

BUSINESS & INDUSTRY SERVICES

ECONOMIC & WORKFORCE DEVELOPMENT



OKLAHOMA DEPARTMENT OF CAREER & TECHNOLOGY EDUCATION

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BUSINESS AND INDUSTRY SERVICES

Economic & Workforce Development Information

PROGRAMS

Apprenticeship

Adult and Career Development

Safety for Government Entities or Safety for Industry

Customized Industry or Government Training

Client-Based Consulting Services

Training for Industry Growth

Truck Driver Training

Training for Industry Program

Firefighter Training

Oklahoma Bid Assistance Network

Safety Training Grants

Innovation Training Grants

Incubators

Acronyms Defined

ACD	Adult and Career Development
BES	Business Entrepreneurial Services
BIS	Business and Industry Services
CTIMS	CareerTech Information Management System
DLA	Defense Logistics Agency
DOD	Department of Defense
EDI	Economic Development Initiatives
EPCS	Education Partnerships and Customized Services
ESL	English as Second Language
FFT	Firefighter Training
FQ	Fiscal Quarter
FTE	Full-Time Equivalent
GED	General Education Development
IMD	Information Management Division at ODCTE
MIS code	Management Information System Code
MOU	Memorandum of Understanding
OBAN	Oklahoma Bid Assistance Network
ODCTE	Oklahoma Department of Career and Technology Education
OJT	On the Job Training
OMES	Office of Management and Enterprise Services
OSDH	Oklahoma State Department of Health
PEF	Program Enrollment Form
PID	Position Identification
PTAC	Procurement Technical Assistance Center
RC	Regional Coordinator (formerly BIS Agent)
SAS	Local Student Accounting System
SBM	Small Business Management
SET	Self-Employment Training
TIG	Training for Industry Growth
TIP	Training for Industry Program

General Information

The Economic Development Initiatives information is intended to define the basic principles for how the Oklahoma Department of Career and Technology Education will exercise stewardship of taxpayer dollars through formula funding, Economic Development Initiatives funding and specific program funding. These initiatives are administered by the Education Partnerships and Customized Services (EPCS) division of the Oklahoma Department of Career and Technology Education. Oversight is provided by ODCTE administration. Specific questions regarding funding or other topics of interest about the initiatives may be directed to the appropriate Regional Coordinator or EPCS staff member.

FUNDING:

Education Partnerships and Customized Services operate several different programs and initiatives. Funding comes from various sources and may result in specific requirements and/or limitations being included in the agreements based on the source of funding used. Participation in training initiatives using these funding sources is determined by the local technology center in collaboration with EPCS. Sound business principles and statewide economic impact will be considered when determining the scope of each project funded.

Funding is intended to support costs incurred by a technology center in offering classes and training services for businesses in the district. The most reasonable point of accountability in the design and delivery of these classes remain at the technology center level. The particular circumstances surrounding a given class offering is a matter of local determination.

1. Funding is intended to promote low cost and high quality training for Oklahoma's existing industries. This funding is directed to the Customized and Safety Training formula. Technology Centers receive an allocation based on eligible contact hours, new and repeat customers served, and a base amount received by all technology centers. (See FY18 funding definitions in Appendices for performance funding distribution detail).
2. Project funding is also directed to Training for Industry Growth and Training for Industry Program and is intended to serve companies who export goods and services and/or supply exporters in the following identified ecosystems:
 - Manufacturing
 - Aerospace and Defense
 - Energy
 - Transportation and Distribution
 - Agriculture and Biosciences
 - Information and Financial Service
 - Health

Based on availability, funding is provided for preventive Safety for Government Entities or Industry, Customized Training, Incubator Programs, Safety Grants, Innovation Training Grants, Firefighter Training, and Oklahoma Bid Assistance Network. Refer to the specific program type sections to obtain specific guidelines for funding eligibility. Participation in training initiatives using this funding source is determined by the local technology center.

Technology centers are encouraged to analyze the training needs of industries within their communities and design training programs for those companies that have the greatest ability to benefit. Items that technology centers may include in funding agreements are instructor salaries, training related equipment, curriculum development and instructional supplies. Funds may not be used for indirect costs, building construction, remodeling or leasing facilities. Technology centers may be encouraged to pool resources for larger projects and for industries that are served by more than one technology center district. Curriculum development will be reimbursed up to 2% of the total training request, not including consumables, supplies, books, etc.

INVOICING FOR PROJECT FUNDING PAYMENTS (TIP, TIG, Firefighter, etc.)

Reimbursement for incurred costs included in the approved agreement budget will be processed in CTIMS. See page 18 for CTIMS information.

Technology centers are required to submit all necessary documents to receive reimbursement from ODCTE no later than the end of the quarter following the expenditure. Final quarter requests **will not be accepted after August 15 following the end of the fiscal year.**

Training Dates	Invoicing Due By
July 1 – September 30	December 31
October 1 – December 31	March 31
January 1 – March 31	June 30
April 1 – June 30	August 15

First quarter ends on Sept. 30
Second quarter ends on Dec. 31
Third quarter ends on March 31
Fourth quarter ends on June 30

PERFORMANCE AND PRODUCTION FUNDING PAYMENTS (CUSTOMIZED & SAFETY)

Customized and Safety Payment Process

- 1) At the beginning of each fiscal year and based on available funds, the agency provides each tech center with their fiscal year allocation.
- 2) The customized and safety training line item will be paid to the school in 12 equal monthly payments at the same time operations payments are made. Payments will no longer be based on eligible contact hours generated during the current year, but rather the total allocated amount, utilizing the BIS funding formula, for the current fiscal year.
- 3) Tech center conducts training and submits required documentation to ODCTE.
- 4) ODCTE data staff conducts review of data submitted. In order to calculate eligible contact hours for use in the funding formula, the following criteria must be met:
 - a. Program Type 31 Criteria:
 - i. Students submitted with an industry code will be counted EXCEPT for those employed by a state government, federal government, tribal government, education entity or those coded as open enrollment (99999). The tribal business entities such as casinos, stores, or hotels will be included.
 - b. Program Type 21 Criteria:
 - i. All courses that meet the program type 21 definition will be included. This will include government, tribal government and educational entities. Those not meeting the program type 21 definition may be submitted as a program type 31. The only exclusions in this category will be for those students coded as open enrollment (99999).
 - c. Program Type 15 Criteria:
 - i. Students submitted with an industry code will be counted EXCEPT for those employed by a state government, federal government, tribal government, education entity or those coded as open enrollment (99999). The tribal business entities such as casinos, stores, or hotels will be included. Payment for eligible contact hours in program type 15 will be included with program type 31.
- 5) Finance will process payment to the tech centers based the fiscal year allocation. Total annual payments to each tech center will not exceed their annual fiscal year allocation
- 6) Tech center receives payment and records using the revenue codes listed below:
 - a. Type 31 - OCAS Project code 433, Revenue code 3833
 - b. Type 21 - OCAS Project code 448, Revenue code 3848

REPORTING ENROLLMENTS:

ALL enrollments can be submitted – regardless of funding eligibility.

Classes and enrollments for all classes and/or seminars conducted or coordinated during each quarter are submitted a minimum of once each quarter by the dates listed in Information Management Division’s “Technology Centers Instructions for Providing Enrollments and Class Data.”

Quarterly reports are due on the 15th after the end of the quarter. Below are important dates to remember in the reporting process:

- First quarter due October 15.
- Second quarter due January 15.
- Third quarter due April 15.
- Fourth quarter due July 15
- Data is final on August 15 following end of the fiscal year.

