant can be found in [Section 12](#) of this guidebook.

In response to a Regional Educational Laboratory Program (REL) study showing a decline in programs and access in small/rural schools, the ODE Secondary-Postsecondary Transitions (SPST) team formed a small workgroup to look at ways to create more equitable access to CTE programs for learners in those regions.

After conducting a focus group and examining the data, the decision was made to set aside a small/rural funding supplement as part of the regional Reserve grant. The supplement will be distributed in the following manner:

- **Leadership Supplement:** Provide a baseline amount of funding (\$5,000) to the regional consortia that currently have the smallest total Perkins allocation. This will allow for a base level of the CTE regional coordinator salary, and free up more funds to go to local program development and improvement.
- **Travel Supplement:** Provide a travel supplement (\$15,000) for the three most geographically vast consortia to offset the additional costs associated with in-person collaboration and engagement.
- **Equalization Supplement:** Provide an additional supplement (from \$10,000-\$45,000) in an effort to equalize the total support available to improve learners' academic achievement. For this supplement, analysis was conducted of the amount per school, district, and POS each consortium received. These funds should be focused on priorities of the Reserve grant: equity and access, career exploration, and work-based learning.

A total package of \$445,000 was allocated for small/rural regions for the 2023–2024 school year. A workgroup will continue to explore more long-term, sustainable solutions.

The remaining Reserve grant funds will use an allocation formula based on secondary and postsecondary performance data. The allocation process begins by splitting the remaining amount (after the small/rural funding supplement) 50/50 for secondary and postsecondary components.

- Secondary uses a four-year graduation rate (Perkins IV was 4S1; Perkins V is 1S1) divided by the total secondary allocation.
- Postsecondary uses CTE certificate or degree completion divided by the total postsecondary allocation.

This provides a per learner rate that is multiplied back in for each district/institution. Reserve grants are made at the consortium level.

Allocation for Charter Schools

In Oregon, all charter schools are considered public schools. While a few charter schools are sponsored by the State Board of Education, most public charter schools are sponsored by local school districts. These charter schools fall under the same formula as described above. Charter school allocations will be calculated at the school district level and will be included in the total district allocation. Charter school operators may choose to include language in the charter contract to ensure equitable distribution of these funds. See [Section 16](#).

Allocation for Private Nonprofit Schools

Private schools are not eligible for an allocation. See [Section 19](#).

10.3 State Leadership Funds (Sec. 112; Sec. 124)

Perkins allows up to 10% of the state allotment to be used to implement the required and permissive state leadership activities described in Section 124 of the Perkins V Act. From the amounts set aside for state leadership, ODE, in partnership with HECC/CCWD, will do the following:

1. Conduct State leadership activities to improve CTE, which shall include support for
 - a. preparation for nontraditional fields in current and emerging professions, programs for focal students and other activities that expose learners to high-skill, high-wage, and in-demand occupations;
 - b. individuals in State institutions, such as State correctional institutions, including juvenile justice facilities, and educational institutions that serve individuals with disabilities;
 - c. recruiting, preparing, or retaining CTE teachers, faculty, specialized instructional support personnel, or paraprofessionals, such as preservice, professional development, or leadership development programs; and
 - d. technical assistance for eligible recipients.

2. Report on the effectiveness of such use of funds in achieving the goals described in the Oregon CTE State Plan, meeting the state determined levels of performance and reducing disparities or performance gaps.

According to the Perkins law, the following three set-asides from state leadership funds must be made:

1. Not less than \$60,000 and not more than \$150,000 of state leadership funds shall be available for services that prepare individuals for nontraditional employment.
2. An amount equal to not more than 2% of the state allotment shall be available to serve individuals in state institutions. See [Section 18](#).
3. An amount shall be made available for the recruitment of special populations/focal students to enroll in CTE programs, which shall not be less than the lesser of
 - a. an amount equal to 0.1% of the total set-aside for state leadership or
 - b. \$50,000.

The [Oregon CTE State Plan](#) identifies eight additional priority areas for leadership funds over the 2020-2024 school years. These areas are:

- State support for implementation of action plans contained in the Oregon CTE State Plan
- Development of statewide CTE POS frameworks
- Technical assistance and support for virtual charter schools to develop HQPOS
- Development of middle school career exploration and training
- Recruitment of focal students to CTE programs (required set-aside)
- Support for CTE programs for individuals in youth/adult corrections facilities (required set-aside)
- Continued partnership with National Association for Partners in Education (NAPE) to support nontraditional learner work (required set-aside)
- Professional learning for CTE educators to create inclusive learning environments and training programs focused on increasing diversity of CTE educators

Each spring, the [State Plan Implementation Team](#) will convene to consider proposals and determine which specific activities will be funded in order to further the efforts outlined in the Oregon CTE State Plan. Below are two projects being funded with Perkins Leadership funds.

Nontraditional Fund Use

The term “nontraditional fields” is defined in Section 3 of the Perkins V Act to mean occupations or fields of work for which individuals from one gender constitute less than 25% of the individuals employed in each such occupation or field of work.

The required set-aside mentioned above to prepare learners for nontraditional fields is used primarily to partner with the [National Alliance for Partnerships in Equity](#) (NAPE) to train educators and administrators in recruiting and retaining nontraditional learners. This year, funds are focused at the community college level to train staff as well as actively recruit nontraditional learners into high-quality community college CTE programs.

The Oregon CTE State Plan action teams continue to work to reduce barriers and ensure equitable learning environments leading to learner success throughout every aspect of CTE.

Leadership Fund Project: Virtual CTE Pilot Project

ODE has identified a need for specific CTE programming support for virtual charter schools. The online/virtual CTE pilot is a collaborative of CTE administrators from various online charter school education providers across the state. This pilot program does not include those charter schools that meet in person and reside with a consortium. In consultation with each other and ODE, these innovative partners have an interest in offering, developing, and providing CTE programming within their virtual school contexts.

Criteria for funding requires that 75% of the learners enrolled are from outside the home district of the charter school. Online/virtual schools with qualified CTE POS qualify for a base allocation of \$1,500 per HQPOS.

The role of the online/virtual CTE pilot participating school:

- Participating in monthly online/virtual CTE pilot meetings
- Continuing to advance approved CTE POS and/or submitting a new CTE program start-up or full application
- Participating in the implementation of the Perkins V local needs assessment to develop goals and funding priorities for the pilot
- Supporting the goals of the pilot in the implementation of HQPOS, including:
 - Developing common advisory boards
 - Developing a professional learning community for online/virtual CTE pilot instructors
- Maintaining a commitment to equity in CTE programs
- Submitting data and reports as required by Perkins V
- Participating in technical assistance and professional learning opportunities

Leadership Fund Project: Career Exploration Pilot Project

The Career Exploration Pilot Project began with four CTE regions and 26 middle schools across Oregon and has increased to over 260 middle and high schools in the expansion phase. The goal of the pilot project is to increase middle school learner engagement in relevant and engaging career exploration activities that provide insight into their skills, aptitudes, and interests, and can be used for coursework and pathways planning toward secondary, postsecondary, and workforce opportunities. Initial outcomes have been increased participation rates in CTE course-taking from middle to high school, improvement in transitions as learners set goals and affirm career path planning, increased learner and classroom connection to business and industry, and heightened collaboration between middle, high, and postsecondary partners.

Through the pilot project, participating schools have received and will continue to receive professional development on the use of career assessment tools; access to learner level interest and aptitude reports for educational and workforce use; support in the collaboration with business, industry, and chamber of commerce partners; professional networking opportunities; and access to a resource hub of career exploration tools.

Current and actively participating schools, and those now joining in the pilot project expansion, have been asked to

- incorporate the use of [YouScience](#) in their career exploration practices and activities following the established process for implementation of the project.
- align their current career information system/platform or develop an internal system by which it can accept and incorporate information from YouScience into career exploration activities and administrative decisions related to course offerings.
- collaborate across and in the education-workforce ecosystem to inform alignment and reinforce engagement of the YouScience system to support learners.

10.4 State Administration Funds (Sec. 112)

The term “administration,” when used with respect to an eligible agency, means activities necessary for the proper and efficient performance of the eligible agency’s duties and supervision of activities. Administration does not include curriculum/program development activities, personnel development, or research activities.

Not more than 5% (or \$250,000, whichever is greater) of the grant is reserved for state administration, which may be used for developing the Oregon CTE State Plan, reviewing local plans, monitoring and evaluating program effectiveness, assuring compliance with federal laws, and providing technical assistance.

The funds set aside for state administration are used for salaries and materials for agency staff performing administrative duties.

11 – Perkins Grant Recipient Roles and Responsibilities

Eligible Perkins recipients in Oregon may operate as a direct grant recipient or participate as a member of a CTE consortium. Direct grant recipients are a single eligible entity (e.g., school district or college) while consortia are made up of multiple districts and/or colleges that collaborate within a CTE region. There are subtle differences between the two. According to Section 131 of Perkins law (below), districts that would receive an allocation of \$15,000 or less are required to consort. Most of the districts in Oregon fall into this category.

A local education agency (school district) shall not receive an allocation unless the amount allocated is greater than \$15,000. A district may enter into a consortium for purposes of meeting the minimum allocation requirement. Sec. 131(c)

No postsecondary institution or consortium shall receive an allocation in an amount less than \$50,000. Sec. 132(c)(1)

11.1 Direct Grant Recipients

Certain Perkins recipients are eligible to act as their own fiscal agents and are referred to as direct grant recipients. Direct grant recipients are fully responsible for all aspects of the Perkins grant requirements. Secondary direct grant recipients will follow the requirements in the Integrated Guidance for their Perkins grant making. Postsecondary grant recipients will follow the process outlined in [Section 12](#) of this guidebook. During the 2022-2023 school year, there are 10 secondary direct recipients and five postsecondary direct recipients (listed below).

Secondary Direct Recipients

Beaverton School District
Central Point School District
David Douglas School District
Douglas County/Roseburg School District
Gresham-Barlow School District
Hermiston School District
Hillsboro School District
Medford School District
Portland School District
Salem-Keizer School District

Postsecondary Direct Recipients

Lane Community College
Portland Community College
Rogue Community College
Treasure Valley Community College
Umpqua Community College

Leadership Roles and Responsibilities

Below is a non-exhaustive list of roles and responsibilities of **both** secondary and postsecondary direct grant recipients (unless otherwise indicated).

- Provides CTE leadership for the district/college and collaboration with the local consortium
- Engages in authentic consultation with required community partners (and local secondary programs–postsecondary)
- Works with the CTE regional coordinator for POS development and evaluation
- Assists in the development of, and participates in, Perkins Reserve Grant activities

- Comprehensive local needs assessment
 - Secondary: Works with district and ESD staff to conduct community engagement and needs assessment process identified in the Integrated Guidance
 - Postsecondary: Leads the process for the college
- Provides leadership by facilitating planning process and all district/college activities
- Perkins application:
 - Secondary: Works with district and ESD staff to complete the integrated application and budget. Works with district and ESD staff to complete all reporting requirements
 - Postsecondary: Writes Perkins Four Year Strategic Plan, budget narrative, and Annual Report—including collecting all relevant data and information included in the report
- Plans and conducts grant activities in support of their strategic plan, including tracking outcomes
- Networks with relevant industry, workforce, and economic development councils and committees (e.g., local workforce investment boards, STEM Hubs, economic development commissions, etc.)

CTE POS

- Provides guidance and support in the development of new POS
- Conducts POS review using the HQPOS
- Ensures all POS administer an appropriate work-based learning activity
- Supports the engagement of industry advisory boards for all POS
- Gathers data and research for POS improvement
- Ensures alignment to academic and industry standards that lead to high-wage and high-demand careers
- Reviews, provides initial approval, and submits all POS applications to the area CTE regional coordinator
- Supports curriculum research and development

Budget and Financial Management

- Maintains fiscal responsibilities of Perkins Basic Grant (according to the Uniform Grant Guidance, all recipients of federal grant funds must have written policies related to federal funding associated with education per the Electronic Data Gathering, Analysis, and Retrieval system (EDGAR) – See [Section 14.20](#) - Required Local Policies)
- Processes all federally purchased equipment and professional development requests
- Consults on equipment and professional development requests
- Maintains asset inventory controls
- Facilitates/supports the research of new technologies and provides professional development opportunities to support their implementation in POS

Grant Management

- Maintains working knowledge of federal and state requirements related to CTE grants
- Communicates with ODE and/or CCWD education specialists

- May develop and manage other grants related to CTE

Professional Development

- Facilitates professional development (e.g., provides access to professional development opportunities)
- Develops and offers local CTE trainings (e.g., CTE teacher workshops, advisor outreach, integrating academics in CTE, technology training, etc.)

CTE Data

- Secondary:
 - Coordinates with ODE to support CTE data collection and submission districts, including training district/institution reporting contacts
 - Produces and provides CTE reports to school district administration and school boards or institutional administrators
 - Provides CTE data for other grants and reports outside of Perkins
- Postsecondary:
 - Coordinates with HECC/CCWD to submit federally required Perkins data
 - Produces and provides CTE reports to community college staff and instructors
 - Provides CTE reports to CTE regional coordinators
 - Provides CTE data for other grants and reports outside of Perkins

CTE Teacher Licensure (Secondary ONLY)

- Maintains relevant knowledge of CTE licensure rules and processes with the Oregon Teacher Standards and Practices Commission (TSPC) and ODE
- Coordinates with the CTE regional coordinator to conduct Instructor Appraisal Committees (IAC)
- Supports teachers seeking CTE endorsement
- Works with ODE to problem solve or facilitate the CTE license application process

Grades 9-14 Relationships

- Supports the relationships between secondary and postsecondary programs
- Supports activities that encourage alignment and articulation between secondary and postsecondary institutions
- Coordinates with secondary and postsecondary partners to establish collaborative activities, plans professional development, supports CTE outreach, problem solves challenges with alignment, etc.

State CTE Initiatives – Not Perkins funded (Secondary ONLY)

- Supports CTE Revitalization Grant activities as appropriate
- Secondary Career Pathway funding:
 - Reviews preliminary program data sets
 - Collaborates with the CTE content area specialists to verify and determine that qualifying programs lead to high-wage and high-demand occupations
 - In collaboration with the CTE program teacher, the school administration, and the CTE regional coordinator, assists with decision making about use of funds

- Problem solves with schools and teachers regarding use of funds
- Serves as a CTE resource for the planning and implementation of High School Success activities (Measure 98)

Other possible duties may include:

- Performs CTE lab safety reviews
- Performs facilities improvement consultations
- Prepares and guides districts through ODE Fiscal Monitoring process
- Serves on review team for Civil Rights Monitoring Visit

11.2 Consortia

The consortia model in Oregon has been leveraged for many years to ensure all areas of the state have leadership and funding for quality CTE programs and professional development.

For the 2023-2024 school year, there are 14 Perkins CTE Consortia in Oregon. Perkins V requires that no institution or consortium may receive an allocation that is less than \$50,000, and must join a larger consortium when this might be the case. Some eligible districts and colleges choose to participate within a consortium because of the benefits of a regional approach. Funds allocated to a consortium must be used only for purposes and programs that are mutually beneficial to all members and may only be used for programs authorized under Perkins V. [See Sec. 132, (a)(3)(B)]

<u>Name</u>	<u>Fiscal Agent</u>	<u>Districts</u>	<u>Comm. Colleges</u>
Mid-Willamette Education Consortium	<i>Chemeketa Community College</i>	22	2
Clackamas Technical Education Consortium	<i>Clackamas ESD</i>	10	1
North Coast Educational Consortium	<i>Clatsop Community College</i>	7	1
Douglas CTE Consortium	<i>Douglas ESD</i>	12	
Eastern Oregon CTE Consortium	<i>Malheur ESD</i>	38	
Central Oregon Perkins Alliance	<i>High Desert ESD</i>	23	2
Intermountain CTE Consortium	<i>Intermountain ESD</i>	12	1
Lane CTE Consortium	<i>Lane ESD</i>	16	
Linn-Benton CTE Consortium	<i>Linn-Benton Community College</i>	10	1

Multnomah CTE Consortium	<i>Mt. Hood Community College</i>	5	1
Portland Area CTE Consortium	<i>Portland Community College</i>	8	
South Coast CTE Consortium	<i>South Coast ESD</i>	10	1
Southern Oregon CTE Consortium	<i>Southern Oregon ESD</i>	11	1
Tillamook CTE Consortium	<i>Tillamook School District</i>	3	1

Consortia Requirements

A consortium operation agreement must be maintained on file at ODE and updated annually in October. Signed consortia operational agreements must be submitted with the annual application in June.

<p>Consortia Agreements A signed consortium agreement must be maintained on file at the Oregon Department of Education and updated annually.</p>	<p>Sample Consortia Agreement</p>
<p>CTE Consortia Handbook A CTE Consortium Handbook is strongly recommended.</p>	<p>Sample Consortia Handbook</p>
<p>Consortia Property The 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.</p>	<p>See Inventory Section 14.19.1</p>
<p>Procedure for Changing Consortium Membership A request to make changes to a consortium must be made in writing to the State Director of Career and Technical Education by February 1 for the upcoming school year.</p>	<p>Consortium Change Requirements</p>

[CTE Consortium Handbook \(Strongly Recommended\)](#)

The CTE Consortium structure utilized is a local decision, but processes and procedures of the consortium must conform to federal, state, and locally adopted policies. A consortium handbook is not a legal requirement, but is strongly recommended as it provides information about the governance and decision making process of the group and can also help answer many questions about the day-to-day operations. [Sample Consortia Handbook](#)

11.3 Regional Leadership and Coordination

Oregon has a long history of leveraging regional leadership structures to ensure teachers and learners are afforded consistency in the CTE experience. Each of the 14 CTE Regional Consortia in the state has a CTE regional coordinator employed by a local community college, ESD, or

school district to serve on behalf of the region, and they are responsible for Perkins Consortia Basic and Reserve Grants. Below is a non-exhaustive list of roles and responsibilities of a CTE regional coordinator:

- Provides leadership to the Perkins region and Perkins consortia
- Collaborates with local colleges, districts, and ESDs in facilitating community engagement and needs assessment activities as related to CTE
- Provides labor market information to regional secondary and postsecondary CTE leaders
- Convenes member districts/colleges to determine regional needs and priorities for the Basic Grant application
- Provides leadership to Perkins consortia by facilitating all regional activities
- Writes Perkins Basic and Reserve Grant, budget narrative, and strategic plan
- Plans and conducts grant activities in support of their strategic plan, including tracking outcomes
- Submits required quarterly and/or annual reports
- Networks with relevant industry, workforce, and economic development councils and committees (e.g., local workforce investment boards, STEM Hubs, economic development commissions, etc.)
- Collaborates with all Perkins eligible secondary and postsecondary schools—**including nontraditional schools**—located within the region that generate some portion of the funds available to determine need and activities within Reserve grant
 - This includes online/virtual schools and youth correctional facilities. Learners in these schools/facilities still generate funds for each regional allocation. More information about working with these facilities can be found in [Section 17](#) and [Section 18](#), respectively.

