

FISCAL RESPONSIBILITY

FROM OKLAHOMA TECH PREP 101 A GUIDE FOR THE NEW COORDINATOR

As a Tech Prep Coordinator, you will have responsibility for the way that your Tech Prep funds are used. Please use the MOU and Fiscal Responsibility section of this manual as a guide for your expenditures.

Reimbursement Form

Are you using the correct form? The FY2007 Reimbursement form has been updated and it now includes two columns for Salary (Coordinator & Other) and for Benefits (Coordinator & Other).

Reimbursement Claims

Reimbursement claims are due Quarterly in October, January, April, and August.

Budget Revision

There is no Budget Revision form. You need to simply contact (email, fax, etc) the state fiscal agent and they will work with you to make the revision.

Unallowable Expenditures

NO MEALS as they are not allowable expenditures and will not be reimbursed!

NO LOCAL MONEY should show up anywhere on the reimbursement form. You can only be reimbursed for expenditures that are within the Federal Allocation amount.

Budget Revision and Reimbursement Claim Form

No category's expenditures may exceed the budgeted amount by more than 10%. If you see that expenditures are going to exceed budgeted amounts by more than 10%, a Budget Revision has to be requested, with explanation, by email, to Debbie Baumert. Once the revision is approved, she will email you a copy of a "new" budget reflecting the revision. The new Budgeted amounts should be the amounts used in the top line "Federal Tech Prep Budget" on your Reimbursement Claim form.

Allowable Tech Prep Expenditures FY 2007

Note: The following are the approved Tech Prep expenditure categories and examples of the activities which may be included in each category.

Object Series 100 & 200

Salary & Benefits

Salary and benefits for a part-time or full-time consortium coordinator *not to exceed 50% of consortium's federal Tech Prep allocation*. Time and effort reports must be maintained if the coordinator's time is split between Tech Prep and another federal project or a local project. If coordinator performs only Tech Prep activities and funding is split between the Tech Prep federal grant and local funds, no time and effort reporting is required.

Salary and benefits for a part-time or full-time consortium secretary to help set-up and monitor the consortium budget, prepare reports on program activities, prepare and monitor purchase orders, provide clerical support, etc. *Must be charged as an administrative expense and therefore is limited to 5% of the consortium's federal Tech Prep allocation*. Time and effort reports must be maintained if the secretary's time is split between Tech Prep and another federal project or a local project. If the secretary performs only Tech Prep activities and funding is split between the Tech Prep federal grant and local funds, no time and effort reporting is required.

Stipends

Stipends for staff off regular contract (during the summer) to develop program articulation agreements, course competencies, etc.

Stipends for secondary/postsecondary staff off regular contract (during the summer) to plan, develop, align, integrate and implement new or enhanced academic, occupational/technical instruction or courses.

Substitute Salaries

Substitute salaries not to exceed the recommended school district rate, which may vary from \$40 to \$100 depending on the demand and geographic region of the school district. Applicable to:

- Secondary/postsecondary faculty to review course competencies, identify equivalent courses, complete the articulation process and develop student materials on advanced standing opportunities.
- Secondary faculty or staff to develop integrated/articulated curriculum materials, develop pathway course selection guides by career cluster area, design student/parent advising guides, etc.

- Secondary faculty to develop/adapt materials which incorporate advisement and work-based learning activities as part of the curriculum (e.g., co-op, shadowing mentoring, career practicum service learning, volunteer activities, Teachers as Advisors, etc.)

Extra Duty Contracts

Extra duty contract pay for Tech Prep site implementation activities

Object Series 300

Professional Services

Consultant services to assist secondary and postsecondary staff directly involved with Tech Prep curriculum activities.

Consultant services to conduct professional development directly related to Tech Prep implementation.

Object Series 400

Purchased Property Services

Office space rental for the Tech Prep coordinator. *Must be charged as an administrative expense which is limited to 5% of the consortium's federal Tech Prep allocation.*

Object Series 500

Other Purchased Services

Printing expenses which may include:

- Materials for students, parents, and others that would implement the Tech Prep curriculum; implement career exploration activities and disseminate career information targeted by the Tech Prep curriculum; and explain job placement opportunities and postsecondary program opportunities.
- Student advisement guides, articulation handbooks, career related materials, consortium brochures, etc.

Postage expenses involved in operating the Tech Prep coordinator's office.

Telephone expenses involved in operating the Tech Prep coordinator's office.

Travel expenses for participants directly involved in Tech Prep career clusters/pathways implementation to attend appropriate State and/or National conferences. Travel expenses, including meals/per diem/registration, lodging, and mileage, to be paid according to the fiscal agent's policies and approved rates. *Out-of-state travel must be pre-approved by the State Tech Prep Office.*

Object Series 600

Supplies

- Instructional materials, books, and supplemental materials (print, video, software) to implement integrated contextual/applied

learning for grades 7-12 in both vocational and academic classrooms directly involved in the Tech Prep clusters/pathways.

- Materials to assist secondary and postsecondary staff directly involved with Tech Prep curriculum activities.
- Materials to conduct professional development directly related to Tech Prep implementation.
- Career guidance and counseling materials (print, video, software) to assist 7-14 grade students understand career opportunities associated with the Tech Prep program.
- Instructional materials for special needs students to help ensure their success in Tech Prep coursework.
- Materials for students, parents, and others that would implement the Tech Prep curriculum, implement career exploration activities and disseminate career information targeted by the Tech Prep curriculum, and explain job placement opportunities associated with the Tech Prep program.
- Light refreshments such as coffee, soft drinks, and snacks (no meals) for small working meetings.

Object Series 700

Property

All equipment purchases must be *pre-approved* by the State Tech Prep Office. The State Tech Prep Office defines equipment as any one item with a cost of \$250 or more.

Object Series 800

Other Objects

Membership dues for the National Association of Tech Prep Leadership (NATPL) and the National Tech Prep Network (NTPN). ***Pre-approval is required for membership dues.***

Registration for conferences/meetings where more than 75% of the total program is directly related to Tech Prep.

Un-Allowable Tech Prep Expenditures FY 2007

The following expenditures are not allowable uses of Federal Tech Prep funds:

1. Hiring of staff other than the coordinator and secretary.
2. Using funds to supplant existing activities or salaries.
3. Paying stipends to secondary/postsecondary faculty or counselors currently under contract to participate in in-service sessions, institutes, workshops, or other professional/staff development activities.
4. Using funds to purchase “incentives” for students who improve their academic performance (i.e., sports tickets, dinner coupons, etc.).
5. Using funds to provide students with “stipends” for participating in summer programs, career exploration camps, or other related types of activities.
6. Using funds to attend conferences/meetings where less than 75% of the total program is directly related to Tech Prep. For example funds are not to be expended for secondary and postsecondary teachers, counselors and administrators to attend their professional (discipline) organization activities that they normally would be expected to attend.
7. Using funds for banquets, luncheons, dinner, and breakfast meets. (Light refreshments such as coffee, soft drinks, and snacks are allowed for small working meetings.)
8. Remodeling of facilities.
9. Promotional or public information materials (t-shirts, coffee mugs, etc.).
10. More than 50% of Tech Prep funds used for coordinator salary and benefits.
11. Exceeding 5% of the consortium’s federal Tech Prep allocation for administrative costs.
12. Forming a consortium with less than a \$50,000 consortium total. A consortium contribution must be added if the federal Tech Prep allocation is less than \$50,000. The consortium contribution can be in the form of office space for the coordinator or providing a portion of the coordinator’s salary/benefits.