See BIS Enrollments Technical Guidebook for reporting: <https://www.okcareertech.org/about/state-agency/divisions/imd/ctims/EDICompleteProcess.pdf>

INELIGIBLE ACTIVITIES:

Listed below are examples of activities **not** eligible for reimbursement using any of the BIS funding sources:

- Professional development for technology center personnel or boards of education (with the exception of safety training).
- Political or community fund raising activities.
- Religious organization meetings or functions.
- Receptions, meal functions or style shows.
- Commercial exhibits, fairs or promotional activities.
- Open houses or student organization meetings.
- Industry, public school or organizational staff meetings, conventions or team meetings.
- Non-commercial driver education courses, DUI school or driver improvement and defensive driving classes delivered as open enrollment classes.
- Job search, career exploration, employment skills, career development and career search.
- Training conducted for incarcerated people or students who are not residents of Oklahoma.
- Driving time.
- Hunter safety, boat safety or concealed weapons training and recreational activities/training.
- Third-party rental of facility use.
- Lab preparation time.

Even though the above-mentioned activities are not eligible for reimbursement using the BIS funding sources, they may be reported as Informal Training (Type 60), Community Services (Type 61), Career Services (Type 62) or Facility Usage Only (Type 75), all of which are classified as non-reimbursable classes.

TRAVEL REIMBURSEMENT:

When travel is approved as a budgeted item in an initiative agreement, reimbursement will be made according to these state guidelines:

Allowable:

- a. Mileage at state or federal rate (gsa.gov).
- b. Lodging at state or federal government rate (gsa.gov).
- c. **Travel reimbursement is limited to no more than 5% of the total training agreement.**
- d. Airfare requires a 21-day minimum advance purchase in coach class. Reimbursement will be based on the lesser of an agreed upon standard round-trip fare or the actual cost. Example: If the agreed upon round-trip fare is \$300 and the actual cost is \$1,200.00, the company will be reimbursed \$300.00. If the actual cost of airfare is \$250.00, the company will be reimbursed \$250.00.

Not allowable:

- a) Per Diem is not an allowable expense.
- b) Fees for luggage check is not an allowable expense.
- c) Rental car/taxi/Uber, etc. fees are not allowable expenses.

TRAINING FOLLOW-UP INTERVIEW AND DATA COLLECTION:

A follow-up interview is to be conducted with each business served through a BIS funding agreement at the conclusion of the funding agreement. The information collected will be used to demonstrate accountability to the taxpayers of Oklahoma and quality assurance for our system. All information provided will remain confidential. The information will be aggregated as part of consolidated reporting of all businesses, industries, agencies and organizations receiving BIS services and will not be presented in any company-identifiable manner. Information will be submitted by the technology center.

Information from the follow-up interview is due no later than July 31 following the end of the fiscal year.

RESPONSE TIME:

Agreements and change requests will be reviewed and approved or rejected within five to seven business days.

Specific Information for Each Program Type

The following considerations should be used when determining eligibility for BIS funding and appropriate program type for the training services provided for the business client. Specific questions regarding funding, guidelines and program type should be directed to the appropriate Regional Coordinator.

Apprenticeship – (Type 01)

This program type is used for apprenticeship classes prescribed by the apprentice’s sponsor and approved by the Bureau of Apprenticeship and Training.

Adult and Career Development– (Type 15)

This program type is used for Adult and Career Development training that provides individuals avenues to develop the skills and competencies they need to succeed in today’s workplace. Through ACD classes, adults participate in learning opportunities to develop new and emerging job skills, ease workforce transition, or enhance career development. ACD training offers technical skills training, continuing education, professional development, and career development learning opportunities to individuals **16 years or older**. They are offered as open enrollment, short-term classes, seminars and occupational preparation classes.

Note: beginning in FY19, report all personal interest classes as a non-reimbursable type code listed on pages 12-13.

Reporting Enrollment Hours

If less than 50% of the students in a class are sponsored by their employer, the entire class must be reported as a type 15.

If the majority (50% or more) of the students in a class have an eligible employer reported to their student record, the entire class should be reported as a Type 31. They do not all have to be sponsored by the same employer. Eligible employer means the student is employed by the business and the training is job-related.

Funding

Hours of enrollment sponsored by the business for which the student is *currently employed* will be pulled out and the allowable contact hours will be counted in the Customized & Safety Training formula. Allowable means there is an eligible employer reported on the student enrollment record *sponsoring the job-related* class and/or training.

- ACD classes conducted in a technology center district by another technology center are eligible for formula funding if approved by the technology center assigned to that district.
- Company sponsored students in an ACD class will be pulled out and the contact hours will be counted in the Customized & Safety Training formula.

On-Line classes should have **(OLT)** after the class name, e.g. Ladder Safety (OLT). These are self-paced or instructor-facilitated classes that are considered a complete instructional unit delivered over the Internet or via the computer to students primarily located at distance learning locations.

In reporting program type 15 On-Line Training, use the number of completion hours established by the class developer as the number of clock hours, and report all students who completed the training during the quarter. Only report a student once per class. The maximum number of times any specific on-line class would be reported during a fiscal year is four. These classes should be reported with the applicable Business Code and the name of the developer in the space provided for "Instructor."

In the event the On-Line class was conducted in a program type 31, 42, or 52, please report enrollments quarterly for those students who completed the training for the quarter being reported.

Safety for Government Entities or Safety for Industry – (Type 21)

This program type is used for safety training intended to help private or public organizations plan and implement safety processes and providing ongoing training to assure safe work environments for Oklahomans. This is done by providing quality ~~preventative~~ safety training. The following ~~Reactive~~ training does not qualify for reimbursement: First Aid, CPR, and Train the Trainer.

The Oklahoma legislature challenged the CareerTech System to provide competent occupational safety and health training to private and public sector employees at a reasonable cost. Technology centers delivering training to clients under this category will receive performance funding according to the customized and safety training formula on a contact hour basis.

Online safety courses are eligible for reimbursement. Safety courses conducted solely by DVD/video tape are not eligible for reimbursement.

On-Line classes should have **(OLT)** after the class name, e.g. Ladder Safety (OLT). These are self-paced or instructor-facilitated classes that are considered a complete instructional unit delivered over the Internet or via the computer to students primarily located at distance learning locations.

In reporting program type 15 On-Line Training, use the number of completion hours established by the class developer as the number of clock hours, and report all students who completed the training during the quarter. Only report a student once per class.

The maximum number of times any specific on-line class would be reported during a fiscal year is four. These classes should be reported with the applicable Business Code and the name of the developer in the space provided for "Instructor."

It is vital that technology centers assure that their clients have a workplace strategic plan for safety in place. This plan is a guiding force for safety training. Funding for strategic safety plan development is available through several EDI and safety initiatives. Safety plan development is limited to 40 hours of maximum reimbursement.

Training that addresses site-specific hazards are to be a priority for any training provided for the client. Class sizes are to be monitored to ensure high quality instruction.

Skills to Rebuild – (Type 22)

This program type is used for specific training done in direct response to a declared emergency by the Governor's office or a direct response to a natural disaster. Specific approval and funding is provided on a case-by-case basis.

Customized Industry Training or Government Entity Training – (Type 31)

This program type is used for customized training that is designed specifically for the employees of one or a specific group of businesses or industries or public sector organizations. Customized industry training qualifies for contact hour performance funding under the Customized & Safety Training formula. **State, federal, and tribal government or organizations do not qualify for performance funding.**

Eligible Government Entities: Local City Government, Local County Government, & Tribal Industries

Non-Eligible Government Entities: State Government, Federal Government, Tribal Government, & Education

The purpose of formula funding for Customized Industry Training and Government Entity Training is to support costs incurred by a technology center in offering these classes. The majority of students enrolled in the class must be employer sponsored. Training must be job-related. No special funds are available. Accounts are settled with monthly payments based on the funding formula allocation.

For On-line classes, please see Class Type 15.