CTE POS

- Provides guidance and support in the development of new POS
- Conducts POS review using the HQPOS
- Ensures all POS administer an appropriate work-based learning activity
- Supports the implementation of industry advisory boards for all POS
- Ensures alignment to academic, postsecondary, and industry standards that lead to high-wage and high-demand careers
- Reviews, provides initial approval, and submits all POS applications
- Supports curriculum research and development
- Assists and works with schools/districts and community colleges in conducting CTE Program Update
- Assists and works with schools/districts and community colleges in reporting and analyzing data, as needed

Budget and Financial Management

- Maintains fiscal responsibilities of Perkins Basic and Reserve Grants
- Processes all federally purchased equipment and professional development requests
- Consults on equipment and professional development requests

- Maintains asset inventory controls
- Facilitates/supports the research of new technologies and provides professional development opportunities to support their implementation in POS

Grant Management

- Maintains working knowledge of federal and state requirements related to CTE grants
- Acts as liaison between ODE, school districts, ESDs, and secondary and postsecondary institutions
- Communicates with ODE and CCWD education specialists
- Develops and manages other grants related to CTE

Professional Development

- Facilitates professional development (e.g., provides access to professional development opportunities)
- Develops and offers local CTE trainings (e.g., dissemination information at consortium meetings, CTE teacher workshops, counselor/advisor outreach, integrating academics in CTE, technology training, postsecondary topics, etc.)

CTE Teacher Licensure (Secondary)

- Maintains relevant knowledge of CTE licensure rules and processes with TSPC and ODE
- Conducts Instructor Appraisal Committees (IAC)
- Supports teachers/college instructors seeking CTE endorsement
- Works with ODE/CCWD to problem solve or facilitate the CTE license application process

CTE Data

- Coordinates with ODE and CCWD to support CTE data collection and submission for districts and colleges, including facilitating training for district and college staff
- Produces and provides CTE reports to colleges, school districts, and boards of directors
- Provides CTE data for other grants and reports outside of Perkins

Grades 9-14 Relationships

- Supports the alignment and relationship building between secondary and postsecondary programs
- Supports activities that encourage articulation between secondary and postsecondary institutions
- Assists in connecting secondary partners with postsecondary partners when an opportunity may not be available within the consortium region
- Coordinates with community college partners to establish collaborative activities, plans professional development, supports CTE outreach, problem solves challenges with alignment, etc.

State CTE Initiatives - Not Perkins funded (Secondary)

- Supports CTE Revitalization Grant activities as appropriate
- Secondary Career Pathway Funding:
 - Reviews preliminary program data sets

- Collaborates with the CTE content area specialists to verify and determine that qualifying programs lead to high-wage and high-demand occupations
- In collaboration with the CTE program teacher and the school administration, assists with decision making about use of funds
- Problem solves with districts, schools, and teachers regarding use of funds
- Serves as a CTE resource for the planning and implementation of High School Success activities (Measure 98)

Other possible duties may include:

- Performs CTE lab safety reviews
- Performs facilities improvement consultations
- Prepares and guides districts through ODE Fiscal Monitoring process
- Serves on review team for Civil Rights Monitoring Visit

Roles and Responsibilities of CTE Consortia Members:

- Provide information gathered through engagement and needs assessment activities to CTE regional coordinator for inclusion in regional Basic and Reserve grant application
- Participate in consortium as outlined in consortia agreement

11.4 Secondary Approval Process

In an effort to ensure consistency, the flow chart below has been developed to clearly articulate the flow of the secondary approval process for:

- CTE POS
- CTE Teacher Licensure
- CTE Program Update

The CTE regional coordinator serves as the gatekeeper for all secondary institutions in the region, including non-member districts, charter schools, and alternative schools. CTE regional coordinators are in a unique position at the intersection of many education, economic development, and workforce discussions, and their understanding of the region and specialized training will help maintain the focus and quality of the CTE programs.

The role of the CTE regional coordinator is to review the information to ensure the information is accurate, that it follows the appropriate requirements, and that it is of sufficient quality. If approved, the information will be passed on to the ODE education specialist (ed spec) for further review and approval. If the information presented is not approved by the CTE regional coordinator, it will be returned to the submitter for revision.

	Step One	Step Two	Step Three
Secondary Consortia Member Schools	Member schools collaborate with CTE regional coordinator on development then submit to ODE.	ODE ed spec will approve or return for revision.	N/A
Secondary Direct Recipients	CTE director works with schools on development. The information will be submitted to the CTE regional coordinator for review.	CTE regional coordinator will approve and send to ODE ed spec or will return to submitter for revision.	ODE ed spec will approve or return to CTE regional coordinator for revision.
Charter Schools	Charter schools are encouraged to work with the CTE director of the sponsoring school district on development. The information is submitted to the CTE director from the sponsoring school district. The CTE director will approve and send to the CTE regional coordinator or will return to the submitter for revision.	CTE regional coordinator will approve and send to ODE ed spec or will return to submitter for revision.	ODE ed spec will approve or return to CTE regional coordinator for revision.
Alternative Schools and Programs	Alternative schools and programs are encouraged to work with the CTE director of the sponsoring school district on development. The information is submitted to the CTE director from the local school district. The CTE director will approve and send to the CTE regional coordinator or will return to the submitter for revision.	CTE regional coordinator will approve and send to ODE ed spec or will return to submitter for revision.	ODE ed spec will approve or return to CTE regional coordinator for revision.
Online Charter Pilot Members	Charters submit to sponsoring district CTE director for approval or rejection. If rejected, return to the submitter for revision.	If approved, pilot project members submit to Margaret Mahoney for review	ODE ed spec will approve or return to CTE regional

	Step One	Step Two	Step Three
		and pass to ODE ed spec.	coordinator for revision.
State Institutions	Secondary schools and programs located in state institutions collaborate with CTE regional coordinator on development then submit to ODE.	ODE ed spec will approve or return for revision.	N/A

Each district receiving Perkins funds submits data for every school with a CTE POS in their district (regular high school, alternative program, charter school). These data are submitted directly through the website and will not be reviewed by the CTE regional coordinator. Throughout the collection cycle, ODE will notify the CTE regional coordinators of progress of the districts within their CTE region.

11.5 System of Support for CTE Leaders in the Field

Onboarding Support for All Coordinators:

Welcome Message

Once ODE learns of a staffing change, all new CTE coordinators will receive a welcome message to introduce the system of support, provide initial orientation information and resources, and point to the next support component(s). ODE staff coordinator: [Malinda Shell](#)

Perkins Boot Camp - For New Perkins Grant Managers

The Boot Camp is designed for all Perkins grant managers with less than 24 months in their position. The purpose of the Boot Camp is to provide the nuts and bolts information about the main aspects of grant management including fiscal responsibilities, application processes, program quality, and data submission. The format will be interactive and hands-on, allowing participants to utilize discussion and resources to find solutions and answer questions.

The Boot Camp intends to help new staff understand the basics and nuances of the Perkins Grant. The format will be topical with experts from ODE, CCWD, and the field offering information and examples. Additional support is also available in the form of monthly “Boot Camp Office Hours” facilitated by ODE staff. An ongoing Q&A document will also be created for future reference. ODE staff coordinators: [Dan Findley](#) and [Malinda Shell](#)

Additional Onboarding Support for Regional Coordinators:

Regional Leadership Academy

The Regional Leadership Academy is for new CTE regional coordinators with less than 24 months of experience. The purpose of the Leadership Academy is to work with participants to develop a deeper understanding of their role and to further develop the skills necessary to lead the regional CTE collaboration and improvement efforts.

The Regional Leadership Academy consists of six two-hour sessions from January through June to help new CTE regional grant coordinators dive more deeply into the work using a lens of communication and relationship development. The format will be topical, with experts from ODE, CCWD, and the field offering information and examples. ODE staff coordinators: [Margaret Mahoney](#) and [Malinda Shell](#)

Ongoing Support for all CTE Coordinators:

Bi-monthly CTE Coordinators Meetings - First Thursday, every other month

All grant coordinators—consortia and direct—will be invited to meet every other month to discuss current issues in state and national CTE. The primary focus will be on ongoing CTE program development and improvement to ensure strong outcomes for all learners. Agenda will be developed collaboratively. ODE staff coordinator: [Malinda Shell](#)

Professional Development

Information and training that is pertinent to all CTE coordinators is offered at regular intervals throughout the year and on an as-needed basis. ODE staff coordinator: [Malinda Shell](#)

Technical Assistance

Targeted one-on-one support and consultation via email, phone/Zoom, or in-person meetings is available on an ongoing basis from a variety of specialists.

Office Hours

Drop-in support via Zoom is available at regular intervals throughout the year.

Resource Development and Maintenance

Online resources will be developed, maintained, and made available to the field on an ongoing basis. ODE staff coordinator: [Malinda Shell](#)

Additional Ongoing Support for Postsecondary CTE Leaders:

Community College CTE Leaders

The Community College CTE Leaders is a statewide group of CTE deans, directors, and managers who meet on a quarterly basis to discuss and share information about CTE program support and services. The focus is on efforts to develop, grow, and sustain CTE programs offered by their colleges. The Perkins grant coordinator will be available to discuss relevant issues. CCWD staff coordinator: [Luis Juarez](#).

CCWD On-Site Visits

CCWD conducts annual on-site visits (virtual/non-virtual) to meet with Perkins/CTE postsecondary managers and provides technical assistance as appropriate. Discussions include progress on Perkins performance measures/indicators, local improvement plans, Traffic Light reports, Perkins/CTE program updates, college partnerships, Perkins V items, career guidance and planning, and evaluation and accountability. CCWD staff coordinators: [Luis Juarez](#) and [KC Andrew](#).

2023-2024 Meeting Calendar

MONTH	DATE	MEETING	NOTES
August	7/31 & 8/1	ALL CTE Coordinators Meeting	In-person (Lane CC)
October	TBD	ALL CTE Coordinators Meeting	In-person (Location TBD)
December	12/7	ALL CTE Coordinators Meeting	Virtual
February	2/1	ALL CTE Coordinators Meeting	Virtual
April	TBD	ALL CTE Coordinators Meeting	In-person (@ OR ACTE)
June	6/6	ALL CTE Coordinators Meeting	Virtual

11.6 Support and Consultation Model

This model outlines the Secondary-Postsecondary Transitions team’s process of support for resolving disagreements between CTE and Perkins decision-makers. It is intended to be used by CTE regional coordinators, school administrators of CTE programs, and district administrators of CTE programs, including charter school administrators and their sponsoring district CTE program directors. It is designed to provide a supportive and collaborative model of conflict resolution that prioritizes relationships between decision-makers and maintains their decision-making autonomy.

Step 1: Local Level Discussion

If you are a CTE regional coordinator and you have a disagreement with a school, district, or college CTE administrator’s decision on CTE or Perkins, or vice versa, we encourage you to discuss your concerns with the other party and resolve the issue informally.

Similarly, if a charter school and sponsoring district CTE program director disagree with a decision made regarding CTE/Perkins and cannot reach agreement, they should have a discussion that includes the school, the district, and the CTE regional coordinator.

Tips for conversation:

- Listen and try to understand concerns, interests, and the arguments from other perspectives.
- Examine concerns, interests, and arguments in context of written policies, agreements, and/or state and local law.
- As agreements are reached, write them down!
- If you are unable to resolve the disagreement at the local level, discussants should draft a summary of the attempts made toward resolution and the remaining issues that cannot be resolved.

- Remember that learner access to quality CTE programming is at the center of all we do.

Step 2: Consultation with Secondary-Postsecondary Transitions Team

Most problems will be resolved at the local level. In the event there are unresolved issues, please contact the appropriate ODE staff member (below) to initiate the next step of the support and consultation process. Other staff members will be assigned to proceed with this model.

- Licensure Issues – [Margaret Mahoney](#)
- POS Issues – [Carly Sichley](#)
- Fiscal Issues – [Reynold Gardner](#)
- Other Issues - [Malinda Shell](#)

The assigned ODE staff will review the information provided and check with the other party to ensure that the parties have attempted to resolve this disagreement between themselves first (all disagreements involving a community college partner will be addressed in consultation with a CCWD staff member). Upon verification that parties have attempted Step 1, ODE staff will schedule times to listen to each of the parties involved. During conversation, ODE staff will

- serve as a neutral party for disputants.
- listen to the issue.
- try to draw out the concerns, interests, and arguments to better understand the situation.

Following conversations with all parties, ODE staff will consider:

- Where do facts line up? Where do they differ?
 - If the parties' perception of the facts differ, what explains that difference?
- Are there points of agreement? Can they be expanded?
- Where are the points of disagreement?
 - What are the parties' explanations of those differences?
 - What are your feelings on those differences?
- What interests have the parties expressed?
 - Are there commonalities?
 - Can alternative positions be found that still align with interests?
- How does law and policy fit in?
 - Is this an area where parties can craft their own agreement, or does law/policy specify an outcome?
- What are some possible paths forward? Are there recommendations, examples, and other ways to move forward?
- In the event there is no collaborative solution and no legal/policy answer, what is the next step?
- Are there further conversations that need to happen?
- Does ODE have a decision or a recommendation?

After the ODE staff has carefully listened and considered the information, all of the parties will meet together for a facilitated conversation aimed toward resolution. There may be some cases

where resolution could be reached without bringing everyone together, but that will be clearly communicated at the time to those involved.

Step 3: Official Policy Decision

If parties cannot reach an agreement through the facilitated conversation in Step 2, *and* the issue involves a significant law or policy concern, the ODE staff member that has been working with the issue will consult with the appropriate CTE leaders at ODE and CCWD. An official decision will be made and delivered formally or informally. The ODE staff member will work with the CTE regional coordinator to strategize how to communicate the position to the school/district.

12 – Application Processes for Perkins Basic and Reserve Grant Funds

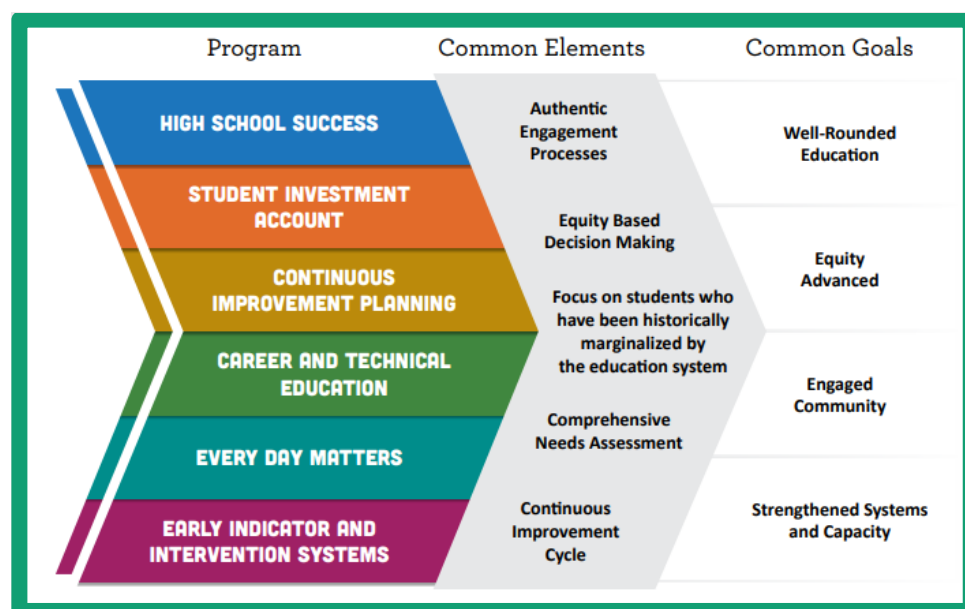
This section provides a high-level view of the timeline and steps involved in completing the Perkins application. The section begins with some information about the integrated application approach that ODE has implemented for the 2023-2025 biennium and provides braided supports for the various state and federal educational programs that have similar desired outcomes and timelines; you will also find a section for each type of Perkins Grant recipient (consortium members, secondary direct, and postsecondary direct). This section does not contain all of the rich information about how to conduct each of these steps, but there are links provided to the resources you will need.

12.1 Moving Toward an Integrated Approach to Application Development

The [Aligning for Student Success: Integrated Guidance for Six ODE Initiatives](#) has been referenced throughout the CTE Policy Guidebook. It is an opportunity for districts to plan for CTE and career connected learning as an integral part of their continuous improvement process.

The process requirements put forth in the Integrated Guidance provide more engagement and transparency to CTE programs and allow colleges and CTE consortia leads to help support and shape CTE priorities within their region beyond Perkins funding. It provides an opportunity for local and regional thought partners to spend more time analyzing how CTE programs are serving focal student groups and to braid local and regional initiatives to support strong CTE systems.

With the merger of Aligning for Student Success (Integrated Guidance) with Perkins, the Perkins application process will look and feel a bit different compared to previous years. While the integrated application applies to all school districts in Oregon, it will also create some changes for how colleges are engaged and access Perkins funds, and how CTE consortia plan their Perkins Basic and Reserve Grants.



The integration of these six initiatives is possible because of what they have in common.

While each program has historically been pulled apart, the Integrated Guidance brings them together so applicants, schools, and programs can leverage multiple strategies and funding sources to implement more cohesive plans that positively impact learners.