Please Note: The technology center must have material participation in the delivery of the classes or seminars. Material participation is defined as accepting enrollments and the coordinator providing one or more of the following: coordination of instructor(s), marketing of class, and design and/or provide curriculum.

Client-Based Consulting Services – (Type 32) (non-reimbursable)

This program type is used for client-based consulting services provided for small business owners and aspiring entrepreneurs. These programs may be focused locally as business and entrepreneurial services, business development programs, self-employment training, small business management, agribusiness management, incubator, and/or management development group.

Client-based services are offered for business owners and aspiring entrepreneurs by coordinators at the technology centers. The coordinator will partner with business owners and entrepreneurs as they create healthy, dynamic and successful long-term business ventures that grow jobs and contribute to the economic vitality of the local workforce and community.

The information submitted using program type 32 is not included in any funding calculations, nor is it used in the annual expenditure/cost reports. These coordinators are approved and included in the equalization formula at a specific position equivalent value. All the activity conducted by these approved coordinators is included as part of the position equivalent value. The annual reports capture that position equivalent value and the associated expenditure.

Program type 32 should only be used by tech centers with approved client-based coordinators.

Reporting as a Type 31

Classes or seminars may be submitted as Type 31 if the criteria below is met:

1. If the majority (50% or more) of the students in a class have an eligible employer reported on their student record, the entire class should be reported as a Type 31. They do not all have to be sponsored by the same employer.
2. The coordinator did not deliver the training, but had material participation. Material participation is defined as accepting enrollments **and** the coordinator providing one or more of the following: coordination of instructor(s), marketing of class, and design and/or provide curriculum.

Funding

If the coordinator's position is included in the technology center equalization formula, then the hours **are not** eligible for funding if they delivered the training.

If the coordinator did not deliver the training, but had material participation in the delivery of the classes or seminars, the hours may be eligible hours in the Customized & Safety Training formula by meeting the Type 31 reporting criteria above.

Please Note: Classes or seminars taught or coordinated may be submitted as Type 31 with the enrollments included in formula and performance funding calculations if the majority of students are employer sponsored.

Please Note: The technology center must have material participation in the delivery of the classes or seminars. Material participation is defined as accepting enrollments and the coordinator providing one or more of the following: coordination of instructor(s), marketing of class, and design and/or provide curriculum.

See BIS Enrollments Technical Guidebook for reporting: <https://www.okcareertech.org/about/state-agency/divisions/imd/ctims/EDICCompleteProcess.pdf>

Training for Industry Growth – (Type 42)

This program type used for training to accommodate industry identified skilled workforce shortages within an occupational area by providing customized training for needs of that industry within a defined geographic region of the state. TIG funding is based upon the availability of state appropriated funds.

JUSTIFICATION:

Oklahoma's economic recovery and sustainability depend on the ability of technology centers to provide training for industry during times when unusual growth or workforce shortages have been identified. Technology centers have a duty to respond to these needs by designing customized training for multiple companies that are experiencing similar needs. The Training for Industry Growth Initiative funds will allow technology centers to establish more training agreements with multiple members of business and industry who are experiencing common critical skilled workforce shortages.

METHOD FOR DISTRIBUTING FUNDS:

Because of limited resources being available for this training, a limited number of projects will be approved for the fiscal year. Technology centers with approved projects will be reimbursed on a project-by-project basis for training programs designed to meet specific needs of companies experiencing critical needs within their districts.

ELIGIBILITY CRITERIA:

This initiative is intended to assist industry by providing high quality completers in their specific area of need. Technology centers are encouraged to use these funds to support local industry experiencing a critical skilled workforce shortage. The project should be designed to meet only the critical immediate need. It is considered to be a **short-term** solution. Short-term is defined as 3-5 years. Program completion must result in job attainment.

To qualify for TIG funding, technology centers and companies must make the following commitments:

Technology Center Commitments:

- A needs assessment identifying commonalities for all companies will be performed.
- Industrial coordinator and instructor will design the program to meet the standards identified by the needs assessment as the minimum skill requirement for current vacant positions
- Generate a statement of understanding (SOU) between ODCTE and the technology center in CTIMS to define specifically what was agreed upon.
- After SOU is acknowledged and approved in CTIMS by the appropriate technology center and ODCTE staff, a purchase order will be assigned by the ODCTE Finance Division. Training cannot begin until the agreement has been assigned a purchase order number.
- Once the trainees have completed training and are hired, the technology center will conduct a survey on wages for those hired and follow up after one year with another survey (economic impact report - CTIMS).

Company Commitments (Qualifications):

- Demonstrate/verify worker shortage.
- Demonstrate active recruitment of workforce required to fill the number of vacancies.
- Make technical experts available to meet with representatives of the technology center and RC to assist with the identification of common skill requirements.
- After course completion, the company will hire the workers it sponsored if they are still eligible for employment and will have the option of hiring other program completers who were not sponsored by a specific company.

Targeted Industry Sectors:

- Manufacturing
- Aerospace and Defense
- Energy
- Transportation and Distribution
- Agriculture and Biosciences
- Information and Financial Service
- Health

Funds may **not** be used for indirect costs, building construction, remodeling or leasing facilities.

PROJECT APPLICATION:

All Training for Industry Growth Initiative projects must be approved prior to the project contract start date. Application and reimbursement for TIG projects will be accomplished through the CTIMS system.

MODIFICATIONS:

All changes made to Training for Industry Growth Initiative projects must be approved prior to beginning the affected training.

REQUEST FOR PAYMENT AND REPORTING PROCESSES:

Each technology center will submit a copy of PEFs that have been uploaded into IMD. Each technology center will use the process described in the "Instructions for Providing Secondary and Adult Program Enrollment Data." Reimbursement for costs will be processed upon receipt of invoice. Requests for payment may be submitted as expenses are incurred.

Upon completion of a class, all documents must be filed with ODCTE for reimbursement not later than the quarter following the completion of the class. Final quarter requests will not be accepted after July 31 following the end of the fiscal year.

For On-line classes, please see Class Type 15.

PARTIAL PROJECT REIMBURSEMENT REQUESTS: Partial payment requests will be accepted for longer-term projects for which official IMD PEFs are not submitted until project completion. These requests for payment can be submitted by attaching a local student accounting system data report. Such SAS data must include information equivalent to an IMD PEF. An IMD PEF will still be required upon final request for payment on a completed project.

EQUIPMENT PURCHASES

Equipment purchases up to \$2,400.00 are allowed and will be approved on a project-by-project basis. All equipment purchased will become part of the technology center inventory.

TECHNOLOGY CENTER STAFF:

Training must be delivered by a technology center staff member or adjunct instructor. The reimbursement rate will continue to be \$40 (the \$40 includes FICA) per hour for technology center staff members. The maximum rate for an adjunct instructor will be \$40 (the \$40 includes FICA) per hour.

Training for Industry Growth Initiative funds are intended to supplement, not replace, the business and industry services budget at the approved technology center. TIG enrollment should be submitted as a Type 42.

TRAINING FOR INDUSTRY CREDENTIALS:

In the event training is being conducted for the purpose of industry certification, reimbursement will be provided based upon the greater of \$300 per completer or the allowable instructor reimbursement rate for technology center instructor, adjunct instructor, or contract trainer. In order to qualify as training for industry certification, there must be an industry-recognized certification examination associated with student completion.

Truck Driver Training – (Type 44)

This program type is used for Central Technology Center Truck Driver Training offered as refresher classes designed for individuals who are not receiving training to become professional truck drivers through the statewide truck driver-training career major offered at Central Technology Center. Examples of these classes would be train the trainer or bus driver training. Clock hours for these classes will not be calculated in the funding formula.

Training for Industry Program – (Type 52)

This program type is used for high quality training for new companies considering coming to Oklahoma or for Oklahoma companies that have plans to expand their workforce, resulting in net-new jobs in Oklahoma. The program also provides leadership and funding to technology centers to help build lasting partnerships with companies while providing high quality workforce training so that companies can be productive from day one. Companies may be identified in a number of ways including Department of Commerce, local Technology Center coordinators, chambers of commerce, economic development authorities, etc. Companies not located in a technology center district will have training delivered by the most appropriate organization or technology center. State Regional Coordinator will work together with the technology center to develop the agreement.

JUSTIFICATION:

Growing Oklahoma's economy will largely depend on the ability of technology centers to provide start-up training for new and expanding companies.

Frequently this requires completely customized and flexible training to ensure a skilled workforce. The Training for Industry Program funds will allow technology centers to assist Oklahoma companies as they create and grow new jobs by providing high quality training at low or no cost to the company. TIP is designed to support companies that are creating new jobs in Oklahoma that produce goods or services that are exported outside the state of Oklahoma thereby importing wealth back into Oklahoma.

METHOD FOR DISTRIBUTING FUNDS:

Based on the availability of funds, TIP projects will be funded based on a scoring process utilizing the Return on Investment (ROI) calculator to generate a score. Those proposals with the most ROI will have priority in funding. A cut score could keep a TIP from being eligible for funding. Once funds are designated for specific TIP project, the following timeline must be followed:

1. Upon allocation of TIP funds to a technology center, an agreement must be initiated in CTIMS, by the Industrial Coordinator or designee, within fifteen (15) business days.

2. Training must begin within sixty (60) calendar days of the purchase order being entered into CTIMS. If training does not start, the technology center will receive a thirty-day (30) notice that the contract is terminated. Status of training will be verified by the Regional Coordinator through active invoicing, current program enrollment forms ((PEFs), or dated sign-in sheets/rosters.
3. If training can't be verified within sixty (60) calendar days, the agreement will be terminated.

ELIGIBILITY CRITERIA:

*Training must be for full time, permanent jobs. Full time is considered 30 hours or more a week.

*Net new jobs must provide a comprehensive benefit package with 50 percent of the benefits being company paid within 180 days of hire.

*Employees are considered to be a new hire after the TIP allocation meeting with the Company, Technology Center Coordinator and State Regional Coordinator has occurred. If hired before TIP meeting with Regional Coordinator, employees are not considered for the TIP.

*Temporary to permanent employees are eligible for TIP. Contract or letter from temp agency required for proof that they are temp to hire.

*Company must fit into an ecosystem as described on page 1.

*State RC's will work together with the technology center to develop the agreement.

*Companies not located in a technology center district will have training delivered by the most appropriate organization or technology center.

*A statement of understanding between ODCTE and the technology center is generated in CTIMS to define specifically what was agreed upon.

*Workkeys can be paid for under TIP agreements.

*On the job training (OJT) does not qualify.

*Any TIP paid training that works with tangible items or services CANNOT enter the chain of commerce.

*TIP cannot be used for attrition, turnover, or retention. Companies who have downsized under the following circumstances however may be eligible for TIP:

Layoffs (more than one-year-old) – Companies that incurred layoffs more than one year ago are eligible for TIP when they create new jobs. Their new baseline job count will be the number of employees at the time of the request for TIP.

Downsized Companies – Companies that downsize as a result of increased efficiencies and then add new jobs to add product lines or increase output will qualify for TIP.

Downsized Companies with No Previous TIP Agreement – An otherwise qualifying company that has never received TIP services is eligible regardless of past employment fluctuation when it creates new jobs. Its baseline job count begins at the point it starts its first TIP agreement.

PROCESS:

Each technology center will:

1. Inform qualifying companies that TIP funds may be available; provide basic information on TIP process, and perform a preliminary training needs assessment.
2. Technology Center Coordinator contacts Regional Coordinator to review company's TIP eligibility prior to meeting with company.
3. Schedule a meeting with the company, Regional Coordinator, and Technology Center Coordinator to review TIP eligibility, discuss TIP process, and next steps if applicable.

4. Submit the appropriate worksheet in CTIMS and attach the CTIMS EDI budget proposal (.xlsx) within seven business days of the start date of the training. The proposed budget (.xlsx) will provide details outlining specific **direct** costs associated with the training, including approximate start date of training.
5. Generate a statement of understanding (SOU) between ODCTE and the technology center in CTIMS to define specifically what was agreed upon.
6. After SOU is acknowledged and approved in CTIMS by the appropriate technology center and ODCTE staff, a purchase order will be assigned by the ODCTE Finance Division. Training cannot begin until the agreement has been assigned a purchase order number.
7. Initiate a change request in CTIMS for any project changes, as soon as possible, if project conditions warrant the re-assignment of funds (see Change Request Process Mapping page 22).
8. Initiate a change request in CTIMS should funds be available for release as soon as it is evident training will not occur or all allocated funds will not be utilized.
9. Invoice ODCTE to request payment via CTIMS for direct costs associated with the agreed upon training budget. Appropriate documentation will be required. (See Reimbursement Checklist).

ODCTE will:

1. Discuss the TIP process with Technology Center Coordinator and will review the company's TIP eligibility prior to meeting with company.
2. Attend budget planning meeting (s) with the company and Technology Center Coordinator to provide assistance with the TIP process and address any questions.
3. Review each eligible application and notify the technology center within seven business days in CTIMS when the application is approved or rejected.
4. Build agreements in CTIMS.
5. Review each eligible change request and notify the technology center in CTIMS when the change has been approved, rejected or denied. Note: ODCTE has seven business days to approve, reject or deny a Change Request.
6. Process all appropriate requests for payment (invoices) within 20 business days. Upon invoice final approval, technology center treasurers will receive payment from the Office of Management and Enterprise Services for direct costs in accordance with the approved application.

PROJECT APPLICATION:

TIP projects will be applied for in CTIMS and will be considered for approval on a project-by-project basis. All qualifying projects must be approved through the State Manager of Education Partnerships and Customized Services to be considered ready to train. The official start date of the project will be reflected in CTIMS. No reimbursable training is to take place before the agreement is approved in CTIMS.

PROJECT CHANGES:

All proposed project changes must be submitted in CTIMS prior to the requested modification becoming active. Change requests must be submitted proactively. Retrospective change requests will be rejected, and will result in forfeiture of ODCTE reimbursement.

REIMBURSEMENT:

Items that technology centers may include in funding agreements are instructor salaries, training related equipment, curriculum development (up to 2% of the total TIP training funds, excluding consumables), and instructional supplies. TIP funds **MAY NOT** be used for indirect costs, building construction, remodeling or leasing facilities. Reimbursement will be processed in CTIMS according to the process mapping for all EDI. Appropriate documentation will be required for consideration. (See Reimbursement Checklist.)

The technology center is required to submit all the necessary documentation to receive reimbursement from ODCTE NO LATER THAN the quarter following expenditure or the end date of the training. Final quarter requests will not be accepted after July 31 following the end of the fiscal year.

Examples: A class ending July 31 in FQ1 will be eligible for reimbursement until Dec 31 in FQ2 (five months). A class ending September 30 in FQ1 will be eligible for reimbursement until Dec 31 in FQ2 (three months).

Any individual equipment purchases exceeding \$2,500 will be labeled and inventoried as State of Oklahoma Property and subject to all state rules and regulations and recallable for other training needs.

PARTIAL PROJECT REIMBURSEMENT REQUESTS: Partial payment requests will be accepted for longer-term projects for which official IMD PEFs are not submitted until project completion. These requests for payment can be submitted by attaching a local student accounting system data report. Such SAS data must include information equivalent to an IMD PEF. An IMD PEF will still be required upon final request for payment on a completed project.

When applicable, ODCTE will only reimburse for consumables utilized based on the number of students who completed training. The company or the technology center will bear the burden of consumable expenses for students who do not complete training under the TIP agreement.