Historically, CTE has been an educational approach that is relegated to “that building out back” of the school; in other words, CTE has been siloed both physically and pedagogically. Now, Oregon adopts a robust CTE strategy that integrates the following goals:

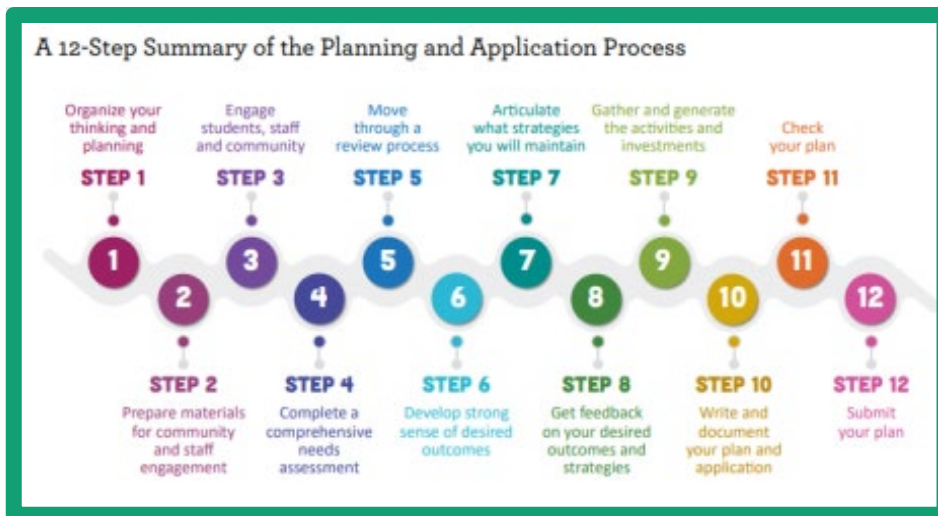
1. CTE provides a well-rounded education
2. CTE advances equity
3. CTE engages our community and business partners
4. CTE strengthens the educational system

There are two very deliberate reasons for this bold move.

1. **We want to improve outcomes and learning conditions.** Aligning the programs at the state level creates the opportunity and responsibility at the local level for schools, districts, and consortia to focus on planning and integrating programs and funding streams in ways that improve the well-being, health, climate, quality of instruction, and outcomes for each and every learner in Oregon, with dedicated attention to focal student groups.
2. **We want to make the right work easier.** This long-desired change has now begun. Working within existing statutes, rules, and federal requirements, ODE developed a framework for success that meets and retains the core purposes for each of the six programs while trying to create a stronger framework from which we can mark progress and look for long-term impacts. Overall, the initiative reduces the redundancy of effort and often uncoordinated attempts at engaging our communities.

The Integrated Guidance was published well in advance of the 2023-2025 application cycle to allow for thoughtful planning and engagement. Below is an excerpt from [Section 1](#) on the importance of planning:

These steps are presented to help leaders plan and sequence their efforts. In reality, all of these steps are interrelated and intersecting. For example, after an initial plan is developed and resourcing considered, additional community, student and staff engagement is best practice and would be valuable before finalizing submission of the plan. Even if all ideas and needs don't make a final plan, it builds trust and honors the input solicited to share back what is put forward in the final application.



These steps can ensure that you make the most of the opportunity to be more efficient, effective, collaborative and transparent as you bring your work together.

Moving from our traditional Perkins CTE planning and into the 12-Step Planning and Application Process is a natural progression. CTE consortia and colleges are also encouraged to go through the 12-Step Planning and Application Process. The Integrated Guidance offers strategies for creating and applying an equity lens, engaging community members, reviewing needs, determining intended outcomes, and budgeting with an eye toward achieving articulated outcomes. Below we have mapped the general Perkins application parts to the 12-Step Planning and Application Process found in the Aligning for Student Success/Integrated Guidance to demonstrate thoughtful and intentional alignment.

Ongoing, consistent, and authentic community engagement is vital to our improvement efforts and is at the heart of the shifts in Perkins V and our further shift into integrated planning. CTE teachers and leaders are familiar with engaging our community partners in our plans and as advisory members to our programs, but we are called to think more deeply about how to engage them.

“We cheer on bold new strategies and approaches that weave community engagement into the everyday operations of applicants, not just plan development and approval.”(Section 2, IG)

There are a number of resources available within the Integrated Guidance and on the ODE website—below are a few to get started:

- [Appendix A: Community Engagement Toolkit](#)
- [ODE Equity Decision Tools for School Leaders](#)

Perkins V Components	12-Step Planning and Application Process
Community Engagement	Step 1 - Organize and Plan Step 2 - Prepare Materials Step 3 - Engage

Needs Assessment	Step 4 - Complete Needs Assessment Snapshot
Plan Development and Application Budget Aligned to Identified Priorities	Step 5 - Review Process Step 6 - Develop Desired Outcomes Step 7 - Articulate Strategies Step 8 - Get Feedback on Outcomes and Strategies Step 9 - Generate Activities and Investments Step 10 - Write Plan Step 11 - Check Plan Step 12 - Submit Plan

With the inclusion of Perkins CTE in the Integrated Guidance, the process to complete these components is slightly different based on the type of grant recipient. Each is described at a high level in the table below.

Application Processes: Perkins Basic and Reserve Grants

Application Components	All Secondary	Consortia	All Postsecondary
Engagement with required partners	Required: Conducted within scope of district engagement in IG	Required: Recommend leveraging district engagement planning and results	Required: Conducted within each postsecondary institution
Needs Assessment	Required: Conducted within scope of district needs assessment in IG Results shared with CTE regional coordinator for use in regional application for Basic and/or Reserve funds	Required: Recommend synthesis of member district/college needs assessment	Required: Recommend using Postsecondary Comprehensive Local Needs Assessment Guide Results shared with CTE regional coordinator for use in regional application for Basic and/or Reserve funds
Plan, Application, and Budget Narrative	Required: Direct Perkins Recipients-fully embedded in district application	Required: templates will be provided by ODE for submission	Required: Direct Perkins Recipients-templates will be provided by ODE for college submission

	Perkins Consortia: CTE responses and outcomes may be evident in the district plan but no separate plan for Perkins funds		Perkins Consortia Members: No plan, application, or budget submitted to ODE
Quarterly and Final Reporting, Plan and Budget Adjustments	Direct Perkins recipients: Fully embedded in district reporting -all Perkins progress reports and budget adjustments will be done quarterly through the district's reporting dashboard	All Perkins progress reports, plan and budget adjustments will be done quarterly through the consortia reporting dashboard	Direct Perkins recipients: All Perkins progress reports, plan and budget adjustments will be done quarterly through the consortia reporting dashboard
	Perkins Consortia Members: No Requirements		Perkins Consortia Members: No Requirements

For current information, please visit the [Perkins Implementation 2023-2025](#) website.

12.2 Perkins Reserve Recipient

The Perkins Reserve Grant is embedded in the Consortia Plan and Application process. For the 2023-2025 Perkins application cycle, the priority focus of the Perkins Reserve Grant funds will be on the development and implementation of work-based learning and career exploration within the context of CTE POS.

The Reserve grant shall represent the need of the entire CTE service region including consortia members and secondary and postsecondary direct grant recipients that are not part of the consortium's Perkins Basic Grant.

The Reserve grant investments are intended for the benefit of the entire region and should not explicitly benefit a single school district or postsecondary partner. The Reserve grant should not purchase equipment and non-consumable supplies that would be inventoried and retained by a single school system. Again, the Reserve grant typically does not buy equipment and/or non-consumable supplies that are required to be inventoried.

13 – Perkins Data and Accountability

Data collection and reporting have been part of CTE since 1998. Specific indicators have changed over time, but the importance of using data to inform decisions has been consistent. Both secondary and postsecondary institutions routinely report program and learner engagement data as required components of their CTE programs; ODE and HECC/CCWD compile those data submissions into reports for statewide accountability and planning.

As part of the federal requirements, Oregon must report on specific performance indicators. The performance targets associated with them are set by ODE and HECC/CCWD in the [Oregon CTE State Plan](#) and accepted by the Office of Career Technical and Adult Education at the U.S. Department of Education.

Each performance indicator name is composed of three elements: the indicator series number, the education level code, and the in-series number. The education level code is “S” for secondary and “P” for postsecondary. Performance Metrics 1S1 and 1S2 are the first and second metrics in the 1S series, the first set of secondary performance metrics. Performance Indicator 1P1 is the first indicator in the 1P series, the first set of postsecondary performance metrics.

13.1 Accountability Processes

Perkins V provides a list of eight secondary and three postsecondary core performance indicators. As part of the Oregon CTE State Plan development process in 2018-2020, states were directed to establish how these indicators would be measured and how CTE participants and concentrators would be defined. Below are the adopted and approved operational secondary and postsecondary definitions for CTE learners and the core indicators that will be used to report data for accountability purposes.

Data reports are available for local accountability and planning. Described in detail in the CTE Data Reports Handbook, these reports provide disaggregated data by career cluster as well as by focal student group. According to Section 123(b) of the Perkins Act, local improvement plans are required under certain conditions.

The tables below display pandemic-adjusted secondary and postsecondary indicator targets for fiscal years 2020 through 2023. Targets factor in the change in definitions for secondary and postsecondary CTE concentrators and reflect analysis of available historical data.

Secondary Performance Metrics

Name and description	Adj. Target 20-21	Adj. Target 21-22	Adj. Target 22-23	Adj. Target 23-24
1S1 Four-Year Graduation Rate	89.5%	90%	90.5%	91%

1S2 Extended Graduation Rate	90%	90.5%	91%	91.5%
2S1 Reading/Language Arts Proficiency	68%	64.4%	72.9%	77.43%
2S2 Mathematics Proficiency	35.7%	34.4%	39.6%	42.75%
2S3 Science Proficiency	45.9%	44%	50.4%	54.15%
3S1 Post-Program Placement	49.3%	47.2%	55.8%	59.85%
4S1 Non-Traditional Prog. Concentration	27.5%	28%	28.5%	29%
5S3 Prog. Quality, Work-Based Learning	5%	12%	20%	25%

Postsecondary Performance Metrics

Name and description	Adj. Target 20-21	Adj. Target 21-22	Adj. Target 22-23	Adj. Target 23-24
1P1 Postsecondary Placement	62.8%	63.2%	67.6%	72%
2P1 Earned Postsecondary Credential	39%	39.4%	42.3%	45.2%
3P1 Non-Traditional Concentration	16%	16.4%	17.9%	19.4%

Attention to Equity

Perkins V requires disaggregation of data to review for potentially disparate impacts on different learner groups. Data are disaggregated by focal student group and by career cluster. Annually, disaggregated data are analyzed at the state and local level to determine gaps in performance and allow adjustment efforts to ensure learner success for all learners, particularly learners historically and currently marginalized in quality career education opportunities.

Ongoing examination of policies and data collection is needed to ensure learner progress toward meeting success indicators is not adversely impacted.

Data Literacy

The vision set forth in the [Oregon CTE State Plan](#) requires more in-depth use of data and feedback. In the Oregon CTE State Plan, there are three goals associated with data literacy and accountability:

1. Improve the use of data to inform continuous improvement in CTE with a specific focus on equitable access, participation, and outcomes for historically underserved learners.
2. Improve data reporting systems for various end users of the data.
3. Improve data quality.

Technical Assistance

ODE and HECC/CCWD offer ongoing technical assistance and a variety of timely workshops, webinars, and other training opportunities each year to help local personnel better understand data collection and processing.

ODE and HECC/CCWD staff are also available, upon request, to provide individualized technical assistance as capacity permits.

Data Confidentiality and Data Sharing

Federal and state policies require written documentation concerning sharing data that may include confidential and personally identifiable information (PII) concerning learners. Only those with a legitimate educational interest may receive and/or use PII and other confidential information.

CTE regional coordinators are recognized as authorized representatives with legitimate educational interest to receive data from ODE. Community college CTE leaders and CTE regional coordinators are recognized as authorized representatives with legitimate educational interest to receive data from HECC/CCWD. Those gaining access to data from ODE and/or HECC/CCWD that has PII are expected to adhere to the following expectations:

- Those granted access will have written permission from the employer and the school districts to obtain, view, and use the confidential information.
- Those granted access will adhere to the confidentiality and privacy laws and policies of the Family Educational Rights and Privacy Act (FERPA), the state, the employer, and the districts for which they will obtain data.
- Those granted access will provide access only to others that have a legitimate educational interest and who also understand and agree to follow the confidentiality and privacy laws and policies mentioned above.
- Those granted access will destroy and ensure others destroy confidential data when it is no longer needed to conduct evaluations and audits.
- Those granted access are expected to remain informed about privacy laws and policies.

Data Sharing Agreements

ODE offers a data sharing agreement to CTE regional coordinators to enable them to use data collected and reported for program improvement. The data sharing agreement is signed once and kept on file at ODE.

Improvement Plans

Section 123(b) of the Perkins Act states that ODE, in partnership with CCWD, shall annually evaluate the local levels of performance and the activities of each direct recipient and consortium.

In the event the local recipient fails to meet at least 90% of a performance target, Perkins requires, and best practice dictates, that they develop and implement a program improvement plan. The plan shall include an analysis of gaps and disparities, and actions that will address the gaps. The plan must be developed in consultation with the required local interested parties and must be developed for each performance indicator that does not meet the 90% threshold at the institution level.

In the event improvement is not made, there are provisions for escalated technical assistance and other subsequent actions.

In Oregon, the Improvement Plans are included in the Basic Grant application process. As part of the grant application, recipients are required to analyze their performance data and develop improvement plans for any performance indicators in which they did not meet the 90% threshold.

13.2 Secondary Performance Indicators

Naming Convention Reminder: The “S” in the name designates it as a secondary indicator. The Perkins V legislation defines a secondary CTE concentrator as a learner who has taken at least two courses in a single CTE POS.

A secondary CTE concentrator is a learner who earns at least two credits in a single CTE POS. One of those credits must be earned through a course or courses identified as intermediate and/or advanced.

Course-Level Descriptors

The secondary CTE concentrator definition includes a course-level descriptor. The descriptor emphasizes the importance of creating a course sequence within a CTE POS. National research has demonstrated the positive impact of CTE on learner outcomes when taught through a sequence of courses rather than a number of loosely connected electives. Under Perkins V, course-level descriptors are:

- **Introductory Course** – A course that focuses on raising career awareness and learning basic professional and technical skills associated with the CTE POS. The course helps develop learner interest rather than technical proficiency in a CTE POS.
- **Intermediate Course** – A course that focuses on exploring careers and learning specific technical and professional skills. The course builds on basic skills and moves toward technical proficiency in preparation for a career.
- **Advanced Course** – A course that focuses on preparing for a career and refining specific technical and professional skills. The course integrates multiple skills through project-based instruction and/or work-based learning. These courses focus on preparing learners for entry-level work or postsecondary programs.

Secondary Performance Indicators and Definitions

The [Oregon CTE State Plan](#) provides detailed indicator definitions, targets-by-year, and rationale for the chosen targets. Please consult the Oregon CTE State Plan for more details.

1S1: Four-Year Graduation Rate

*The percentage of secondary CTE concentrators who graduate within four years—*This indicator uses the same definition for a high school graduate as the one used to determine overall state four-year graduation rates.

Numerator: # of CTE concentrators who graduate high school (regular diploma, modified diploma, or post-graduate scholars), as measured by the four-year adjusted cohort graduation rate.

Denominator: # of CTE concentrators in the state’s adjusted four-year cohort in the reporting year. The adjusted four-year cohort includes learners who were first enrolled in high school four years prior to August of the reporting year, plus those learners who transferred into the cohort within these four years and minus those learners who transferred out of the cohort within these four years.

1S2: Extended Graduation Rate

*The percentage of secondary CTE concentrators who graduate within five years—*This indicator uses the same definition for a high school graduate as the one used to determine overall state five-year graduation rates.

Numerator: # of CTE concentrators who graduate high school (regular diploma, modified diploma, or post-graduate scholars), as measured by the five-year adjusted cohort graduation rate.

Denominator: # of CTE concentrators in the state’s adjusted five-year cohort in the reporting year. The adjusted five-year cohort includes learners who were first enrolled in high school five years prior to August of the reporting year, plus those learners who transferred into the cohort within these five years and minus those learners who transferred out of the cohort within these five years.

2S1: Academic Proficiency in Reading/Language Arts

*The percentage of secondary CTE concentrators who demonstrate proficiency in reading/language arts as measured by the statewide assessment—*These data are reported in the year that the learner takes the assessment. In Oregon, statewide assessments are administered during 11th grade.

Numerator: # of CTE concentrators who have met proficient or advanced level on Oregon’s reading/language arts assessment administered as part of the Every Learner Succeeds Act (ESSA).

Denominator: # of CTE concentrators who took the ESSA assessment in reading/language arts.

2S2: Academic Proficiency in Mathematics

The percentage of secondary CTE concentrators who demonstrate proficiency in mathematics as measured by the statewide assessment—These data are reported in the year that the learner takes the assessment. In Oregon, statewide assessments are administered during 11th grade.

Numerator: # of CTE concentrators who have met proficient or advanced level on Oregon’s mathematics assessment administered as part of the Every Learner Succeeds Act (ESSA).

Denominator: # of CTE concentrators who took the ESSA assessment in mathematics.

2S3: Academic Proficiency in Science

The percentage of secondary CTE concentrators who demonstrate proficiency in science as measured by the statewide assessment—These data are reported in the year that the learner takes the assessment. In Oregon, statewide assessments are administered during 11th grade.

Numerator: # of CTE concentrators who have met proficient or advanced level on Oregon’s science assessment administered as part of the Every Learner Succeeds Act (ESSA).

Denominator: # of CTE concentrators who took the ESSA assessment in science.

3S1: Post-Program Placement

The percentage of secondary CTE concentrators who, in the second quarter after exiting from secondary education, are in postsecondary education; are in advanced training, military service, or a service program; or are employed.

Numerator: # of CTE concentrators who, in the second quarter after exiting from secondary education, are in postsecondary education; are in advanced training, military service, or a service program that receives assistance under Title I of the National Community Service Act of 1990; are volunteers in the Peace Corps; or are employed.

Denominator: # of CTE concentrators who exited secondary education during the reporting year.

4S1: Non-Traditional Program Concentration

The percentage of CTE concentrators whose primary CTE programs and POS lead to fields that are nontraditional for the gender of the concentrator—These programs are identified using national data.