Reimbursement for company-provided new employee orientation will be reimbursed at a maximum of \$100 per new employee

TRAINER REIMBURSEMENT RATES:

- Schools are encouraged to use their staff members for ~~safety~~ training when possible.
- Technology center staff will be reimbursed up to \$40.00/hr.
- Technology center adjuncts or third-party contract trainers will be reimbursed up to \$150 hour for specialized training. Any training request over \$150/hour (regardless of unit type) must be pre-approved with the Regional Coordinator and will require appropriate documentation to be uploaded with the agreement and supported in the comments.
- Payment for technology center ~~instructors~~-adjuncts and third party contract trainers will require an itemized invoice, contract, or other documentation (with rates and time) to be eligible for reimbursement.
- Safety training included in a TIP agreement is NOT to be reported as a Type 21.

TRAINING FOR INDUSTRY CREDENTIALS:

In the event training is being conducted for the purpose of industry certification, reimbursement may be provided based upon the greater of \$300 per student or the allowable instructor reimbursement rate for technology center instructor, adjunct instructor, or contract trainer. In order to qualify as training for industry certification, there must be an industry-recognized certification examination associated with student completion.

For On-line classes, please see Class Type 15.

Non-Reimbursed Classes– (Type 60, 61, 62, 75, 78)

These program types are used for many classes that are essential to the communities served by the technology center but do not meet the guidelines for state funding. These classes can be submitted as program type 60, 61, 62, 75, or 78.

60 – Informal Training (non-reimbursable): The designation for technical assistance using organizational development tools or processes (needs assessment, surveys, strategic planning). Includes phone consultation and preparation time, but it does not include professional development meetings, professional association meetings or marketing-related activities (cold calls, informal visits, public appearances, etc.). This training is not eligible for formula funding.

Technology centers are encouraged to have documentation on file that outlines the objectives, the service or product delivered and the individual(s) responsible for providing the product or service. **Type 60 must be reported with at least one student to indicate for whom the consulting was provided.**

61 – Community Services (non-reimbursable): The designation for classes conducted and/or coordinated by the technology centers that are typically not occupational in nature but meet the needs of the community interests. Examples are ACT workshops, soap making, hunter safety, staff development and yoga. Classes and activities reported under this program type are not eligible for formula funding.

Type 61 can be reported without submitting separate student data. Type 61 can be reported without submitting separate student data.

62 – Career Development Services (non-reimbursable): The designation for services provided to adults to assist them in achieving career development goals such as career advisement assessments, guidance and counseling services, testing and industry credential certification assessments (Health Certification Project, Office of Personnel Management, information technology certification). **Type 62 can be reported without submitting separate student data.**

75 – Facility Usage Only: The designation used to report classes, meetings or activities conducted at the technology centers in which the only involvement by the technology center is facilitating the usage of the building. (Red Cross blood drives, chamber of commerce meetings, Boy Scout meetings or any classes conducted by outside entities). Classes reported under this program type are not eligible for formula funding. **Type 75 can be reported without submitting separate student data.**

78 – Technology Center Collaboration Partnerships: The designation used to report training that is offered in cooperation with a partnering technology center. This code is **not** eligible for formula funding and **will not** be used in the cost report. **Type 78 must turn in at least one student. The class name must contain the contract number the other technology center is submitting (WORD (A1234)). Type 78 can be reported without submitting separate student data.**

Oklahoma Bid Assistance Network – (Type 79)

This program type is used for the marketing and technical assistance to Oklahoma businesses interested in selling products and services to federal, state and local governments and other highly structured markets.

The primary purpose of OBAN is to create jobs and expand the economy in Oklahoma by providing specific, valuable resources to Oklahoma businesses.

ORGANIZATION:

Participating technology centers deliver OBAN services at locations throughout Oklahoma. The Oklahoma Department of Career and Technology Education administers the program.

OBAN, which serves as a Procurement Technical Assistance Center, is funded in part through a cooperative agreement from the Department of Defense through a program that is administered by the Defense Logistics Agency. The content of any written materials or verbal communications of the PTAC does not necessarily reflect the official views of or imply endorsement by DOD or DLA.

FUNDING AND PERFORMANCE GUIDELINES FOR EXISTING BID ASSISTANCE CENTERS:

1. **Minimum performance standards.** For existing bid assistance centers to be entitled to full funding, they must meet established minimum performance standards.
2. **Previous performance.** Performance during the previous year will serve as the basis for determining current year funding.
3. **Program audits.** Each existing program will be subject to an audit by the department to determine eligibility for funding.
4. **Performance standards; evaluation.** Minimum performance standards shall include the number of clients served, counseling hours, outreach conducted and the quality of interaction maintained with clients as demonstrated by counseling session documentation.
5. **Funding.** Funding is based upon the minimum performance standards and will be administered by CareerTech OBAN staff.
6. **Funding agreement.** An approved funding agreement must be executed between each local school and the department prior to issuing the first quarterly payment for funding.
7. **Memorandum of Understanding.** Each technology center participating in the Oklahoma Bid Assistance Network must sign a memorandum of understanding with the OBAN program office. The MOU identifies performance standards, but also references federal laws and regulations governing the OBAN program.

These regulations place requirements on the program and on each of its participating technology centers. A sample MOU can be obtained by request from the OBAN office.

8. **OBAN Policy and Procedures Manual.** The manual spelling out OBAN's policies and procedures is maintained at the program office. A copy is given each OBAN coordinator at new hire orientation and upon request. A digital copy is available to current OBAN coordinators at all times.

Firefighting Training Initiative – (Type 83)

This program type is used to accommodate the increased demand placed on technology centers for training and testing of firefighters who are members of volunteer fire departments in Oklahoma. This training shall include firefighter training and associated testing as well as first responder training and associated testing.

JUSTIFICATION:

Oklahoma's economic future will largely depend on the ability of technology centers to provide training for members of volunteer fire departments. Frequently this requires providing existing firefighters with upgrade training or training on new systems or equipment. Technology centers have a mission to respond to these needs by designing customized industry training programs. The Firefighter Training Initiative funds will allow technology centers to establish more partnerships with members of volunteer fire departments.

METHOD FOR DISTRIBUTING FUNDS:

Technology centers will be reimbursed on a project-by-project basis for tuition-free training programs designed to meet specific needs of members of volunteer fire departments within their districts. Each technology center will have a specific amount of Firefighter Training Initiative funds.

ALLOCATION OF TECHNOLOGY CENTER FUNDS:

Each technology center will:

- Inform the volunteer fire departments of the Firefighter Training Initiative funds that are available;
- Assist members of volunteer fire departments to determine if training could enhance their abilities to serve their community.
- Submit a **fiscal year** budget and worksheet in CTIMS for each interested volunteer fire department.
- Submit a change request in CTIMS as soon as possible if conditions warrant release of funds for any approved project. (See Change Request Process Mapping for Economic Development Initiatives.)
- Submit a change request in CTIMS for any budget changes for a previously approved project.
- Submit an itemized, detailed invoice in CTIMS to request payment for direct costs associated with previously approved project.

ODCTE will:

- Approve each eligible application for specific direct costs prior to the project start date.
- Notify the technology center in CTIMS within five to seven business days when the application is approved.
- Process all claims for payment when submitted in CTIMS within 20 business days.

Upon approval, technology centers will be paid by ODCTE for **direct costs** in accordance with the approved applications.

ELIGIBILITY CRITERIA:

This initiative is intended to serve members of volunteer fire departments in order to enhance knowledge and skills of the members. Technology centers are encouraged to use these funds to develop new partnerships with volunteer fire departments.

Reimbursement will be available for the following types of Firefighter Training Initiative projects:

- (a) Basic and upgrade training for members of volunteer fire departments
- (b) Training in a common skill set for a group of volunteer fire departments

EXCLUSIONS

- (a) No equipment can be purchased under the FF initiative.

(b) No classroom supplies can be purchased under the FF initiative. (Example: pens, pencils, paper, white board markers, erasers etc.)

Technology centers are encouraged to analyze the training needs of volunteer fire departments within their communities and design training programs for those departments that have the greatest ability to benefit. Items that technology centers may budget include firefighter training and associated testing, as well as first responder training and associated testing.

Funds **cannot** be used for indirect costs, building construction, remodeling or leasing facilities. Technology centers will be encouraged to pool resources for larger projects.

PROJECT APPLICATION:

All Firefighter Training Initiative projects must be approved prior to the project start date. (See Approval Process Mapping for Economic Development Initiatives.)

MODIFICATIONS

All changes made to Firefighter Training Initiative projects must be approved prior to training.

REQUEST FOR PAYMENT AND REPORTING PROCESSES:

Each technology center will submit a copy of PEFs that have been up loaded into IMD. Each technology center will use the process described in “Instructions for Providing Secondary and Adult Program Enrollment Data.”

Reimbursement for costs will be processed upon receipt of invoice. Requests for payment may be submitted as expenses are incurred.

The technology center is required to submit all necessary documents to receive reimbursement from the ODCTE not later than the quarter following the expenditure. Final quarter requests will not be accepted after July 31 following the end of the fiscal year.

Examples: A class ending July 31 in FQ1 will be eligible for reimbursement until Dec. 31 in FQ2 (five months). A class ending Sept. 30 in FQ1 will be eligible for reimbursement until Dec. 31 in FQ2 (three months).

PARTIAL PROJECT REIMBURSEMENT REQUESTS: Partial payment requests will be accepted for longer-term projects where official IMD PEFs are not submitted until project completion. These requests for payment can be submitted by attaching a local student accounting system data report. Such SAS data must include information equivalent to an IMD PEF. An IMD PEF will still be required upon final request for payment on a completed project.

TECHNOLOGY CENTER STAFF:

If a technology center staff member is used as an instructor, the reimbursement rate will continue to be \$40 per hour (the \$40 includes FICA). Firefighter Training Initiative funds are intended to supplement, not replace, the business and industry services budget at each technology center. Tuition will not be charged for Firefighter Training Initiative projects. Firefighter Training Initiative enrollment should be submitted as a Type 83.

Safety Training Grants – (Type 90)

The Oklahoma Department of Career and Technology Education provides funds (if available) to assist in offsetting some of the costs related to purchasing new equipment, upgrading equipment, and instructional libraries and/or instructor training.

Safety training grants shall be applied for in CTIMS and will be considered for approval on a project by project basis.

Projects may be applied for in CTIMS and will be considered for approval on a project-by-project basis. All qualifying projects must be approved through the BIS Director role. Safety training grants will not exceed \$2,000 for each project. Safety training grant funds cannot be used for indirect costs, building construction, remodeling or leasing facilities.

Innovation Training Grants – (Type 91)

The Oklahoma Department of Career and Technology Education provides funds (if available) to assist in offsetting some of the costs related to purchasing new equipment, upgrading equipment, instructional libraries and/or instructor training.

Innovation training grants shall be applied for in CTIMS and will be considered for approval on a project by project basis. Innovation training grants should be developed by defining a strategic opportunity within a district, gathering trends and market insights, observing and gathering customer needs, and testing new concepts with pilot customers. Innovation training grants will be considered based upon the following criteria:

- **Marketability:** Potential for growth both in and out of district;
- **Originality:** Innovativeness, demonstrated creativity and originality of the training offering;
- **Scalability:** Potential for state-wide implementation (if applicable);
- **Economic impact:** The economic impacts of the proposed training, and how it addresses existing challenges faced by a community/county/district or business and industry as a whole;
- **Technical aspects:** The technological significance of the innovation in the particular field and beyond.
- **Cost Effectiveness:** Efforts made to keep costs per successful student at a minimum.

Projects may be applied for in CTIMS and will be considered for approval on a project-by-project basis. Training items must meet specific needs of local industry within the technology center district to be eligible. All qualifying projects must be approved through the BIS Director role.

Innovation training grants will not exceed \$2000 for each project. Additional supplemental funds may be available for grant requests on a project by project basis that may exceed \$2000.

Innovation training grant funds cannot be used for indirect costs, building construction, remodeling or leasing facilities. Any equipment purchases become property of the technology center.

Incubators – (Type 68)

The Oklahoma Department of Career and Technology Education provides funds (if available) to assist in offsetting some of the incubator costs related to purchasing new training-related equipment, upgrading training-related equipment, and client training.

Projects shall be applied for in CTIMS and will be considered for approval on a project-by-project basis. Requests must meet specific needs for the local incubator and its clients to be eligible. All qualifying projects must be approved through the BIS director role. Any equipment purchases become property of the technology center. Each technology center is eligible for up to \$1,000.00 in incubator funds.

Incubator funds cannot be used for indirect costs, building construction, remodeling or leasing facilities.

All consulting hours are to be reported as Type 68. All training enrollments that meet the outlined criteria may be reported as Type 31.

OTHER REPORTING CODES

Agriculture Business Management (Type 28)

Agriculture Business Management Clients (Type 73)

See BIS Enrollments Technical Guidebook for reporting:

<https://www.okcareertech.org/about/state-agency/divisions/imd/ctims/EDICompleteProcess.pdf>

Using the CareerTech Information System (CTIMS)

A very detailed Technical Guidebook is available to assist with processing EDI agreements in CTIMS. It is located on the CTIMS home page at the following link under the EDI heading:

<https://www.okcareertech.org/about/state-agency/divisions/imd/ctims>

Note: A direct link to the CTIMS home page can be found on the top banner of the CareerTech home page

Beginning in FY18, the BIS Guidelines will be posted on this page under the same heading. This provides a “one stop” page for all the needed resources to process agreements.

First three things to remember when using CTIMS:

1. Open in Internet Explorer
2. Check to be sure you are in the correct role (top right hand corner)
3. Check to be sure you are in the current FY

Reimbursement Checklist

1. All documentation must be submitted through CTIMS in *.pdf format.
2. Include the following on all company invoices. Be sure the invoices are clearly legible.
 - a) Invoice number
 - b) Invoice date (Do not use order date, ship date, receive date, or date of first class)
 - c) Itemized description with amounts
 - d) Approval signature
3. Tie all invoices to a corresponding budget line item in the budget agreement in CTIMS.
4. A serial number on each piece of equipment exceeding \$500 for IT and \$2,500 for all other equipment is required on invoices for training equipment where required in the guidelines.
5. Travel reimbursement will be made according to these state guidelines. Zero balance receipts are required for travel reimbursement.
 - a) Mileage at state or federal rate (gsa.gov) is allowed.
 - b) Airfare: coach only and 21-day minimum advance purchase is allowed – see page 3.
 - c) Lodging at state or federal government rate (gsa.gov) is allowed.
 - d) Per diem is not allowed.
 - e) Rental car is not allowed.
6. When the vendor invoice does not contain sufficient accurate detail to describe what was purchased, additional supporting documentation may be required prior to payment being approved.
7. Required documentation for instruction costs:
 - a) Technology Center Staff/Contract Employees: Itemize the hourly rate of pay
 - b) Instruction Provider Contracts: Include a copy of the contract.
 - c) Vendor Contracts or Invoices: Include a copy of the contract or invoice.
8. The start date of the class must match the start date on the program enrollment form.

Summary of Revisions

Changes Made Effective July 1, 2018

INVOICING FOR PROJECT FUNDING PAYMENTS (TIP, TIG, Firefighter, etc.) (pg. 2)

Reimbursement for incurred costs included in the approved agreement budget will be processed in CTIMS. See page 18 for CTIMS information.