Numerator: # of CTE concentrators whose primary state-approved POS leads to a field considered nontraditional for their gender.

Denominator: # of CTE concentrators who concentrated in a state-approved POS that is federally classified as being associated with a traditional gender.

5S3: Program Quality – Participation in Work-Based Learning

The percentage of CTE concentrators graduating from high school having participated in work-based learning

Numerator: # of CTE concentrators who participated in work-based learning during high school, and who graduated from high school during the reporting year.

Denominator: # of CTE concentrators who graduated from high school during the reporting year.

13.3 Postsecondary Performance Indicators

Postsecondary CTE Concentrator

The Perkins V legislation defines a postsecondary CTE concentrator as a learner who has earned at least 12 credits within a CTE program or POS or has completed the program if it is fewer than 12 credits. While this is a postsecondary indicator, there are many high school CTE programs that are tightly aligned to the college program, and learners can earn certificates from the college while still in high school. Oregon expanded the CTE concentrator definition to:

A postsecondary CTE concentrator is a learner who has earned at least 12 credits, of which nine program credits are CTE specific, within a CTE program or POS, or completed the program if it is fewer than 12 credits.

This definition, recommended by a workgroup of employers and educators, refines the Perkins V concentrator definition to align closely with the definition under Perkins IV with only one difference: Perkins V requires a concentrator to have earned at least 12 credits in a CTE program or POS; Perkins IV required a concentrator to have earned at least 18 credits in a CTE program or POS.

Postsecondary Performance Indicators

Note: the “P” in the indicator name designates this as a postsecondary indicator.

1P1: Postsecondary Placement

The percentage of CTE concentrators who complete a program and then continue in postsecondary education; are in advanced training, military service, or a service or volunteer program; or are placed or retained in employment.

Numerator: # of CTE concentrators who completed a program or POS and, at second quarter after program completion, remain enrolled in postsecondary training; are in advanced training, military service, or a service program that receives assistance under Title I of the National Community Service Act of 1990; are volunteers in the Peace Corps; or are placed or retained in employment.

Denominator: # of CTE concentrators who completed a program during the reporting year.

2P1: Earned Recognized Postsecondary Credential

The percentage of CTE concentrators who received a recognized postsecondary credential during participation in or within one year of program completion.

Numerator: # of CTE concentrators who received a recognized postsecondary credential during participation in or within one year of program completion.

Denominator: # of CTE concentrators who left postsecondary education in the prior reporting year.

3P1: Nontraditional Program Concentration

The percentage of CTE concentrators from underrepresented gender groups who participate in CTE programs and POS that lead to fields considered nontraditional for their gender.

Numerator: # of CTE concentrators from underrepresented gender groups who concentrated in nontraditional programs.

Denominator: # of CTE concentrators who concentrated in programs federally classified as associated with a traditional gender.

13.4 Data Reports

Public reports are provided on the [CTE Data](#) web page in compliance with requirements for public access to accountability information regarding Perkins. The terms 90% Report and Traffic Light Report have been used interchangeably; one may hear either term, but both refer to the same document. The data in the 90% report posted on the ODE website is aggregate data at the institution level for each indicator. The use of green, yellow, and red coding allows a visual indication of Perkins Status for each indicator. The Traffic Light reports on the public website use suppression rules to protect learner identity.

Disaggregated data are released to CTE regional coordinators and community college CTE leaders in a secure fashion. For ODE/CCWD to release the data, training must be administered, and assurances signed to protect this private learner information. Email is not secure and shall not be used to transmit any data that will either directly *or indirectly* reveal personally

identifiable information (PII), including summary data. A [Secure File Transfer system](#) allows confidential information sharing.

Secondary Level

The Career and Technical Education 90% report is released to CTE regional coordinators yearly and provides information to schools regarding their performance on a variety of metrics included in the performance indicators listed above. The metrics are to be used as an evaluative tool to assess the success of the program from a multi-pronged approach. The equity and diversity of programs can be evaluated using this data, and serve as a strong data source to be used by districts as they complete their Perkins needs assessments and make programmatic and funding decisions.

Additionally, the metrics are offered at the state, regional, district, school, and program level. Each metric is further disaggregated by a variety of demographics such as gender, race/ethnicity, learners with disabilities, economically disadvantaged, English Language Learners (ELL), and Section 504.

Postsecondary Level

The CCWD Education Team Research Analyst provides performance data in the form of a statewide Traffic Light Report Summary, a statewide Traffic Light Report Detail, and statewide CTE Pivot Tables to the community college CTE leaders. These reports help to assist with data exploration for program evaluation and improvement. In the event the postsecondary institution belongs to a consortium, the CC CTE leader should follow the institution's policy to share the pivot tables with the CTE regional coordinator for their region. Each winter, CC CTE leaders will receive a copy of these reports for their institution and a refresher on the training outlined below:

How to Use the Perkins Pivot Tables

General Guidance

1. Orient yourself with the pivot table and click around; explore and develop your understanding of the data.
2. If you do not know what something means, pull in a colleague and explore together.
3. Reach out to your Institutional Researcher(s) to help piece the puzzle together.
4. Reach out to the CCWD Education Team Research Analyst, [Kelly Zinck](#), if you still have questions after going through Steps 1-3.

Specific Instructions

1. Select a performance measure worksheet to examine.
 - a. Click on the worksheet tab at the bottom of the Excel screen ("2P1").
2. Get a feel for the "who" and the "when" of the performance measure by referring back to the Definitions tab and checking:
 - a. Which group of learners the performance measure uses:
Participants or Concentrators
 - b. Which program year learners are selected from:
Previous year or Current year

3. Do a “gut check” or literal check of how many learners are included in the performance measure, and if that seems accurate to you:
 - a. Example using 1P1: “Do I have seven CTE concentrators from nontraditional gender fields participating in the Agriculture, Food, and Natural Resources career cluster? Does that number look right to me? What do my records say?”
 - b. If the number of learners in that group does not look right, double click on the number of learners and it will give you a list of CCWDIDs of who was included.
 - Double-check which year and dates apply to the learners in that performance measure.
 - Double-check the definition of the measure (numerator and denominator). It may include only a subset of concentrators (like those who left the next year) rather than all concentrators.
 - Work with your Institutional Researcher to figure out why some learners you think should be included may not be included.
 - If you have gone through all these steps, including talking with your research analyst, and still think there is a problem or you cannot figure out why your numbers do not make sense to you, please contact the CCWD Education Team Research Analyst, [Kelly Zinck](#). Please provide an example learner who you think should be included but was not included (or other questions you have). Detailed information on the program year, institution, etc., is also appreciated.
 - c. If the number of learners included in the measure looks accurate, move on to Step 4.
4. Dig into the Pivot Table data to find areas where you can improve.
 - a. To find the career cluster that is struggling the most (and dragging down performance on that measure), choose a cluster that has a high number AND high percentage of learners that do not meet the qualifications to get into the numerator.
 - b. Click the “+” to expand the chosen career cluster and show all the programs in that cluster.
 - c. If there are multiple programs in the career cluster, look for the program that is struggling by selecting the program that has a high number AND high percentage of learners that do not meet the qualifications to make it into the numerator.
 - d. Double-click on the chosen program.
 - e. Now you can choose the demographic factor that you want to look at in the program.
 - One demographic factor (e.g., “Economic Status”) will already be chosen for you.
 - You can see if there is a pattern or if a focal student group is struggling.
 - You are looking for a correlation, which is not necessarily causation. It may give you a place to start your inquiry (i.e., which demographic population you might want to target, if any).

- To change which demographic factor you want to examine, use the Undo function. Then double click on the chosen program and select a different demographic group (e.g., “English Language Status”).
 - Choose only one demographic subgroup at a time in order to have the cleanest examination of your program.
 - If you have multiple demographic groups checked, the pivot table will nest them in one another. It will become more confusing and you most likely do not have a large enough number of learners at that level to make the nesting meaningful.
- f. At any point, if you want to know who makes up those learners in a group you are examining, double-click on the cell with the number of learners. Their records will be pasted into a new worksheet tab that automatically pops up. This is how you can check your learner-level records against the ones used for Perkins reporting. (Use Report Check Digit Learner ID to match records.)

13.5 CTE Data Collections – Secondary

There are three distinct yet interconnected secondary CTE data collections each school year. In these collections, CTE sites and their associated school districts are the submitting institutions, and ODE is the recipient of the data.

Accuracy, including completeness, is very important in each of these collections, and errors in one may negatively impact other data collections’ correctness. Errors in the first CTE data collection of the year—the fall CTE Program Yearly Update—will interfere with data processing in the online interface when the same institution is submitting to the spring data collections (CTE Student and CTE Course) at the end of that school year.

CTE Program Yearly Update

This is the first of three secondary CTE collections. It is an annual collection designed to measure CTE POS size, scope, and quality data at the beginning of each school year. These data include CTE course sequences and supporting details on the elements that make a program high quality. All state approved CTE POS are required to participate in the program yearly update whether program changes are needed or not. Failure to provide updated program and course information during the program yearly update may lead to data submission inaccuracies and errors during the spring CTE Student and Course collections.

The [CTE Data Submitter Guide](#) provides details on completing the Yearly Program Update in the CTE Information System.

The CTE Program Yearly Update takes place in the CTE Information System application accessed through login to [ODE's District website](#).

CTE Program Yearly Update Dates

CTE Program Yearly Update Opens: the last Thursday of August

CTE Program Yearly Update School Submissions Due to RCs: the last Friday of October

CTE Program Yearly Update Submissions Due to ODE: the first Friday of December
CTE Program Yearly Update Closes: the second Friday of January

CTE Student Collection

CTE Student, the first of two spring data collections for secondary CTE, requires one row per learner grade 9 and up in the entire CTE site, regardless of whether the learner engages with CTE. Each row contains three types of data:

1. Learner enrollment data
2. CTE IRC data –applies only to some CTE learners
3. CTE WBL data –applies only to some CTE learners

CTE data elements such as program CIP codes are validated against information institutions entered in the CTE Information System.

The [CTE Data Submitter Guide](#) provides details on identification of learners who are versus those who are not required to be included in the CTE Student collection, as well as step-by-step data submission instructions for secondary CTE data preparers and submitters. The [Perkins V-Based Reports Handbook](#) describes how data collected in CTE Student are used to produce Perkins-required reporting and other data reports to Oregon schools and the public. The handbook also includes guidance on access to and interpretation of the Perkins V reports, such as the statewide Summary Traffic Light Report and the Perkins 90% Reports in the Achievement Data Insight application (on the [ODE District Site](#) via login).

CTE sites and school districts offering secondary CTE submit to CTE Student through the Consolidated Collections application accessed on the [ODE District Site](#). Each year’s CTE Student collection has its own Data Collection Detail web page—in the publicly available portion of the ODE District Site—that provides technical information and resource links for the data collection. Find the CTE Student collection page for the current or past years on the [SoDD \(Schedule of Due Dates\)](#) page on the ODE District Site.

CTE Course Collection

CTE Course, the second of two spring data collections for secondary CTE, requires one row per CTE course per learner for the applicable school year, regardless of whether the learner passed the course. Each row contains three types of data:

1. Learner enrollment data
2. CTE program and course data
3. CTE learner earned grade data

CTE data elements such as program CIP codes and course numbers are validated against information institutions entered in the CTE Information System during the CTE Program Yearly Update in the fall.

The [CTE Data Submitter Guide](#) provides CTE Course submission details including step-by-step instructions for secondary CTE data preparers and submitters. The [Perkins V-Based Reports](#)

[Handbook](#) describes how data collected in CTE Student are used to produce Perkins-required reporting and other data reports to Oregon schools and the public. The handbook also includes guidance on access to and interpretation of the Perkins V reports, such as the statewide Summary Traffic Light Report and the Perkins 90% Reports in the Achievement Data Insight application (on the [ODE District Site](#) via login).

CTE sites and school districts offering secondary CTE submit to CTE Course through the Consolidated Collections application accessed on the [ODE District Site](#).

Each year's CTE Course collection has its own Data Collection Detail web page—in the publicly available portion of the ODE District Site—that provides technical information and resource links for the data collection. Find the CTE Course collection page for the current or past years on the [SoDD \(Schedule of Due Dates\)](#) page on the ODE District Site.

13.6 CTE Data Collections – Postsecondary

HECC/CCWD is responsible for collecting data and providing reports on the postsecondary accountability measures for Perkins V. Data are collected through collaboration with Institutional Researchers at each college. For more information about the postsecondary data collection, contact [Kelly Zinck](#).

Learner Data Privacy and Security

Consortia, district and college staff may be given access to data and data tools that allow viewing of learner education records, or learners' personal identifiable data. Staff are legally obligated to ensure the confidentiality and privacy of these data, as well as keeping the data secured at all times. Learner education records are protected from release by the [Family Educational Rights and Privacy Act](#) (FERPA).

- FERPA
 - Protects the privacy of learners by restricting access to records that contain personally identifiable information (PII)
 - Does not permit the disclosure of PII from education records without consent, except under certain “exceptions”
 - Requires that “reasonable methods” be used to protect the integrity and security of the data being maintained at LEAs (local education agencies)
 - Does permit disclosure of certain types of PII which is considered *Directory Information*
 - Affords families and eligible learners the right to have access to their education records, and the right to seek to have those records amended

The Oregon Student Information Protection Act (OSIPA) regulates the use of learner personally identifiable data beyond any purpose for which the data has been provided for any online service or application, and requires specific security measures.

In short, data privacy laws exist to ensure that learner data are not disseminated publicly, and are protected throughout their use. It is the responsibility of consortia, education service

districts, and local education agency staff to be familiar with data privacy and to share private (disaggregated) learner data in an appropriate manner with authorized personnel only.

Learner-identifiable data includes any data or information that, alone or in combination, would generally allow a person to identify a learner with reasonable certainty and may include, but is not limited to:

- Learner demographic information
- Immunization and health records
- Disciplinary records
- Learner progress reports
- Grade point average
- Assessment results
- Attendance records

Summary data can be released, but only if aggregated to a level where the privacy of individuals is protected. This includes the release of directly identifiable data as well as data where the identity of individuals could be reasonably inferred through calculation. In Oregon, learner data are [suppressed](#) if the sample size is six or less.

To ensure individuals are securing data at all times, please refer to your *Information Technology* office for guidance. ODE is required to follow current [statewide information and cyber security standards](#) which cover all aspects of information security.

Access to Private Data

Under FERPA, education officials are allowed to access learner-identifiable data if those individuals require access to complete their work. Those individuals should be allowed access to learner data and sources. Consortia staff are responsible for managing and disseminating data and results properly.

Any personnel receiving or with access to learner-identifiable data should be trained on proper procedures for accessing, reporting, and handling private data. ODE policies related to handling personally identifiable data, and data classification which includes how each level of data should be handled, are located on ODE's [District Data Site](#).

Users of learner-identifiable data should do the following:

- Only access data within one's access rights unless given explicit permission to view
- Only access private data for legitimate consortium/educational purposes
- Utilize secure technology for transporting or sharing PII, such as [ODE's Secure File Transfer system](#)
- Lock up or destroy hard copies when not in use
- Not disclose learner-identifiable data to unauthorized personnel
- Immediately report inappropriately accessed or shared data

Data Use and Reporting

Printed reports with learner-identifiable data should be avoided as much as possible. When necessary, hard copies should be collected after their use and stored securely or destroyed.

Learner-identifiable data should not be included in presentations or publications shared with groups where the members do not have authority to view this data (e.g., advisory committees, workgroups that include members external to the institution, etc.). This includes the sharing of data within the consortium between secondary and postsecondary partners.

Care should be taken in preparing any public reports of data to ensure learner-identifiable data are not being shared. This includes reports like the APR, the local application, etc.

Computer and Software Requirements

Any computer that receives, houses, or is used to manipulate learner identifiable data must meet basic security requirements to ensure that private information is not released publicly.

1. Private data should be stored behind a secure firewall with password-protected access to only approved personnel.
2. Private data should never be stored or copied onto a transportable flash drive or other media. If regularly accessed via a local area network, copies should not be saved to desktop or laptop hard drives.
3. Data sharing, where required, should be limited so that only relevant data fields are transmitted.

The consortia staff should have readily available contact information for their institution's data privacy personnel in the event of the release of learner identifiable data. This person should be made aware in the event of the inappropriate release of private data so that necessary action can be taken.

Learner Data Privacy Resources

- [Oregon's District Site](#) has guidelines and resources to help protect learner data privacy
- [Family Educational Rights and Privacy Act \(FERPA\)](#)
- [Oregon Student Information Protection Act](#)

14 – Financial Requirements

14.1 Overview of Perkins Grant Resources

- As stated earlier, Congress reauthorized the Carl D. Perkins Act as the Strengthening Career and Technical Education for the 21st Century Act in 2018. This law—commonly referred to as Perkins V—went into effect July 1, 2019; following a transition period, full implementation of the law is in effect beginning July 1, 2020.
- As this is a federal grant, recipients must meet specific Perkins V requirements as well as adhere to general federal grant requirements. In addition to this guidebook, the following sources are examples of guidance that informs the implementation of Perkins V:
 - [The Strengthening Career and Technical Education for the 21st Century Act](#) (Public Law 115- 224)
 - [The Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards](#) (Uniform Grant Guidance) (2 C.F.R. Part 200)
 - [Education Department General Administrative Requirements](#) (EDGAR) (34 C.F.R. Parts 75-99), particularly Part 76 State-Administered Programs Part 99 - FERPA
 - Oregon CTE [State Perkins Plan](#)

Perkins Grant recipients are expected to effectively manage the many federal and state requirements associated with accepting a federal Perkins Grant award. This section of the guidebook provides a helpful point of reference for some common areas of Perkins Grant management in addition to the sources of guidance noted in the resources above. While ODE staff are available for technical assistance and can provide helpful references to guidance, the Perkins primary contact at each local grant recipient also serves as a subject matter expert for their organization and has a gatekeeping role to help ensure both strategic implementation of Perkins awards and compliance. Unless otherwise specified, Perkins Grant management topics included in this section pertain to both the Basic and Reserve grants.