Technology centers are required to submit all necessary documents to receive reimbursement from ODCTE no later than the end of the quarter following the expenditure. Final quarter requests **will not be accepted after August 15 following the end of the fiscal year.**

Training Dates	Invoicing Due By
July 1 – September 30	December 31
October 1 – December 31	March 31
January 1 – March 31	June 30
April 1 – June 30	August 15

*First quarter ends on Sept. 30.
Second quarter ends on Dec. 31
Third quarter ends on March 31.
Fourth quarter ends on June 30.*

REPORTING ENROLLMENTS: (pg. 3)

Quarterly reports are due on the 15th after the end of the quarter. Below are important dates to remember in the reporting process:

- First quarter due October 15.
- Second quarter due January 15.
- Third quarter due April 15.
- Fourth quarter due July 15
- Data is final on August 15 following end of the fiscal year

TRAVEL REIMBURSEMENT (pg. 3)

When travel is approved as a budgeted item in an initiative agreement, reimbursement will be made according to these state guidelines:

Allowable:

- a) Mileage at state or federal rate (gsa.gov).
- b) Lodging at state or federal government rate (gsa.gov).
- c) **Travel reimbursement is limited to no more than 5% of the total training agreement.**
- d) Airfare requires a 21-day minimum advance purchase in coach class. Reimbursement will be based on the lesser of an agreed upon standard round-trip fare or the actual cost. Example: If the agreed upon round-trip fare is \$300 and the actual cost is \$1,200.00, the company will be reimbursed \$300.00. If the actual cost of airfare is \$250.00, the company is reimbursed \$250.00.

Not allowable:

- a) Per Diem is not an allowable expense.
- b) Fees for luggage check is not an allowable expense.
- c) Rental car/taxi/Uber, etc. fees are not allowable expenses.

TYPE 15 - Adult and Career Development (pg. 4)

Note: beginning in FY19, report all personal interest classes as a non-reimbursable type code listed on pages 12-13.

TYPE 21 – Safety for Government Entities or Industry (pg. 5)

This program type is used for safety training intended to help private or public organizations plan and implement safety processes and providing ongoing training to assure safe work environments for Oklahomans. This is done by providing quality preventative safety training. The following ~~Reactive~~ training does not qualify: First Aid, CPR, and Train the Trainer.

To be eligible for reimbursable safety training, the training must be conducted by a technology center instructor (full-time, adjunct, contract). Company employees do not qualify for reimbursement. ~~Online safety courses or safety courses conducted solely by video are not eligible for reimbursement.~~

On-Line classes should have (OLT) after the class name (Example: Ladder Safety (OLT)). These are self-paced or instructor-facilitated classes that are considered a complete instructional unit delivered over the Internet or via the computer to students primarily located at distance learning locations. In reporting On-Line Training, use the number of completion hours established by the class developer as the number of clock hours, and report all students who completed the training.

Type 42 - Training for Industry Growth – (pg. 9)

EQUIPMENT PURCHASES

~~Any individual equipment purchases exceeding \$2,500 will be labeled and inventoried as State of Oklahoma Property and subject to all state rules and regulations and recallable for other training needs.~~

Equipment purchases up to \$2,400.00 are allowed and will be approved on a project-by-project basis. All equipment purchased will become part of the technology center inventory.

TYPE 52 – Training for Industry Programs (pg. 9)

METHOD FOR DISTRIBUTING FUNDS:

Based on the availability of funds, TIP projects will be funded based on ~~an agreement of the company's training needs, the technology center and the state RC's.~~ a scoring process utilizing the Return on Investment (ROI) calculator to generate a score. Those proposals with the highest ROI will have priority in funding. A cut score could keep a TIP from being eligible for funding. Once funds are designated for specific TIP project, the following timeline must be followed:

1. Upon allocation of TIP funds to a technology center, an agreement must be initiated in CTIMS, by the Industrial Coordinator or designee, within fifteen (15) business days.
2. Training must begin within sixty (60) calendar days of the purchase order being entered into CTIMS. If training does not start, the technology center will receive a thirty-day (30) notice that the contract will be terminated. Status of training will be verified by the Regional Coordinator through active invoicing, current program enrollment forms (PEFs), or dated sign-in sheets/rosters.
3. If training cannot be verified within sixty (60) calendar days, the agreement will be terminated.

Note: additional wording will be added to the SOU to support this process: The Oklahoma Department of Career and Technology Education may terminate the contractual agreement for non-performance or other just cause upon a 30-day written notification to the technology center.

Travel that is approved as part of a TIP agreement cannot exceed 5% of the total training agreement – excluding consumables.

PARTIAL PROJECT REIMBURSEMENT REQUESTS (pg. 12)

Partial payment requests will be accepted for longer-term projects for which official IMD PEFs are not submitted until project completion. These requests for payment can be submitted by attaching a local student accounting system data report. Such SAS data must include information equivalent to an IMD PEF. An IMD PEF will still be required upon final request for payment on a completed project.

TRAINER REIMBURSEMENT RATES (pg. 12)

Payment for technology center ~~instructors~~-adjuncts and third party contract trainers will require an itemized

TYPE 68 – Incubators (pg. 16)

Incubator agreements cannot exceed \$1,000 per technology center. All training enrollments that meet the outlined criteria may be reported as Type 31.

OTHER REPORTING CODES

Agriculture Business Management (Type 28)

Agriculture Business Management Clients (Type 73)

See BIS Enrollments Technical Guidebook for reporting:

<https://www.okcareertech.org/about/state-agency/divisions/imd/ctims/EDICompleteProcess.pdf>

Changes Made Effective July 1, 2017

These are currently in purple text – after August 15 all text will be changed to black.

TYPE 52 – TIP

- Technology center staff will be reimbursed up to \$40.00/hr. (regardless of unit type)
- Technology center adjuncts or third-party contract trainers will be reimbursed up to \$150 hour for specialized training. Any training request over \$150/hour (regardless of unit type) must be pre-approved with the Regional Coordinator and will require appropriate documentation to be uploaded with the agreement and supported in the comments

TYPE 42 AND 52

Statements of Understanding/Purchase Orders

1. Generate a statement of understanding (SOU) between ODCTE and the technology center in CTIMS to define specifically what was agreed upon.
2. After SOU is acknowledged and approved in CTIMS by the appropriate technology center and ODCTE staff, a purchase order will be assigned by the ODCTE Finance Division. Training cannot begin until the agreement has been assigned a purchase order number.
3. Any individual equipment purchases exceeding \$2,500 will be labeled and inventoried as State of Oklahoma Property and subject to all state rules and regulations and recallable for other training needs.

EQUIPMENT PURCHASES

Any individual equipment purchases exceeding \$2,500 will be labeled and inventoried as State of Oklahoma Property and subject to all state rules and regulations and subject to recall for other training needs.

TYPE 68 – INCUBATOR

Removed the “coordinator training” language as it conflicts with the front of the guidelines where professional development for technology center staff is listed as an ineligible activity.

GENERAL INFORMATION

Curriculum development will be reimbursed up to 2% of the total training request, not including consumables, supplies, books, etc.

PAYMENT PROCESS

1. At the beginning of each fiscal year and based on available funds, the agency provides each tech center with their fiscal year allocation.
2. The customized and safety training line item will be paid to the school in 12 equal monthly payments at the same time operations payments are made. Payments will no longer be based on eligible contact hours generated during the current year, but rather the total allocated amount, based on the BIS funding formula, for the current fiscal year.

REPORTING ON-LINE ENROLLMENTS FOR TYPE 31,42, AND 52

In the event an on-line class was conducted in a program type 31, 42, or 52, please report enrollments quarterly for those students who completed the training for the quarter being reported. (Removed grouped reporting requirements.)