14.2 Grant Type and CFDA Number

The Perkins CFDA number is 84.048. Perkins is primarily a reimbursement-based formula grant, distributed annually to eligible recipients by ODE. Reimbursements may be requested via the Electronic Grant Management System (EGMS) housed at ODE. Non-compliance with grant requirements may result in conditions on future grant awards and/or some grant reimbursement requests being deemed unallowable.

14.3 Grant Award Period

The grant award period is from July 1 through September 30 of the following year (15-month grant cycle). All expenditures, purchases, and deliverables must be completed during the grant award period. All reimbursement claims must be made by November 15 following the closing date of the grant.

Preliminary allocations will be available in the spring of each year. On July 1, 20% of the preliminary allocation will be available for expenditure. Once the local application and budget is approved, the remaining actual allocation will be available on October 1.

14.4 Period of Obligation

Funds must be obligated by the end of the fiscal year and according to definitions outlined in EDGAR (34 C.F.R. § 76.707) regarding when they are “obligated.” The chart below provides selected examples of these definitions.

Selected examples of when funds are obligated:

If the obligation is for:	The obligation is made:
Acquisition of real or personal property	On the date on which the local Perkins subrecipient makes a binding written commitment to acquire the property.
Personal services by a contractor who is not an employee	On the date on which the local Perkins subrecipient makes a binding written commitment to obtain the services. The work described in the contract must be completed by June 30.
Travel	When the travel is taken.
Rental of real or personal property	When the property is used.
Conference or event registration	On the date on which the local Perkins subrecipient makes a binding written commitment to attend the event.
Personal services by an employee	When services are performed.

14.5 Suspended and Debarred Service Providers

It is the responsibility of local recipients to check the [Excluded Parties List System](#) website to assure that any vendor with which they do business is not on this suspended and debarred list. This check should be explicitly and accurately documented in procurement records; otherwise, it is as if the check never happened.

14.6 Expectations of Perkins Grant

When utilizing Perkins funding expenditures in the local plan, the following expectations must be met:

1. The funding is for the purpose of development, implementation, refinement, or support of approved CTE POS.
2. Funding is allocable according to the Perkins V Act.
3. There is no supplanting. You cannot use federal funds to pay for staff, programs, or materials that would otherwise be paid for with state or local funds. In other words, the expenditure was not previously paid for with local funding.
4. The expenditure is reasonable and necessary for the plan’s execution.

14.7 Requirement for Local Use of Funds (Sec. 135(b))

Local use of funds must be tied to the CTE needs assessment and shall support CTE POS that are of sufficient size, scope, and quality to be effective and that

1. provide career exploration and development activities through an organized, systematic framework designed to aid learners, including middle grades, in making informed plans and decisions about future education and career opportunities.
2. provide professional development for educators involved with CTE, which can include support personnel, career guidance, and academic counselors.
3. provide within CTE the skills necessary to pursue careers in high-skill, high-wage, or in-demand industry sectors or occupations (consult local CTE administrators for details).
4. support integration of academic skills into CTE POS.
5. plan and carry out elements that support the implementation of CTE POS and that result in increasing learner achievement.
6. develop and implement evaluations of activities carried out with funds, including evaluations necessary to complete the CTE needs assessment and local reports.

14.8 Algorithm for Making Local Funding Decisions

When determining whether the use of federal Perkins V Grant funds is appropriate, local and consortia leadership should consider the following questions:

1. Does this use of funds constitute “supplanting” of other funding sources? For example, if an individual’s salary was funded through state funds previously, federal Perkins V funding cannot be used to fund the salary now or in the future unless the job duties have changed and have been documented in a revised position description. The position description must specify which duties are funded with Perkins Grant funds and what percentage of the overall duties are funded by federal Perkins Grant funds.
2. Is the expense reasonable? Does it meet the intent of size, scope, and quality as specified in the Perkins V law and in the Oregon CTE State Plan?
3. Is the expense necessary? For example, what are the consequences if Perkins funds are not used?
4. Is the expense allocable? For example, does the expenditure comply with the six required uses of funds specified in Section 135(b) of the Perkins V Act and with the Education Department General Administrative Regulations (EDGAR)? Be prepared to identify and describe the following specific considerations as they apply to the expenditure:
 - a. Which Perkins V required use of funds under Section 135(b) is being addressed?
 - b. How does the expenditure support the POS?
 - c. How does the expenditure support the recruitment, retention, and training of CTE professionals?
 - d. How does the expenditure support special populations/focal students as identified in Perkins V?
5. Does your comprehensive local needs assessment support the expenditure?
6. Has the expenditure been vetted with your district, college, or consortia governance team?
7. Is the focus of the expenditure on systems alignment and program improvement?

14.9 Allowable and Unallowable Costs and Activities

Allowability of expenditures - CFR §200.403

To be allowable, a cost must meet the following criteria:

- Be necessary, reasonable, and allocable
- Be consistent with policies and procedures of the Oregon CTE Policy Guidebook
- Be consistent with policies and procedures of the local educational agency
- Be adequately documented
- Be incurred during approved budget period (academic performance period - school year) = allocable

To understand whether an activity is allowable under Perkins V, local grant recipients should refer to Section 135 of the Perkins V Act, which outlines the types of items for which Perkins funds may be used at the local level. Additionally, the Uniform Grant Guidance provides insight as to whether specific purchases to implement the activities planned are allowable.

For example, it may be an allowable activity under the Perkins Act to teach learners in a culinary program how to flambé, which requires the use of alcohol. However, the Uniform Grant Guidance prohibits using federal funds to purchase alcohol, so that cost would ultimately be unallowable to the Perkins Grant.

Below is a general outline of guidance on allowable and unallowable costs and activities; however, it may still be necessary to refer to the source of the guidance noted earlier in [Section 14](#). All activities will need to be approved in the Perkins Budget Narrative in the local application.

Allowable Costs/Activities	Unallowable Costs and Activities
<ul style="list-style-type: none">• Costs associated with expansion of CTE POS into work-based learning (non-supplanting in nature)• CTE Interest, Aptitude, and Ability Inventories (with state approval)• CTE-related software (with state approval)• CTSO expenditures for newly chartered CTSO programs, 0-3 years• CTSO expenditures for re-birth of CTSO programs or a new teacher to a CTSO program, 0-2 years• Curriculum development/curriculum modification within POS (curriculum to be shared)• Curriculum expansion or supplemental resources, 0-3 years' investment	<ul style="list-style-type: none">• Administration costs above the 5% cap• Alcoholic beverages• Alumni activities• Basic classroom furniture• Basic classroom/CTE supplies (pencils, toner, ink, paper, bits, blades, measuring cups, pots, pans, screwdrivers, wrenches, wood, metal, welding electrodes, gas, resin, etc.). The local educational agency has the base obligation for offering a program.• Building maintenance and repairs• Bus or Metro Transport pass• Child care• College credit (tuition cost) to an individual learner or teacher/instructor• Commencement and convocation costs• Construction, renovation, and/or remodeling of facilities

Allowable Costs/Activities	Unallowable Costs and Activities
<ul style="list-style-type: none"> ● Equipment and upgrade to meet industry standards ● Expenditures for CTE career exploration and awareness down to the middle grades, including grades 5 through 8 (must be connected to a CTE POS at the secondary level) ● Marketing and outreach activities related to specific CTE POS (brochures, videos, flyers, web design), not school or college-wide promotion ● Meetings and conferences (registration fees, travel costs) related to CTE POS ● Membership dues/fees to a professional, service, or brotherhood organization that is connected to an explicit conference or professional development deliverable (seek ODE input) ● Professional development costs for CTE personnel ● Professional development related to CTE for non-CTE teachers/faculty/counselors (involved in CTE initiatives such as advising, academic technical integration, career awareness activities, and school administration) ● Professional service costs (consultants) ● Repair of equipment (with ODE approval) if the cost of the repair is of greater benefit than upgrading to new industry grade equipment. The local educational agency has obligations for equipment repair and maintenance. ● Subscriptions to industry-based software or resources ● Substitute pay for teachers, activities, and staff development related to CTE 	<ul style="list-style-type: none"> ● Consumable supplies ● Contributions and donations (cash, property, services) ● CTSO competitions ● CTSO expenditures to programs that are fully established ● CTSO uniforms ● Custodial service ● Entertainment – amusement and social activities (sports tickets) ● Expenditures for career education unrelated to Approved CTE POS (Career Education) ● Expenditures for non-approved CTE POS ● Expenditures that supplant ● Expenditures that generate income (food cart, coffee cart, student store set up costs, coffee machine, ice cream machine, vending machine, etc.) ● Fines and penalties ● Food, beverages, snacks, meals for CTE meetings ● Fundraising ● Gifts/gift cards ● Goods or services for personal use (laptop, phone, tablets, etc.) ● Individual awards, recognition, trophies, plaques, or gifts ● International travel including Hawaii and Alaska ● Items for young children to play with, manipulate, read, be entertained by, or eat, or sleeping items associated with an early childhood education POS. The POS responsibility is items for the secondary and postsecondary age learners and not facilitating a day care facility. ● Items retained by learners (supplies, computer equipment, thumb drives, tools, calculators) ● Keyboarding/typing instruction cost ● Landscaping ● Licensure and/or exam fees for individual (learner or teacher) certificate or licensure

Allowable Costs/Activities	Unallowable Costs and Activities
<ul style="list-style-type: none"> ● Supplemental Support Services for Perkins special populations/focal students ● Transportation costs incurred through professional development activities associated with approved CTE POS, workshops (administrators, counselors/advisors, CTE instructors, Perkins staff) ● Working lunch at CTE meeting with high burden of proof (seek guidance from ODE) 	<ul style="list-style-type: none"> ● Maker space (generic lab) that is open to the community and any students. Perkins labs need to be connected to a CTE POS and intended for CTE learners enrolled within the POS. ● Membership dues/fees for a professional, service, or brotherhood organization without being connected to professional development deliverables of attending a specific event. General membership year after year is not allowed (seek ODE input). ● Monetary awards ● Non-instructional furniture ● Political activities such as contributions, fund raising, or lobbying ● Promotional materials (T-shirts, pens, cups, key chains, book bags, etc.) ● Remedial (developmental) courses at both secondary and postsecondary levels ● Routine operating expenses ● Safety equipment (gloves, goggles, helmets, glasses, air filter, ventilation, lab/chef coats, boots, dust masks, etc.) ● Scholarships ● Learner expenses/direct assistance to learners (tuition, tools, fees, car repair, etc.) ● Learner stipends ● Learner transportation (state transportation fund covers a sizable portion of the cost associated with approved academic activities) excluding recreational/entertainment activities ● Security systems (cameras, locks, lock boxes, doors, deadbolts) ● Storage/shelving for instructional spaces (toolboxes) ● Subscriptions to periodicals, journals, and newspapers ● Teacher/instructor salaries ● Textbooks (local educational institutions have the base obligation for curriculum), toys, games, entertainment devices (video games), movies

Allowable Costs/Activities	Unallowable Costs and Activities
	<ul style="list-style-type: none"> ● Travel costs incurred for professional development located at resort/vacation destinations (seek ODE input) ● Tuition that is awarding college transcribed credits

If a specific investment or activity is in question, please reach out to the Perkins fiscal education specialist at ODE.

14.9.1 Program Income

Revenue/Program Income Generated through Perkins Investments (equipment/supplies)

There are times when programs earn income because of an approved CTE POS activity. Program income (2 CFR §200.307) means gross income earned by the recipient that is directly generated by a Perkins supported activity or earned because of the Perkins funds. This can include, but is not limited to, income derived from fees for services performed, the use of equipment purchased with Perkins funds, and the sale of items made because of a Perkins funded program activity.

The fiscal agent for the Perkins Grant must account for and credit program income to the CTE program of the school district or institution that generated the income. Those funds shall be used only for the program that generated the income. These funds must be used prior to the drawdown of Perkins federal funds. (2 CFR §200.307(e))

Expenditures Related to Program Income

CTE program activities encourage real-world entrepreneurial activities. Therefore, Perkins expenditures are allowed and encouraged to ensure learners receive a full range of experiences in the career area. There is a wide variety of CTE program areas that offer entrepreneurial activities for learners that involve Perkins program expenses and income generation. There is a difference between expenditures that provide career experience and expenditures that are geared primarily toward generating program income.

- If the intent of the purchase is to provide learner experiences in line with the skills set of the CTE POS, and income generation is incidental to the purchase, then those items will fall into the reasonable, necessary, and allocable evaluation (CFR §200.403) discussed elsewhere in this section.
- If the intent of the purchase is to provide learner experiences in line with the skill set of the CTE POS, and income generation is the primary purpose of the purchase, then ODE has set a cap on Perkins fund investment of \$600 for equipment associated with the income generating activity.

14.9.2 Allocable/Allocability

Allocable means the allocation of resources within a given grant period that benefits and meets the deliverables of the grant. For the state of Oregon, the Allocability Rule is that by December 1, all budgeted equipment and/or inventory items are in place and available for learner access to meet the learner learning outcomes. Additionally, any budget allocations and budget surplus equipment and/or inventory items are purchased in a timely manner to provide opportunities for learners to access within the academic performance period or school year, which typically would occur prior to June 30 annually. (CFR §200.405)

14.10 Supplement not Supplant

Section 211 of the Perkins Act states that Perkins funds “shall supplement, and shall not supplant, non-federal funds expended to carry out career and technical education activities.”

- Supplement means “to add to, to enhance, to expand, to increase, and to extend”
- Supplant means “to take the place of, to replace”

Educational institutions may use federal Perkins funds only to supplement, and to the extent practical, increase the level of funds that would, in the absence of the federal funds, otherwise be made available from non-federal sources for the education of participating CTE learners. Perkins funds are not used to replace any funds from other sources currently used to support CTE POS. Seek ODE/CCWD fiscal advice before proceeding with a questionable expense under this exception.

The base level support for a CTE POS is the obligation of the local secondary and/or postsecondary institution. Perkins is intended to enhance and expand the base level support of CTE POS.

14.11 Administrative Cost

Section 135(d) of Perkins V stipulates that each local recipient receiving funds shall not use more than 5% of the funds for costs associated with the administration of activities related to the grant. These grant administration charges may be direct or indirect and must be outlined in the local application. It is optional whether a local recipient decides to seek administrative cost recovery; however, the total direct administrative and indirect costs recovered cannot exceed 5% of the allocation. Additionally, the amount of administrative costs reimbursed is calculated based on the total grant funds actually expended, not on budgeted amounts included in the annual budget narrative.

Indirect Cost Rate (ICR)

Indirect costs are essentially the costs of overhead associated with managing a federal grant without the need to directly account for them in the budget narrative or annual report. The indirect cost rate helps ensure that local recipients electing to take it are compensated through one convenient rate for costs like office space for grant accountants, copies, grant accountant time, postage, writing the local application, etc. Indirect costs rates are negotiated and set at the agency level for districts and colleges.

For the Perkins Grant, the ICR cannot exceed the lesser of the recipient’s negotiated rate or 5%.

Direct Administrative Costs

Direct administrative costs are budgeted in the annual budget narrative; it is essentially a project that is not designated to a CTE POS. These costs must be built into the local application as individual expenses and would be reimbursed as such up to the maximum of 5% of grant funds expended. Personnel costs associated with managing the Perkins Grant would be part of the 5% allowance (note time and effort must be tracked for staffing expenses).

Costs associated with the comprehensive regional and local needs assessment process may, but are not required to, be considered direct administrative costs, and are also required to be detailed in the annual budget narrative section of the local application.

14.12 Repayment of Reimbursed Expenses

ODE reserves the right to request repayment of reimbursed expenses submitted that are not in the local application in any of these circumstances:

- Purchase causes the budget variance to exceed the 10% variance threshold described in [Section 14.21.1](#)
- Purchase is not an allowable Perkins expense
- It is not clear how the purchase supports the recipient's priorities and projects outlined in the local application
- It is not clear how the purchase relates to the results of the required regional/local needs assessment process
- Equipment was purchased that was not approved prior to issuance of a purchase order
- Documentation is insufficient to support payment
- Reimbursement is for travel or professional development that was not approved in the local application (such as international travel, Hawaii, Alaska, and/or travel that was recreational and not focused on deliverables of the Perkins Grant)
- Purchase represents supplanting of non-federal funds

14.13 Eligibility Exclusion Lists

(Sec. 135(b), CFR §200.328-329)

Eligible recipients that fail to complete the following items in an accurate manner, on time, may be excluded from Perkins V fund eligibility:

- Obtain approval for the Perkins V CTE Strategic Plan (four-year plan), Yearly Perkins application, Perkins Budget Narrative, and supporting documentation (local needs assessment)
- Submit a Perkins V Annual Report and all its related components by the designated date (November 15)
- Submit the local educational agency Perkins V program assurances
- Submit accurate CTE POS update and course data by the designated closing date
- Submit learner enrollment and performance data by the designated closing date
- Submit and obtain approval for applications for CTE POS

- Demonstrate that the use of Perkins V funds meets the purpose and intent of the Carl D. Perkins Act of 2018 and the [Oregon CTE State Plan](#)

14.14 Funding CTE Programs

To qualify for Perkins investments, all local educational agencies must have an approved CTE Program of Study (POS) within the specific career learning area. A POS is a seamless model that connects secondary to postsecondary CTE programming. The POS are built upon the same CTE Skill Sets at both levels. The secondary CTE licensed teachers and college instructors work collaboratively within individual Professional Development Plans to strengthen the CTE POS. Additionally, POS engagement occurs on an annual basis to keep the POS current.

A postsecondary CTE POS is a credit-based program that has secondary partners and provides a seamless transition to learners pursuing an approved program as identified in the [Oregon Community College Policy and Process Book](#). The approved postsecondary CTE POS is a Classification of Instructional Program (CIP) code in one of the 16 career clusters designated as “Perkins eligible.”

To be eligible, the program must, among other requirements, terminate in a certificate, diploma, or an Associate of Applied Science (AAS) or Associate of Science (AS) degree. If a postsecondary program does not have a joint application with a secondary CTE partner, the program(s) is not Perkins eligible. Additionally, the postsecondary CTE POS should be participating within collegial professional development with the secondary partner on an annual basis.

Postsecondary Customized Training Courses and Programs

Perkins resources may not be used by colleges for program expenditures related to learners pursuing non-credit courses and programs within customized training or employer sponsored training programs. For example, Perkins funds may not be used for costs related to providing customized training for ABC Corporation.