Changes Made Effective July 1, 2015

1. Moved Acronyms Defined sheet to upfront pages.
2. Updated Table of Contents.
3. Removed fiscal year on the cover. Updated effective date.
4. Changed BIS agent to RC in General Information section, paragraph one.
5. Updated FY15 to FY16 in General Information funding section
6. Added language to Safety for Government Entities or Safety for Industry Type 21.
7. Removed last sentence in TIG Type 42, Eligibility Section.
8. Updated language describing reimbursement rate to include FICA in TIG, Type 42.
9. Changed wording for reimbursement rate in TIG Type 42, Technology Center Staff section.
10. Rephrased language and replaced with more concise wording in TIP Type 52, paragraph one.
11. Updated language and corrected punctuation in Eligibility Criteria under TIP Type 52.
12. Updated Language in TIP Type 52, Process Section.
13. Edited and updated examples under Reimbursement and Trainer Reimbursement Rates in TIP Type 52.
14. Added language to reflect FY17 Administrative Fee funding change.
15. Updated Firefighter Training Type 83, added/removed language, included minor editing.
16. Removed language from heading for Safety Training Grants Type TBD, updated and added language, paragraphs one through five.
17. Minor editing Innovation Training Grants Type 91.
18. Updated FY on Funding Worksheet in Appendices.
19. Updated Approval Process Mapping in Appendices.
20. Updated Change Request Process Mapping in Appendices.
21. Some minor editing and formatting to the document without adding, deleting, or modifying any intent of the guidelines.

Changes Made Effective July 1, 2014

1. Removed fiscal year in graphic on the cover. Updated effective date.
2. Removed Training for Existing Industry, Nurse Aide, Agricultural Business Management, and WorkKeys Job Profiles, and changed Business and Entrepreneurial Services to Client-Based Consulting Services on the program listing.
3. Removed Training for Existing Industry, Nurse Aide, Agricultural Business Management, and WorkKeys Job Profiles, changed Business and Entrepreneurial Services to Client-Based Consulting Service, removed Business and Entrepreneurial Services and CNA supporting documents from the Appendices, updated contact information, and renumbered contents on the Table of Contents.
4. In the General Information section, updated language in paragraphs 1., 2., and 3, and removed paragraph 4 in Funding Definitions. Renamed Type 60 as Formal Training and included some minor editing and formatting updates.

5. Updated Type 18 or 53 to Type 21 for FY15 as previously announced in FY13 and included some minor editing and formatting updates.
6. Removed Health—Certified Nurse Aide section
7. Removed Training for Existing Industry section.
8. Removed Agricultural Business Management section.
9. Revised language in Customized Industry Training or Government Entity Training. Updated Type 16 or 17 to Type 31 for FY15 as previously announce in FY13 and included minor editing, and formatting updates.
10. Removed Business and Entrepreneurial Services section. Added Client-based Consulting Services section. Moved Enrollment Reporting section to General Information on Page 2.
11. Updated Employee Assessment and Retraining Network section. Removed GED training and Language training (ESL ort foreign language) from the Eligibility Criteria.
12. Updated Training for Industry Growth section. Updated Targeted Industry Sectors, added language, and included minor editing and formatting updates.
13. Redefined Type 60 to be Informal training only. Refer to Client-Based Consulting section and include consulting provided for clients n Type 32 reporting.
14. Removed Agricultural Business Management (Client Data) section.
15. Updated Safety and Innovation Training Grants section.
16. Updated Incubators section. Established that training provided for clients is to be included in Type 31 reporting and consulting provided for clients is to be included in Type 32 reporting.
17. Removed WorkKeys Job Profiles section. Added WorkKeys information to the TIP section.
18. Added FY15 Funding Worksheet in the Appendices.
19. Updated Acronyms Defined listing in the Appendices.
20. Removed Business and Entrepreneurial Service Programs Reporting Information from the Appendices.
21. Removed CNA documents from the Appendices.

Changes Made Effective January 1, 2014

1. Program Listing and Table of Contents updated.
2. Removed language on Page 5 pertaining to non-reimbursed safety classes.
3. Updated language for CNA I, II, III
4. Modified language for the General Trainer Reimbursement Rates in TEI and TIP.

5. Added new guideline to provide reimbursement process for Training for Industry Credential in TEI, TIG, and TIP.
6. Limit reimbursement for company-provided new employee orientation to a maximum of \$100 per new employee.
7. Added new section for Safety and Innovation Training Grants.
8. Added section for WorkKeys Job Profiles.
9. Added section for Incubators.
10. Added CNA I documents in Appendices.
11. Some minor editing and formatting to the document without adding, deleting, or modifying any intent of the guidelines.

Changes Made Effective July 1, 2013

1. In previous fiscal years, the Economic Development Initiative guidelines were included in “Instructions for Providing Enrollments and Business and Industry Services Class Data,” published by the Information Management Division. Beginning in FY14, the EDI guidelines will be published as a separate document and made available by the BIS staff. A PDF electronic copy will be linked on IMPACT and to the Business and Industry Services Web page. Printed copies may be made on demand locally.
2. Added graphics of process mapping.
3. Several program type codes have been revised. The following program type codes will be used in FY14:

<u>FY13</u>	<u>FY14</u>
01	01—Apprenticeship
15	15—Adult and Career Development
18, 53	21—Safety for Government Entities or Safety for Industry
24	24—Health—Certified Nurse Aide I, II, III
28	28—Agricultural Business Management
30	30—Training for Existing Industry
16, 17	31—Customized Industry Training or Government Entity Training
26, 27	32—Business and Entrepreneurial Services
35	35—Employee Assessment and Retraining Network
42	42—Training for Industry Growth
44	44—Truck Driver Training
52	52—Training for Industry Program
64	64—Tinker Training/Mid Del Technology Center Training
60	60—Non-Reimbursed Classes--Consulting/Informal Training
61	61—Non-Reimbursed Classes—Community Services
62	62—Non-Reimbursed Classes—Career Services
75	75—Non-Reimbursed Classes—Facility Usage Only
78	78—Non-Reimbursed Classes—Technology Center Collaboration Partnerships
73	73—Agricultural Business Management (Client Data)
83	83—Firefighting Training Initiative
84	84—Oklahoma Bid Assistance Network

Type 16 and 17 will remain active through FY14 for local technology center use, but ODCTE reports will be consolidated as Type 31. In FY15, Type 16 and Type 17 will be retired, and Type 31 will be used for reporting for Customized Industry Training or Government Entity Training.

Type 18 and 53 will remain active through FY14 for local technology center use, but ODCTE reports will be consolidated as Type 21. In FY15, Type 18 and Type 53 will be retired, and Type 21 will be used for reporting for Safety for Industry or Safety for Government Entities.

4. Expanded the General Guidelines Statements to include funding definitions and guidelines for travel reimbursement, lab preparation time and Impact Follow-up Interview and Data Collection. The General Guideline Statements also will identify targeted industries within ecosystems. These guidelines are applicable to all Economic Development Initiatives training agreements with TEI, TIG and TIP clients.
5. Updated Adult and Career Development guidelines.
6. A match will not be required for special funds.
7. Modified Eligibility Criteria for Training for Existing Industry
8. Modified type of projects that may be reimbursed for Existing Industry.
9. Updated Business and Entrepreneurial Services guidelines.
10. Added documents in the appendices and completed a significant amount of editing and formatting to the document without adding, deleting or modifying any intent of the guidelines.
11. Updated Adult and Career Development guidelines.
12. A match will not be required for special funds.
13. Modified Eligibility Criteria for Training for Existing Industry
14. Modified type of projects that may be reimbursed for Existing Industry.
15. Updated Business and Entrepreneurial Services guidelines.
16. Added documents in the appendices and completed a significant amount of editing and formatting to the document without adding, deleting or modifying any intent of the guidelines.