14.15 Funds for Support Services (Careers Nontraditional by Gender)

If a college or school district determines a need to fund support services for learners enrolled in a CTE program that is nontraditional for their gender, the college or school district must develop local guidelines within state and federal laws to provide assistance with dependent care, transportation services, special services, supplies, books, and materials for nontraditional learners in CTE-approved programs and/or services.

The Office of Career Technical and Adult Education (OCTAE) and the U.S. Department of Education have provided the following guidelines:

- Perkins funds cannot be provided to individual learners for the purchase of tools, uniforms, equipment, or materials.
- Perkins funds cannot be used for learner stipends or tuition.
- Childcare may be provided, but not by direct payments to CTE learners. Colleges and districts shall establish procedures for payments to vendors for childcare.

- Transportation costs for postsecondary learners may be provided, but not by direct payments to CTE learners. Colleges shall establish procedures for payments to vendors for transportation costs (bus or metro pass). Costs for public transportation or rates consistent with the cost of public transportation may be allowed only to provide transportation for postsecondary learners to attend a CTE approved education activity. (In areas where public transportation is not appropriate/available, colleges shall develop equitable options for learners by providing vouchers or purchase orders.)
- Perkins funds may not be used for car parts and/or maintenance.

At the secondary level—with the state learner transportation funds and Oregon’s learner transportation reimbursement—the use of Perkins funds for CTE educational activities and events, including learner transportation, would be considered supplanting; this is not allowed under Perkins.

Single gender, single demographic, or protected class status explicit activities must be carefully assessed to ensure they do not violate Civil Rights and protected status for other learners within the school system. A simple “girls only welding” is prohibited and is a violation of the Title IV law. Reach out to ODE and CCWD for further clarification as it relates to single gender or single demographic initiatives.

14.16 Perkins Funds in the Middle Grades

Prior to Perkins V, restrictions were in place for middle grade participation in Perkins funded programs and activities. Perkins V has lifted these restrictions to allow funds to be spent on career exploration activities at the middle grades. “Middle grades” includes grades 5-8. This flexibility allows recipients to offer innovative programs that provide learners with earlier opportunities to explore career options. All investments at the middle grades must be connected to activities that prepare learners for the secondary approved CTE POS.

Career Exploration and Development

Section 135(b)(1) provides the required use of funds for career exploration and career development activities. These activities may include learners in the middle grades. This section calls out an organized, systematic framework to aid in making informed plans and decisions about education and career opportunities and programs.

This systematic framework may include the following:

- Introductory course or activities focused on career exploration and awareness
- Career and labor market information—supply and demand, educational requirements, economic priorities, and employment sectors
- Programs and activities related to the development of education and career plans
- Career guidance and counseling activities that assist learners in making informed decisions
- Providing learners with strong experience and comprehensive understanding of all aspects of an industry. Events and activities need to be intentional and focused. The

maker space—building a birdhouse, baking cookies, or making paper airplanes—would not qualify.

Reach out to the CTE content education specialist at ODE for further details within career areas.

Programs of Study

Section 315 states that no Perkins funds may be used to provide CTE Programs of Study or POS prior to the middle grades. Equipment and facilities purchased with Perkins funds may not be used by these learners.

14.17 Braided Funding

Braided funding is the act of commingling funds from several sources in a coordinated manner to support a single goal, initiative, or activity. CFR §76.580 allows and encourages “federal (Perkins) grant recipients to coordinate each project with similar ones in the same locale.” Within the Perkins Grant, the deliverables are clearly identified within the budget narrative and maintain the single cost objective for each funding source that is contributing to the braiding of funds. If the braiding of funds is being used on inventory items, the percentage of Perkins investment needs to be identified within the inventory documentation and the disposition process needs to adhere to the Perkins and local requirements.

14.18 Perkins One-Stop Collaboration - 1.5% Set-aside

In compliance with the Workforce Innovation and Opportunity Act of 2014 (WIOA) and provisions regarding mandatory partnerships between postsecondary Perkins programs and the One-Stop Employment Centers, there is an expected cost sharing agreement between the designated postsecondary Perkins recipient and local workforce board. (Section 135(d))

The WIOA One-Stop Contribution from Perkins could be at the level of 1.5% of the Perkins postsecondary grant award and would be part of the indirect portion of the Perkins Grant. The indirect portion of the Perkins Grant is limited to 5%, and the 1.5% if allocated to the WIOA One-Stop Centers would limit the remaining indirect allotment to 3.5% for other fiscal indirect costs. If the Perkins postsecondary institution is part of a consortium, only the Perkins postsecondary award total is part of the 1.5% WIOA One-Stop Center contribution. With the WIOA One-Stop Center funding, there needs to be a signed agreement that documents the shared resources and proportionality of CTE learners that are being served within the postsecondary system. Seek CCWD guidance as it relates to the WIOA 1.5% set-aside.

14.19 Individual Elements of Cost

The following subsection deals with select individual elements of cost. These are areas where there are common questions, or more nuanced implementation. Refer to the Uniform Grant Guidance [2 CFR §200.420](#) for more items.

14.19.1 Equipment

The Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards defines certain requirements for pre-approval of equipment purchases and equipment

tracking. Federal guidance defines equipment as a single unit with a useful life of greater than one year and an acquisition cost of greater than or equal to \$5,000.

Acquisition cost of equipment means the net invoice price of the equipment, including the cost of modifications, attachments, accessories, or auxiliary apparatus necessary to make the property usable for the purpose for which it was acquired. Other charges, such as the cost of installation, transportation, taxes, duty, or protective in-transit insurance, shall be included or excluded from the unit acquisition cost in accordance with the recipient's regular accounting practices. (2 CFR §200.313 and 200.439)

Purchase orders for equipment should not be issued until the equipment is included as an equipment spending category expense within an APPROVED local application relevant to the year of the purchase and receipt of the equipment. No revisions can be made to equipment expenses in either the annual budget narrative or the voucher once an equipment expense has been submitted for reimbursement.

The CTE regional coordinator or Perkins grant manager should review and approve all purchase orders being charged to Perkins. This is especially important when an item in the local application was categorized as equipment, regardless of what the estimated Perkins portion of the expense was and when the requisition reflects costs are equal to or greater than \$5,000. If either situation occurs, the requisition should not be approved and forwarded until AFTER the local application is APPROVED with the relevant expense listed as equipment. This will also help the local recipient identify, track, and dispose of equipment that was purchased in whole or in part with federal funds.

Equipment purchased with federal funds, including Perkins funds, must have the following (200.313 (d)):

- Property records including acquisition date, cost, source, percent of federal funds used to purchase the item, location, use, and condition of the equipment and ultimate disposition
- A physical inventory of the property, which must be taken and the results reconciled with the property records at least once every two years
- Adequate safeguards to prevent loss, damage, or theft
- Adequate maintenance procedures

Equipment Inventory - 200.313(d)

Within the annual fiscal reporting, an inventory submission of purchases with Perkins resources during the current year is required. All equipment and non-consumable supplies of more than \$200 of value or which have a useful life of more than one year are presented as part of the inventory.

The Perkins Reserve Grant should not acquire equipment and/or non-consumable supplies that would be inventoried.

Additionally, Perkins recipients are required to conduct a complete inventory review and update every two years. Local educational agencies are expected to follow local policies and process for disposition, and/or reporting lost or delinquent inventory items and documenting inventory changes respective of the inventory change dates. All inventory documentation will be presented during a fiscal audit and/or Perkins program monitoring ([Section 15.2](#)).

The following elements are required within the inventory documentation:

- Property records, including equipment description (serial numbers, model numbers, physical description, etc., as applicable), acquisition date, cost, source, percent of federal funds used to purchase the item, location, use, and condition of the equipment and ultimate disposition
- A physical inventory of the property, which must be taken and the results reconciled with the property records at least once every two years
- Original expenditure/percent of grant funding

When possible, a physical tag should be permanently fastened to, or stamped on, each item of equipment/curriculum indicating Perkins funded expenditure. This tag must be identifiable to the inventory record. A copy of the current inventory needs to be maintained by the CTE regional coordinator or Perkins grant manager and kept within the business office of the local fiscal agent.

Incidental Use

Equipment purchased with Perkins funds may be used as described in the Perkins Local Plan/Update but may also be used in other programs under certain conditions. The equipment may be used if the use is incidental and does not interfere with the original purpose of the acquisition and does not add to the cost of using the equipment. Incidental use activities should not generate revenue for individual businesses or organizations and/or be used by the school district or college to generate revenue by leasing the equipment. Examples of multiple uses of equipment purchased with federal funds include, but are not limited to, the following:

- Computer labs at a summer computer camp or an after-school program
- CNC lathe in an adult training program
- Career exploration events
- School or college open houses

Disposal of Equipment

The disposition of equipment and non-consumable supplies must follow parameters of the local educational agency that is acting as the fiscal agent of the Perkins Grant. The following considerations should be utilized when the disposition of equipment and non-consumable supplies occurs:

1. The Perkins fiscal agent has the obligation to dispose of equipment and non-consumable supplies purchased within the Perkins Grant management (consortium or direct recipient).
2. All disposition of equipment must be identified within the current year's Perkins closing inventory, and inventory documentation should be retained for Perkins financial records

purposes. The inventory records would be presented at a Perkins monitoring and/or audit review.

3. Equipment disposal records including inventory documentation, disposal, salvage recovery funds, and any transfer information need to be retained by the consortium for three years and/or follow the local Perkins fiscal agency protocols if longer than three years of financial document retention.
4. Prior to disposition of equipment and non-consumable supplies, other Perkins approved POS should be considered as an acceptable recipient for transfer or title relocation. The transfer or title relocation would mutually benefit both Perkins programs.
5. Acquisition inventory process and disposition of curriculum software/licenses follow the same guidelines as stated above for equipment and non-consumable supplies.

14.19.2 Professional Development

In Oregon, each eligible local educational agency that submits a Perkins CTE Strategic Plan (four-year plan) must use 15% of the allocation grant for professional development consistent with the requirements of the law. The professional development funding totals approved by ODE October 1 within the budget narrative form the threshold of investment within professional development; it is not allowed to be re-invested to other function and object codes in the budget and expenditure process. The total budget dollar value for professional development as identified on October 1 has to be utilized for and on behalf of professional development during the student performance period July 1–June 30 annually. Professional development funds should not be budgeted to be used outside of the student performance period during the grant application phase.

14.19.3 Personnel

The school district or college has the obligation to fund teachers, instructors, faculty, and administrators' instructional support staff with state or local funds.

30% Cap

There is a 30% cap limit on personnel costs and leadership staffing within the Perkins Grant. Leadership is not to be viewed as administrative activities. The 30% staffing rule should be leadership focused or have a specific deliverable that is intended to meet a need identified within the local needs assessment. Examples of an expense under this cap may include the following:

- Staffing for a pilot program to determine if the potential solution would work within an educational service area. The staffing cost should be short-term in nature (e.g., one to three years) and have a sunset date.
- Personnel assigned to projects designed to improve CTE as specified in the Local application.

Please note: Building ongoing staffing infrastructure through the 30% personnel costs and leadership staffing would be considered supplanting. In all staffing cases, several documents will be required to be uploaded or submitted along with the local application.

Personnel Activity Reports

Personnel who are compensated in whole or in part with federal grant dollars are required to report on their duties/activities funded under the grant. This time and effort reporting—or Personnel Activity Reporting—reflects how teachers, faculty, and/or staff spent the time for which they were compensated through federal grant funds. For the sake of the Perkins Grant, we refer to these as Personnel Activity Reports (PARS).

The purpose of federally mandated time and effort reporting is to provide documentation to substantiate payroll charges. For example, if 25% of an individual’s time was charged to a federal grant, time and effort reports must substantiate that the individual spent at least 25% of their time working on activities to support that federal grant. Time and effort reports must be a single, certified document that reflects 100% of an employee’s time worked in each period.

OMB Uniform Guidance Subpart E §200.430 contains the federal regulatory requirements for time and effort reporting.

14.19.4 Field Trips

Field trips and/or other related CTE learner activities may be allowable under the Perkins Grant funding. This can include middle school career awareness activities that support CTE program enrollment at the secondary level. This funding may not be used for support of individual classes at the middle school level. If the field trips/activities are listed, budgeted, and approved as part of the annual Perkins consortium grant application, additional pre-approval is not required. The learner transportation should be covered by the state transportation fund and not Perkins funds. Additionally, food and meal costs should not be covered with Perkins resources.

14.19.5 Career and Technical Student Organization (CTSO) Activities

Investment of Perkins resources within CTSOs is limited to three key areas:

1. The CTSO is a “new program” — Zero to three years.
2. A new teacher to the school, career area, and/or CTSO —There is an allowance for a limited two-year investment.
3. Reestablishment of a CTSO that has been dormant for four years —The reestablishment investment is limited to a two-year investment.

CTSO investments need to rely upon the local needs assessment and stakeholder input to determine prioritization of funding. Additionally, other rules associated with supplanting and direct benefit apply to the CTSO investments. Perkins resources may be utilized to provide professional development exposure for administrators or counselors at CTSO events. The focus of attending a state or national CTSO event by an administrator or counselor should focus on professional development and not learner supervision or recreation associated with the event.

Additional guidance:

- Individual learner lodging and meals do not qualify as a permissible Perkins expenditure.
- Advisor travel, lodging, and meals must include staff development activities for licensed CTE staff (Perkins funds are not allowable for chaperones).

- All Perkins funding recipients must be licensed CTE teachers/administrators or counselors.
- Perkins funding can be used for the purchase of branded organizational materials if those materials remain the property of the program and are not distributed to individual learners upon program completion.
- All members of the learner organization or class/program must have an opportunity to participate in the funded activity (this opportunity may reflect qualifying competitive performance or participation).

14.19.6 Perkins Funding for Curriculum Software/License

- Acquisition and disposal of curriculum software/licenses follow the same guidelines as stated above for equipment.
- Perkins funding is not a sustainable long-term funding source for secondary and postsecondary initiatives. (Consequently, license and curriculum program funding are restricted to two-three years of support.)
- Inventory control must be maintained the same way as recommended for equipment.

14.20 Required Local Policies

According to the Uniform Grant Guidance, all recipients of federal grant funds must have the following written policies in place. These policies will be used by auditors and in the event of a Perkins monitoring visit.

The required written policies will be provided annually on June 30 at the time of the Perkins Grant submission.

Written Cash Management Procedures §200.302(b)(6); 200.305

These are written procedures regarding cash management and claiming of Perkins funds that include “advance payment” and “cost reimbursement.”

Advance payment policy must cover the following:

- Rationale why the “cost reimbursement” was not an option
- Advance funds limited to the minimum amounts needed
- Be timed to be in accordance with the actual deliverable
- Immediate cash requirements of the local educational agency in carrying out the purpose of the approved Perkins deliverable
- As close as administratively feasible to the actual disbursements

Cost Reimbursement must be expenditures obligated, delivered, completed, and liquidated before reimbursement.

Written Conflicts of Interest Policy - §200.318(c)

Each local Perkins fiscal agent must have a written conflicts of interest policy and procedures. The written procedures should answer such questions as: What is considered a conflict of interest? How is it determined that an employee has a conflict of interest? How is it

determined that the procedures are being followed, when the steps are performed, and what is being verified?

Written Procurement Procedure - §200.319(d) and 200.320

Each local Perkins fiscal agent must have a written procurement policy and procedure process that ensures all solicitations will

- incorporate clear and accurate description of the technical requirements for the material, product, or service to be procured or provided.
- identify all requirements which the offers must fulfill and all other factors to be used in evaluating bids or proposals.
- have consistent small purchase procedures.
- manage procurement by sealed bids (threshold, format, process).

Written Travel Policy - §200.475

Each local Perkins fiscal agent must have a written travel policy and procedure process that ensures all travel is consistent with Perkins deliverables and conforms with the local fiscal agent's internal protocols. Additionally, all travel to vacation or entertainment-based destinations requires ODE approval. International travel—including Hawaii and Alaska—with Perkins is not allowed.

Written Procedures for Managing Equipment - §200.313(d)

Each local Perkins fiscal agent must have a written policy and procedure for the management of equipment. Additionally, the policy must be consistent with Oregon's Perkins equipment, inventory, and disposition policies.

Written Time and Effort Policies and Procedures - §200.430

Each local Perkins fiscal agent must have a written policy and procedure for Perkins staffing, time and effort reporting, and documented position descriptions for each staff member funded by the Perkins Grant (whole or part). Additionally, the policy must be consistent with Oregon's Perkins staffing thresholds and expectations.

NOTE: If staffing positions are funded with the Perkins Basic or Reserve Grants, the position descriptions for all staff members being supported through Perkins need to be uploaded at the time of the grant application prior to June 30 annually.

Written Teacher Stipend/Curriculum Rate Policy - Employee Benefits – §200.431

Each local Perkins fiscal agent must have a written policy and procedure for Perkins funds being utilized for teacher stipend/curriculum rate compensation.

The use of a teacher stipend to compensate educators for non-contract hours may be utilized as they are participating within professional development, developing curriculum, or engaging in business and industry partnerships and/or other activities that are not administrative in nature (paperwork). If a teacher stipend is going to be utilized, the compensation rate needs to

be consistent with the governing fiscal agent’s policy on non-contract compensation or “curriculum rate,” and be applied evenly across the institution(s).

14.21 Budget Narrative Function Codes and Object Codes

Annual Budget Narrative and Spending Plan Components

Below is a listing of the function and object codes that may be used when developing a Perkins budget, along with a description or examples of each code.

Function Code	Description
Curriculum – Standards, Content, Alignment and Articulation Function Code 2210	Industry-based content standards and supportive academic standards that support CTE POS and career pathways for learners transitioning between secondary, postsecondary, and career options.
Curriculum – Student Support Services, Work-Based Learning and Career Exploration Activities Function Code 1131	Provide learners with relevant career-related learning experiences, access to educational opportunities for careers that are nontraditional for a learner’s gender, and access to CTE learning environments for high-skill, high-wage, in-demand careers that lead to self-sufficiency. Support of Work-Based Learning opportunities and experiences of learner, including Career Exploration Activities.
CTE Professional/Personnel Development Function Code 2240	CTE Professional/Personnel Development
Scientifically Based Research Function Code 262X	Scientifically Based Research Study and Analysis – Publishable peer review products
Indirect - Support Services - Central Activities Function Code 2600	INDIRECT – Support Services – Central Activities – Administrative – 5% limit

Use the following Object Codes:

Object Code	Description
111 Licensed Salaries	111 Licensed Salaries includes licensed coordinators and employees in the bargaining unit
112 Classified Salaries	112 Classified Salaries for work performed by "Classified Employees"
11X Support Staff Salaries	11X Salaries associated with "Support Staff and Support Personnel"
11X Program Coordinator Salaries	11X Salaries associated with "Program coordinators/regional coordinators"

Object Code	Description
2XX Licensed Benefits	2XX Benefits associated with "Licensed Employees" not included in the gross salary
2XX Classified/Support Staff Benefits	2XX Benefits associated with "Classified Employees" and "Support Staff" not included in the gross salary
2XX Program Coordinator Benefits	2XX Benefits associated with "Program coordinators/regional coordinators" not included in the gross salary
12X Substitute Salaries	12X Substitute Salaries for employees who are hired on a temporary or substitute basis
31X Local Instructional Services	3XX Local CTE Instructional Services (Purchased)
31X Regional Instructional Services	3XX Regional CTE Instructional Services (Purchased)
34X Travel	34X Travel costs (e.g., mileage, hotel, registration, per diem, meals, car rentals, etc.)
410 Consumable Supplies and Materials	410 Consumable Supplies and Materials. This area includes expenditures for ALL supplies for the operation of a CTE program. NOTE: Follow Perkins expenditure guideline for appropriate use of funds.
460 Non-consumable Equipment Items	460 Non-consumable Equipment Items. Expenditures for equipment with a current value of less than \$5,000 or for items which are "equipment-like." This object category could be used when a district desired to treat these items as equipment for budgeting, physical control, etc., without either violating the capital equipment issues of Perkins.
470 Computer Software	470 CTE Computer Software. Expenditures for published computer software. Include licensure and usage fees for software here. The Cloud is considered software and would be coded here.
480 Computer Hardware	480 CTE computer hardware. Expenditures for non-capital computer hardware, generally of value not meeting the capital expenditure criterion. An iPad or e-reader needed to access e-textbooks is considered hardware and would be coded here.
541 Initial/Additional Equipment–Depreciable ***Requires ODE Approval***	541 CTE depreciable equipment (Single pieces of equipment or technology items over \$5,000) to enhance and improve CTE POS
690 Grant Indirect Charges	690 Grant Indirect Charges
640 Dues & Fees	640 – Dues and Fees
8XX Miscellaneous	8XX – Miscellaneous – (not a catch-all category)

Below are the six areas for which there will need to be a narrative response along with a budgetary amount designated for each investment. The Perkins Budget Narrative template has the function codes and object codes to be selected for each investment. All expenditures need to have the respective school, campus, and CTE POS that is utilizing/acquiring the items and/or activity. Additionally, describe the expense (manufacturer, model number, activity, cost, total number of items, calculations to reach item total).

Curriculum – Standards, Content, Alignment, and Articulation

Function Code 2210

Regional or district strategy for CTE program development and implementation: do not include primary regional or district staffing/personnel costs in this section, as they will be presented in a subsequent section.

Items may be grouped into object code specific categories, yet should maintain the detail as to what program and school items are being allocated.

Curriculum – Student Support Services, Work-Based Learning, and Career Exploration Activities

Function Code 1131

Regional or district strategy for CTE program development and implementation: do not include primary regional or district staffing/personnel costs in this section, as they will be presented in a subsequent section.

Items may be grouped into object code specific categories, yet should maintain the detail as to what program and school items are being allocated.

Professional Development

Function Code 2240

Regional or district strategy for CTE program development and implementation: do not include primary regional or district staffing/personnel costs in this section, as they will be presented in a subsequent section.

Items may be grouped into object code specific categories, yet should maintain the detail as to what program and school items are being allocated.

Scientifically Based Research

Function Code 262X

Regional or district strategy for CTE scientifically based research study and analysis—publishable peer review products: be specific to scientifically based research 262X. Do not include primary regional or district staffing/personnel costs in this section, as they will be presented in a subsequent section.

Staffing

Limited to 30% of entire grant allocation. Explicitly describe for all employees funded by Perkins V:

- Identify the function code for staffing based on the activities performed:
 - Curriculum – Standards, Content & Alignment 2210
 - Curriculum – Student Support Services & Work-Based Learning 1131
 - Professional Development 2240
 - Scientifically Based Research 262X
- Object code
 - 111 Licensed Salaries
 - 112 Classified Salaries
 - 11X Support Staff Salaries
 - 11X Program Coordinator Salaries
 - 2XX Licensed Benefits
 - 2XX Classified/Support Staff Benefits
 - 2XX Program Coordinator Benefits
- Staff assignment/duties – include copy of job description
- FTE by percent use
- Hourly rate
- Calculation to reach item total

NOTE: Time and effort records are required to be submitted annually with the Perkins Fiscal Report.

Grant Indirect Charges

Section 135(d) of the Perkins V Act states that each eligible recipient receiving funds shall not use more than 5% of those funds for costs associated with administration. Administration costs are made up of direct and indirect costs. Indicate the total indirect grant charges—that amount cannot exceed 5% of the total grant allocation.

14.21.1 Budget Narrative Changes and Revisions (CFR §200.308)

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. To request a change, please follow these steps:

1. Send an email to ODE staff – [Reynold Gardner](#). In the email, describe:
 - a. The POS/schools 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 POS 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.
3. The revised plan is not authorized for spending until approved changes are included within the Perkins Budget Narrative.

14.22 Records Retention (CFR §200.334)

Perkins financial records, budget narrative, expenditure reports, annual report, personal activity reports, inventory, and other documents used within the local Perkins management are required to be maintained for three years unless the local educational agency records retention policy extends beyond the three-year period. The Perkins financial records documentation must be available upon request during a fiscal audit and/or Perkins program monitoring event.

14.23 Technical Assistance

ODE offers ongoing technical assistance and a variety of workshops, webinars, and other training opportunities each year to help local personnel better understand proper use and management of Perkins funds. Additionally, new CTE regional coordinators or program managers for direct grant recipients are required to participate in a two-year training cadre ([Perkins Boot Camp](#)).

ODE staff is also available, upon request, to provide individualized technical assistance, including on-site visits as necessary and as capacity permits.

15 – Monitoring

15.1 Oregon’s Approach to Monitoring

ODE, the Office of Teaching, Learning and Assessment/Secondary-Postsecondary Transitions team (SPST), and the Higher Education Coordinating Commission, Office of Community Colleges and Workforce Development (HECC/CCWD)—as staff to the Oregon State Board of Education—will annually monitor the Carl D. Perkins Act of 2018 (The Strengthening Career and Technical Education for the 21st Century Act [Perkins V]) eligible recipients and their subrecipients for the purposes of

- assuring that Carl D. Perkins funds have been expended appropriately to meet the intent of the legislation and in compliance with federal and state laws, regulations, and policies;
- reviewing and verifying accurate data collection;
- ensuring that reporting policies are established and implemented;
- analyzing, identifying, and changing policies and activities that hinder quality program development and learner achievement; and
- ensuring that equal educational opportunities are provided to all learners, including full opportunity to participate in programs, activities, and career opportunities, and to benefit from services.

The Uniform Grant Guidance 2 CFR §200.332, 200.206, and 200.520 delineates requirements for monitoring, clearly stating that as the eligible subrecipient for Perkins funds, ODE is responsible for monitoring the “day to day” operations of supported activities to assure compliance with applicable federal requirements. Accordingly, ODE is responsible for developing a monitoring process with an adequate scope, frequency, and timeliness to ensure compliance. Annually, four to six Perkins Grant subrecipients will be selected for Monitoring Review.

A webinar provided by the U.S. Department of Education, Office of Career, Technical, and Adult Education, Division of Academic and Technical Education, entitled [Using a Risk-Based Approach for Effective Subrecipient Monitoring](#), recommends using a risk-based approach to monitoring. There are four steps in risk-based monitoring, as follows:

1. Identify Risk Indicators

Typical risk indicators for Perkins programs include the following:

- History of poor achievement of Perkins performance targets
- Difficulty with timely and accurate submission of data and fiscal information
- Change in scope of grant project
- New program or fiscal staff
- Change in the size of the grant

2. Conduct Risk Assessment

- Conduct unbiased review of risk indicators. Rank subrecipients based on the selected criteria.
- In some cases, it is important to determine high, medium, and low risk participants.

3. Perform Resource Assessment

- Identify the need for monitoring and the agency and local resources available.

4. Develop Monitoring Plan

- Develop a monitoring plan based on need and resources available that will ensure the obligation to assure federal requirements are being met.

Based on needs and resources available, monitoring may look quite different between subrecipients, depending on varying levels of intervention and intensity. Examples of monitoring practices include the following:

- Annual plan review of every Perkins Plan with follow-up to those needing technical assistance
- Technical assistance phone calls prior to data collection to subrecipients with prior difficulties to ensure understanding and capacity to provide accurate and timely data
- Workshops targeting specific areas that many subrecipients struggle to meet
- Desk review/monitoring of financial documents
- On-site visit to meet and discuss areas of concern

This guidebook will focus primarily on the obligation of the state to ensure funds have been expended appropriately to meet the intent of the legislation and in compliance with laws, regulations, and policy.

15.2 Carl D. Perkins Monitoring

Identification of Risk Factors

The risk factors that may hinder full fiscal compliance with Perkins requirements have been identified as the following:

- Perkins leadership and staff
 - Is there a full-time person responsible for program implementation?
 - Does the program manager have multiple job assignments?
 - Has the program manager been in the position less than two years?
- Program performance
 - Are local programs meeting Perkins performance indicators?
- Late, substandard, or inaccurate submissions
 - Are reports submitted on time with a high level of accuracy?
 - Are there requests for extensions on deadlines?
 - Is data submitted with unresolved errors?
 - Do applications and other submissions require major or minor revisions?
- Local budget management
 - Are funds spent as approved?
 - Is prior approval obtained before budgetary changes?
 - Are the standards met regarding leadership staffing, professional development, and administrative caps? Does inventory match the approved budget?

- Are there findings within the annual local audit?
- Are funds drawn down in a timely fashion to ensure allocability requirements are met?

Conducting the Risk Assessment

A risk assessment rubric was developed to help identify subrecipients who could benefit from technical assistance and support within Perkins compliance. Each year, the indicators and associated levels of risk are reviewed and revised, as necessary. The risk assessment is conducted by multiple education specialists from ODE and CCWD during the early fall of each year using information gained from the activities described below.

Annual Report Review

The annual report is submitted during the fall of each year for the preceding year. The report is reviewed for both fiscal and program information not associated with fiscal elements. The fiscal staff review that the expenditure categories match the approved budget, administrative costs are capped, and professional development expenditures are met. Additionally, this report contains inventory records that are compared to the approved budget.

Data Submission

Data submission and validation takes place from mid-May until the end of June. Validation occurs in fall and winter. The data analyst tracks submissions for potential errors and works with submitting institutions to resolve data issues and improve data quality year-over-year.

Fiscal Analysis

The grant drawdown patterns are analyzed to ensure funds are expended early in the grant award period. The federal audit clearinghouse is accessed to check single audit (A-133) findings. Agency records are reviewed to check local audit concerns.

Application and Annual Report Quality

As various applications and reports are submitted, staff keep track of the timeliness and quality of submissions.

Using the information collected through these activities, the risk assessment rubric is used to assign a numeric risk. Themes across indicators are analyzed to identify widespread need for monitoring and technical assistance. The subrecipients are ranked according to level of risk to identify those needing targeted monitoring. Annually, four to six grant subrecipients will be selected for further analysis and monitoring.

15.3 Monitoring Elements

Staff at ODE and CCWD take a multipronged approach to fiscal monitoring of Perkins subrecipients. Leveraging a long history of technical assistance and support over heavy-handed compliance practices, staff strive to quickly identify and anticipate potential issues and deal with them in a proactive fashion.

Annual Budget Approval and Revision Process

At the beginning of the Perkins Grant application cycle (2023-2025), subrecipients submit a detailed budget narrative in conjunction with their Perkins application. The budget narratives are reviewed based upon 1) the rules of supplanting and 2) permissible use of funds; a follow-up technical assistance webinar may be scheduled with each applicant.

During the technical assistance webinar, agency staff begin with a broad discussion on statewide items/trends identified within the budget reviews. Then specific items identified within the individual grant reviews are addressed. These technical assistance conversations are to clarify the goals and deliverables related to the budget narrative requests. Specific problem solving takes place to ensure budgets were for allowable and allocable expenditures.

General Technical Assistance Activities

When reviewing the risk assessment rubric, themes are often identified that may indicate a general need for clarification and technical assistance. Technical assistance activities are designed based on these results, and typically include the following:

- Direct telephone conference calls/visits when appropriate to discuss more detailed or in-depth needs that cannot be handled in a group setting
- Technical assistance webinars to discuss aspects of fiscal grant management

Targeted Monitoring Activity

Each year, four to six subrecipients will be identified for Perkins monitoring. Education specialists utilize the risk assessment to provide recommendations of the subrecipients that could be monitored. The recommendations are then presented to the leadership team for approval. The following high-level timeline guides the targeted monitoring activity:

- October/November
 - Conduct risk assessment rubric
 - Identify monitoring participants
- December
 - Notify participants in writing and request supporting documentation
- January
 - Submit documents for review
 - Chart of accounts
 - Detailed expenditure report
 - Inventory
 - Personnel activity reports
 - Perkins staffing position descriptions
- February
 - Education specialist provides desk review of fiscal results
- March
 - Conduct follow-up conversation by telephone/zoom or in person

- May
 - Provide written report identifying findings, corrective action, and exemplary practices—complete with follow-up plans
OR
 - Provide written report of compliance

Data Accuracy and Reporting Elements

The Perkins Accountability framework includes assuring accurate data and reporting strategies are in place. Different data collection and reporting systems are used to capture various elements of secondary and postsecondary Perkins data.

At the secondary level, there are three separate collections. These collections capture information about CTE programming offered and multiple elements of learner engagement with CTE. At the postsecondary level, institutions submit similar information through their own collection systems.

Data quality is supported by one-on-one guidance for submitting institutions and ODE-hosted technical assistance webinars, workshops, and guidebooks provided for all data submission events and data report validation events.

As part of the Perkins Monitoring framework, data components are included within the risk assessment rubric and in the event a subrecipient is selected for monitoring. A specific evaluation of the data and data quality will be conducted for the subrecipients. Further technical assistance, if needed, will be provided according to the individual needs of the subrecipient.

For more information about Perkins data and reporting, please visit the [ODE CTE Data website](#).

15.4 Monitoring Resources

[Sample Letter of Notification](#)

[Sample Perkins Fiscal Monitoring Checklist](#)

[Sample Compliance Letter](#)

15.5 Technical Assistance and Support Resources

The agency has identified the following resources available for assistance in Perkins monitoring and technical assistance:

- Individual technical assistance through phone calls, digital conferencing, email, or in person, tailored toward individual area of need or non-compliance
- New Perkins Grant manager/regional coordinator onboarding workshops, “Boot Camp,” Perkins Office Hours, and CTE Lunch & Learn Q&A sessions
- Webinars, workshops, and written guidance to target areas of common need
- Conference/workshop presentation availability for locally organized professional development events
- In-time technical assistance webinars

- Desk audit with technical assistance call
- Desk audit with on-site monitoring visit
- Intensive and regular technical assistance and corrective action plan support

16 – Charter Schools and CTE

In Oregon, charter schools are public schools with all the roles and responsibilities associated with being a public school—with some flexibility in how they organize and deliver instruction. Charter schools in Oregon offer instruction in a variety of formats: in-person, online, or a hybrid approach blending online and in-person. Regardless of instructional mode, charter schools are specifically called out in Perkins law as an eligible recipient of funds.

Charter schools may be a direct grant recipient or may be part of a Perkins consortium, depending on the size of the allocations. As mentioned elsewhere, Section 131(c)(1) of the Perkins Act states that schools generating less than \$15,000 must join a consortium. Currently, all Oregon charter schools are part of a consortium.

As a public school in consortia for Perkins funding, charter schools are held to the same programmatic, oversight, and fiscal requirements as the other schools in a Perkins consortium. Please refer to [Section 11](#) regarding grant recipient roles and responsibilities, and in particular [Section 11.4](#), explaining the secondary approval processes.

17 – Online/Virtual Schools and CTE

Because the enrollment of online/virtual schools includes learners who may reside outside of the region, online/virtual charter schools do not necessarily fall within the traditional Perkins funding model and therefore do not currently receive Perkins funds directly. However, the learners who reside within the region are included in the region’s population counts and therefore generate funds that are added to each region’s allocation. CTE regional coordinators are asked to support online/virtual schools as much as they are able.

Online/virtual CTE POS are held to the same high-quality standards as other CTE programs with some flexibility in how they organize and deliver instruction and provide technical skills and work-based learning opportunities for learners.

Tips and resources for working with online/virtual schools:

- Familiarize yourself with ODE’s resources for online and remote learning work:
 - [ODE’s Online and Remote Learning Work web page](#)
 - [ODE’s Online and Remote Learning Guidance](#)
 - [Remote and Online Learning Policy FAQ](#)
- New programs can be modeled after already existing online/virtual programs in the state
- Encourage online/virtual CTE administrators and instructors to participate in consortia meetings, events, and professional development as well as statewide POS meetings and professional learning communities (PLCs)
- Encourage online/virtual CTE administrators and instructors to participate in the flexible learning PLC

18 – State Institutions and CTE

Two percent of the Perkins state leadership fund set-aside mentioned in [Section 10](#) is earmarked to serve individuals in state institutions. In Oregon, those institutions include adult correctional institutions via the Oregon Department of Corrections (DOC), juvenile justice facilities, and Oregon School for the Deaf.

Adult Corrections

The DOC is a direct grant recipient and is asked to follow the same fiscal guidance as other direct grant recipients (as is applicable).

Youth Corrections

The purpose of Perkins juvenile justice funds is to provide CTE experiences and training for learners in the juvenile justice system that can lead to community college enrollment and/or a career in CTE as they transition back into their communities.

Perkins funds are made available to juvenile justice facilities through a partnership with the following: ODE’s SPST team; the ODE Office of Enhancing Learner Opportunities (OESO); education specialists who oversee the Youth Corrections Education Programs (YCEP) and the Juvenile Detention Education Programs (JDEP); and the YCEP/JDEP network, which is made up of administrators, teachers, and managers from YCEP/JDEP facilities. The YCEP/JDEP network determines what CTE projects get funded each year through an application and selection process.

Youth in YCEP/JDEP facilities are counted in the census population of the region in which the facility is located and therefore generate funds that are added to each region’s allocation. Most of the YCEP schools are also part of a CTE regional consortia and can also receive additional support from their CTE regional coordinator.

Tips and resources for working with YCEP/JDEP schools:

- Encourage facilities to apply for the YCEP/JDEP network funds
- Encourage YCEP/JDEP administrators and instructors to participate in consortia meetings, events, and professional development as well as statewide POS meetings and PLCs
- Encourage YCEP/JDEP administrators and instructors to participate in the flexible learning PLC

Oregon School for the Deaf and CTE

The Oregon School for the Deaf (OSD) is a state school in Salem, Oregon; it is considered a state institution under Perkins federal definitions. It serves approximately 95 deaf and hard of hearing learners from kindergarten through high school, and up to 18 years of age.

19 – Private Nonprofit School Participation

A private institution does not meet the definition of an eligible recipient under Perkins definitions and therefore cannot receive a Perkins allocation. However, Section 317 of the Perkins Act discusses the participation of private school personnel and learners in Perkins activities.

(This section does not apply to charter schools—charter schools are public schools. Please refer to [Section 16](#) for information on working with charter schools.)

Personnel

A Perkins recipient (college, district, or consortia) that uses funds for in-service and preservice CTE professional development programs for CTE teachers/instructors, administrators, and other personnel *shall* permit private nonprofit school personnel to participate under the following conditions:

- It is practical to allow participation—for example, there is space available in the workshop or the cost to include the private school personnel is minimal.
- A request for participation from the private school is made in writing. The request should be from the administration of the private school to the Perkins program administrator.
- The private school is located in the geographical area served by the Perkins recipient.
- The professional development activity is conducted in a public setting such as the school district or venue typically used for professional development, not at the nonprofit private school.

Student Participation

Section 317 states that, except as prohibited by state or local law, a local recipient *may*, upon written request, use Perkins funds for the meaningful participation in secondary CTE programs and activities, as long as the private nonprofit school attended is within the geographical areas served by the local recipient. Some questions to ask may include:

- What does meaningful participation include?
- The local recipient *may* allow learners to participate. What is the impact of participation on the program, learners, and families from both the public and private schools, and the community?

Consultation

A private nonprofit school wishing to have learners and/or staff participate in Perkins related programs and activities shall make a written request to the superintendent of the public school where the organization is located.

Upon receipt of the written request, the superintendent or designee shall consult in a timely and meaningful manner with a representative of the private nonprofit school to determine the meaningful participation of private nonprofit secondary school learners and staff.

20 – Leveraging Learner Voice in CTE

Following are excerpts and tips taken from Advance CTE’s [“With Learners, Not For Learners: A Toolkit for Elevating Learner Voice in CTE,”](#) which Oregon helped to create.

“CTE programs must be designed with learners, not simply for learners, to be responsive to their diverse needs at every stage of the CTE continuum. Being responsive to diverse learner needs can occur only if learners have direct and ongoing input into the design and delivery of CTE programs and experiences.

*“Learner voice is often neglected even though learners themselves are affected directly by decisions made about CTE programs and have invaluable first-hand experiences. It is therefore critical that learners be engaged as key stakeholders in the decision-making process within CTE programs. By empowering learners to share feedback regarding their CTE experiences through intentional and ongoing feedback loops, CTE programs can better address learner needs, break down barriers—particularly for historically marginalized populations—and improve quality. Engaging learners in a meaningful way in CTE program design and delivery can also increase learners’ engagement in their education and sense of agency over their own lives, while developing their communication and collaboration skills.”
(Page 1)*

Tips and Resources for Leveraging Learner Voice in CTE:

- Review the full [Advance CTE Toolkit](#)
- Provide multiple avenues for ongoing learner engagement (surveys, focus groups, social media, or other methods)
- Ensure learner engagement opportunities are inclusive of all CTE learner voices
- Find ways to sustain learner engagement through regular institutionalized processes
 - Invite learners to become members of advisory committees
 - Include learners in decision-making where possible
 - Engage in comprehensive local needs assessment
- Ensure learners are recognized for their contributions
 - Provide incentives for participation/engagement
 - Provide compensation for their time and travel (if needed) for learners who engage on an ongoing basis
- Treat learners as valued and trusted partners
 - Encourage brave spaces where learners can talk honestly and openly without fear of retribution
 - Provide incentives/compensation where possible

Follow up learner engagements with what was learned and how the information will be used.

21 – Additional CTE Funding Sources

21.1 - Secondary Career Pathway Funding

During the 2015-2017 biennium, the Oregon Legislature appropriated \$8.75 million for Secondary Career Pathway funding (CP). Through [HB 3072](#), this first-ever funding was provided to encourage the continued growth of approved Career and Technical Education (CTE) POS that lead to high-wage and high-demand occupations and to award programs for attracting and retaining learners, especially “historically underserved” learners into these programs. Reviewing the legislation cited above and the associated Oregon Administrative Rules, the Secondary CP Grant funding is intended to incentivize school districts to develop programs that increase the number and diversity of learners who earn three or more credits in a high-quality CTE POS that is a pathway to high-wage and in-demand jobs.

According to Section 2(4) of HB 3072:

Moneys distributed as provided by subsection (2)(b) of this section to fund activities related to career and technical education that can lead to high wage and high demand jobs shall be used for:

(d) Distribution to school districts to support career and technical education programs in the school district that are approved by the Department of Education as being high quality and that can lead to high wage and high demand jobs. Moneys must be distributed to each school and public charter school in the school district based on the number of learners enrolled at the school with the following characteristics:

- (A) Students who are enrolled in and earned three or more credits for courses that are part of a career and technical education program that can lead to high wage and high demand jobs and that are approved by the Department of Education.
- (B) Students who acquire an industry credential that can lead to a high wage and high demand job and that is approved by the Department of Education.
- (C) Students described in subparagraph (A) or (B) of this paragraph who are historically underserved, as defined by the State Board of Education by rule.

Unpacking the Legislation

- Funds are determined by the Oregon Legislature for the biennium; those funds are divided and awarded annually.
- Funds can be distributed only to approved CTE POS.
- Funds will be distributed to school districts to support the CTE POS that generated the funds within their schools and charter schools.
- Allocations will be calculated based on:
 - Learners who are enrolled in the eligible CTE POS
 - Learners who earn three or more credits in the CTE POS
 - Learners who attain an industry recognized credential

- Learners who earn three credits or an industry recognized credential are identified as historically underserved.

The Secondary CP funding is granted by the Oregon Legislature to ODE for the biennium; the [Oregon Administrative Rule](#) governing this program states the grants will be awarded annually. Therefore, two grants are offered each biennium—one for each year of the biennium. Each of those grants will require an application.

As indicated in the following pages, accurate data submission by CTE site/district is critical in calculating the allocations due to each qualifying CTE POS. The CTE Student and Course Collection along with Spring Membership and the CTE Program Update are used in the calculations. The CTE site/district is responsible for completing any data corrections during the spring collection window. Data corrections cannot be made after the collection closes.

CP Points Calculation Methods

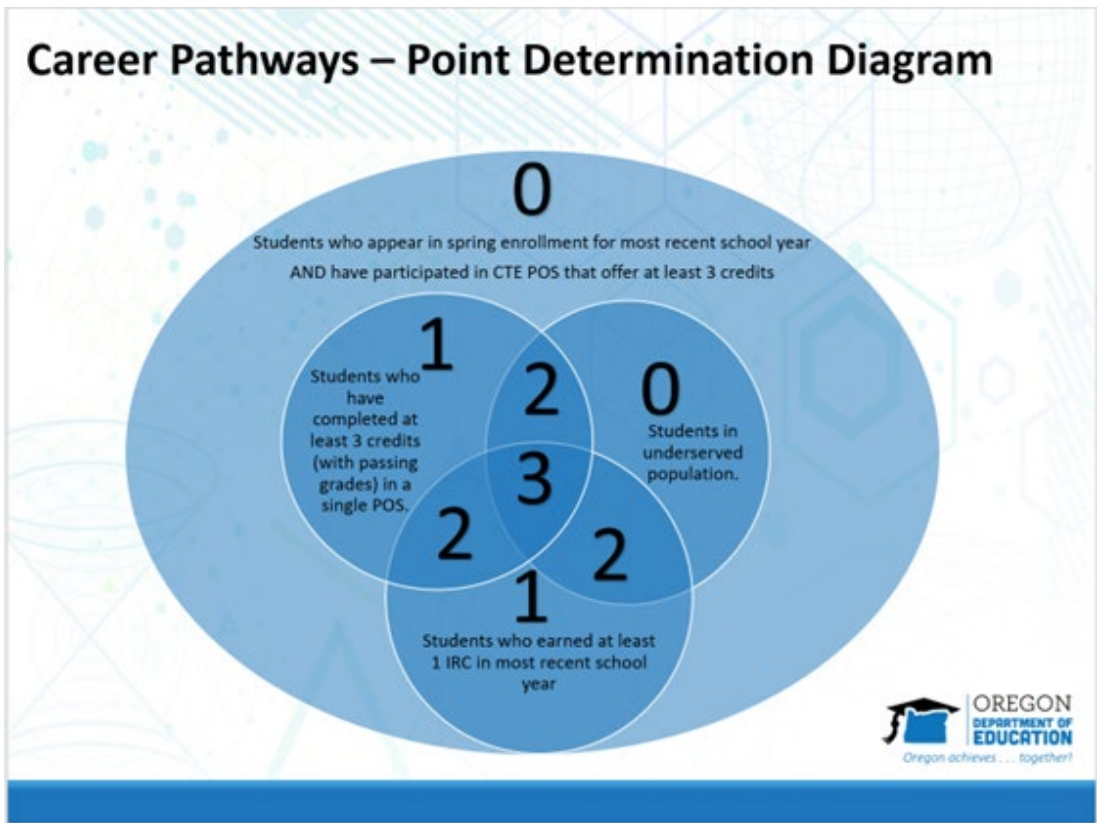
CTE sites offering state approved CTE POS with three or more unduplicated credits at the secondary level are eligible for accruing CP points. Programs that are start-ups (aka “in transition” status) receive a separate type of funding and are not eligible for Secondary CP disbursements until a disbursement year in which the POS is fully approved.

A CTE site is a secondary school or other secondary course-offering institution that has one or more Perkins CTE programs as start-up(s) and/or fully approved POS(s) in the ODE CTE Information System.

There are three categories of CP points. There is a limit of 1-point-per-category-per-learner-per-POS-per-year.

1. Learner credit-based point
2. CTE Industry Recognized Credential (IRC) point
3. Historically underrepresented point

The diagram below provides a visual of CP point assessment. Additional information on each point type is below.



Learner credit-based points

Institutions report learner course activity each year regardless of “Participant” or “Concentrator” status. This is done through the Spring CTE Student and Course Data Collection.

Each year, ODE tallies points by-learner-by-POS, looking over each learner’s entire high school career. If a learner obtains postsecondary credits outside of dual credit opportunities, these do not count toward the three-point threshold.

Once a learner reaches the three-credit threshold in a specific POS, that POS receives a learner-credit-based point.

In subsequent years while that learner continues in high school, their learner-credit based point will be applied to the POS even if that learner does not have more credits earned in that specific POS.

This is to encourage schools to support learners through CTE POS earlier in their high school years without incentivizing them to “hang on” to that learner with duplicated credits, etc., after that learner has gone through the POS.

Example: A sophomore in school year 2022-2023 who met the 3.0 threshold will have a learner-credit-based point applied to that POS for CP report year 2022-2023. Even if they move onto another CTE POS or cease CTE engagement at that point, the POS will get a learner-based point each year for that learner if they are in school—for their junior year in 2023-2024 and their senior year in 2024-2025.

For a school to receive this type of CP point on a learner, that learner must have both completed (with passing grades) three or more credits in a single state-approved CTE POS over their high school tenure-to-date and appear in the report year's spring membership (in any ODE-reporting school).

Each learner meeting the above criteria earns the CTE POS one learner credit-based point.

CTE Industry Recognized Credential points

Institutions report learner CTE Industry Recognized Credential activity each year regardless of "Participant" or "Concentrator" status. This is collected via the Spring CTE Course and Student Data Collections.

Each year, ODE applies CP points to the POS for CTE Industry Recognized Credential earned in the report year only.

A learner's CTE Industry Recognized Credential gives one, one-time CP point to the POS for which it was earned.

ODE checks to make sure the learner has not already been reported for the same CTE Industry Recognized Credential in previous years, as each learner is only granted credit a maximum of once per CTE Industry Recognized Credential. There are also exclusions on double-reporting CTE Industry Recognized Credential for multiple CTE POS. For example, the welding certifications must be coded as EITHER for an Agriculture OR as an Industrial Engineering POS and CANNOT be reported as earned for both CTE POS either in the same report year or in different report years. Please reach out to an education/content specialist for details on specific CTE Industry Recognized Credential requirements and restrictions.

Up to one CTE Industry Recognized Credential point is earned for the CTE POS for each learner awarded a CTE Industry Recognized Credential in the report year.

Learners who earn multiple CTE Industry Recognized Credentials in a single POS in a single school year still contribute a maximum of one CTE Industry Recognized Credential point.

Historically Underrepresented Points

This type of CP point is added to either a learner credit-based point or a CTE Industry Recognized Credential point earned by a learner in one of the CP-specified underrepresented groups. The specific groups are defined by the ORS cited above and include:

- Learners belonging to racial or ethnic minority
- Learners experiencing economic disadvantage
- Learners with limited English proficiency
- Learners experiencing disabilities

Learners meeting multiple requirements for an underrepresented point still contribute a maximum of one underrepresented point.

Examples

Example 1

An Indigenous learner flagged as economically disadvantaged has completed three credits in a single POS and earned a CTE Industry Recognized Credential in that same POS.

The POS of the above learner earns three CP points with the following breakdown:

- One learner credit-based point
- One CTE Industry Recognized Credential point
- One underrepresentation point. The POS is limited to a maximum of one underrepresentation point per learner even when a learner is a member of more than one of the specified focal student groups.

Example 2

A White Non-Hispanic learner with an IEP (Individual Education Program) has completed three credits in a single CTE POS and earned two CTE IRCs (Industry Recognized Credentials) in that same POS in the report year.

The POS of the above learner earns three CP points with the following breakdown:

- One learner credit-based point
- One CTE Industry Recognized Credential point. The POS is limited to a maximum of one CTE Industry Recognized Credential point per learner even when a learner earned multiple CTE IRCs in the POS.
- One underrepresentation point as participant in an IEP

Example 3

An Asian-American learner has completed four credits in a single CTE POS and is flagged as economically disadvantaged.

The POS of the above learner earns two CP points with the following breakdown:

- One learner credit-based point
- One underrepresentation point. The POS is limited to a maximum of one underrepresentation point per learner even when a learner is a member of more than one of the specified focal student groups.

CP Allocation Calculation Methods

Points

CP points are used to determine allocation of the Oregon Secondary CP funding.

The allocation value of a CP point varies year-by-year because the total grant funds vary year-by-year; then the total grant is divided each year by total CP points across Oregon for that report year's per-point value.

Please note that the allocation equation below is *generalized*. The per-point dollar value of CP points and the CTE POS allocation total is subject to minimum or maximum funding thresholds.

Numerator: Total CTE POS points for all Oregon Schools for the report year

Denominator: Total sum of CP points for all Oregon schools in the report year

Annual Disbursement Thresholds

The minimum disbursement to a qualifying secondary CTE POS is \$2,000.

The maximum disbursement to a qualifying secondary CTE POS is \$45,000.

CTE Coordinator Grants

The CTE regional coordinator is expected to shepherd the consultation described below. Because of that added work, there is a support grant. Prior to dividing the annual grant total among the CTE POS points, \$300 for each qualifying point is taken from the total and funds the support grant for Secondary CP funding.

The support grants are disbursed to the respective CTE coordinator.

Timeline

May-July:

- CTE Student and Course Collections are submitted by districts.

September-November:

- Credentials are submitted in the CTE Student Collection [Industry Recognized Credential](#) (IRC) fields.
 - Submitted to the [CP email](#)

November-January:

- Allocations are generated, approved, then posted on the ODE website, and sent to Procurement.

December-January:

- Applications will be available for submission. Applications must be approved prior to spending funds. Please see below for information about the application requirements.
- New grants will be created during the first year of the biennium and supplemented the second year. Reimbursement can be claimed through ODE's Electronic Grant Management System.

June 30 of the fiscal year:

- All funds must be spent and items received.

- During the first year of each biennium, districts can request an extension to spend funds on summer opportunities. This extension is not available in the second year of each biennium.

August 14 of the fiscal year:

- All claims must be submitted.

September 30 of the fiscal year:

- Final report is due on expenditure of funds for both years of funding (if applicable). There will be a process for this, and guidance will be provided at that time.

21.2 CTE Revitalization Grant Program

The CTE Revitalization Grant is a program established in 2011 through [HB 3362](#), then reaffirmed each following biennium. This competitive grant program strengthens the alignment of CTE, workforce development, and economic development. The grant program has continued to grow, with funds reaching more than 170 projects throughout the state since its inception.

Focus:

- Grants help upgrade facilities and equipment so that programs can better align with the needs of postsecondary education partners and industry.
- Learners, teachers, and community members describe how these grants help build a sense of professionalism as program participants work with state-of-the-art equipment in clean and safe facilities.
- Awardees represent a rich diversity in terms of geography, school size, and program focus.
- For more information:

Email the [ODE CTE Revitalization Team](#)

Visit the [CTE Revitalization Grant web page](#)