

**PLANNING, POLICY AND GOVERNMENTAL AFFAIRS
AUGUST 29, 2019**

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PLANNING, POLICY AND GOVERNMENTAL AFFAIRS
AUGUST 28, 2019

IDAHO STATE UNIVERSITY (ISU)

SUBJECT

Idaho State University – Annual Progress Report

APPLICABLE STATUTE, RULE, OR POLICY

Idaho State Board of Education Governing Policies & Procedures, Section I.M.3.

ALIGNMENT WITH STRATEGIC PLAN

GOAL 1: Educational System Alignment. Objective B: Alignment and Coordination.
GOAL 3: Educational Attainment. Objective A: Higher Level of Educational Attainment. Objective B: Timely Degree Completion. Objective C: Access.

BACKGROUND/DISCUSSION

This agenda item fulfills the Board's requirement for Idaho State University to provide a progress report on the institution's strategic plan, details of implementation, status of goals and objectives and information on other points of interest in accordance with a schedule and format established by the Board's Executive Director.

IMPACT

Amendments to Idaho State University's strategic plan adopted a focus on goals providing a path towards addressing Idaho State University's largest challenges while allowing for a transition in presidential leadership. This plan has served as the basis for short-term operational plans. In fall 2019, the University will launch a strategic planning effort that will result in a 15-year visionary plan.

ATTACHMENTS

Attachment 1 – ISU Annual Report

STAFF COMMENTS AND RECOMMENDATIONS

Idaho State University's annual report gives the Board the opportunity to discuss the institution's progress toward meeting strategic goals, initiatives the institution may be implementing to meet those goals, and progress toward the Board's student completion initiatives.

BOARD ACTION

This item is for informational purposes only.



Idaho State
University

Progress Report

JULY 2019

ROAR

Institutional Overview

Degree Offerings

Idaho State University has 281 degree programs, providing our students with the largest depth and breadth of programs in the state. ISU serves region V for career-and-technical education, regions IV, V, and VI for undergraduate and graduate education, as well as a statewide mission in the health sciences. This poses unique opportunities for regions with the lowest go-on rates in Idaho. ISU has positioned itself as the regional comprehensive University offering a broad array of degrees for those students that are looking for an in-state quality education with a variety of choices. At the same time, the University must also manage creating a unified culture and presence across this broad spectrum.

College	Arts and Letters	Technology	Health Sciences	Business	Science and Engineering	Education
Certificate	2	33	5	2	2	0
Associate	3	29	4	1	2	0
Baccalaureate	30	7	12	13	22	29
Masters	13	0	14	5	16	15
Doctoral	4	0	8	0	8	2
Total	52	69	43	21	50	46

Multi-Campus Dynamic

Idaho State University provides robust outreach program offerings across Idaho. These outreach centers are unique in their function, purpose, opportunities and challenges, seeking to meet both regional and statewide program needs.

The Meridian campus provides more than 30 program offerings in the health sciences, and support for numerous online programs. Through a public-private partnership, the Meridian campus houses Idaho's first medical school, supporting increased interprofessional education opportunities for students and faculty. There is tremendous potential for growth to meet the health care workforce needs in the Treasure Valley and throughout Idaho. The greatest limitation to expansion is the start-up costs associated with starting new programs, as well as the space and infrastructure requirements associated with expanding current programs. However, Idaho State's recent acquisition of two parcels of property in Meridian lay the foundation for long-term growth.

The Idaho Falls campus provides more than 35 program offerings in humanities, science, business, education, and health sciences, and support for numerous online programs. Its location, housed with the University of Idaho and near the Center for Advanced Energy Studies, and the Idaho National Laboratory, creates significant opportunities. However, enrollments have declined significantly for the last nine years. Currently, a number of degrees are partially offered on the Idaho Falls campus, but require some travel to Pocatello, which has been identified as a barrier to sustained enrollment. The University has increased focus on creating Idaho Falls-specific paths to graduation, as well as creating a seamless pipeline for students coming from the College of Eastern Idaho. The University is also focusing considerable efforts towards the establishment of the Polytechnic Initiative. Through this initiative, the University plans to build more science and engineering programs in Idaho Falls that take a multidisciplinary approach to meeting workforce needs.

The Twin Falls outreach center provides more than 10 programs, primarily in education and psychology, supports several online programs, and is located on the College of Southern Idaho's campus. Idaho State is currently in the process of establishing a multi-year strategy to expand teacher education and baccalaureate nursing. The primary challenge associated with expansion in Twin Falls is that enrollment potential in these programs do not provide adequate revenue to fund faculty or student support services, requiring reallocated resources from other campuses, with an overall net decrease to institutional resources.

	Degrees Offered	Enrolled Students	% Change in Enrollment Over 5 Years
Meridian	40*	716	+1%
Idaho Falls	46*	1,057	-39%
Twin Falls	12*	47	-70%
Pocatello	281	8,993	-18%
High School	Early College Program	3,036	+43%

*includes online program offerings

Mission Focus

Idaho State University is also unique in its identity. While being the leader in the health sciences, Idaho State also provides robust career technical education, in addition to traditional science and liberal arts undergraduate and graduate education. This effectively creates three different higher education operations (specialized health science education, career and technical education, and a regional comprehensive university) all operating together. In fact, ISU is one of only five other institutions in the country with the depth and breadth of mission, and the only one east of the Mississippi. This dynamic provides a very interesting challenge in trying to market one university with one identity. Further, there are challenges in attracting and retaining faculty for these three distinct mission foci. The University is required to have the policies and practices necessary to meet the needs of technical, clinical, research and health professional faculty (who often serve in a joint appointment with a health care provider), in addition to tenure and non-tenure track faculty. The space and facilities needs for this breadth also pose challenges unique to Idaho State University, as three examples illustrate. Idaho State University maintains a working nuclear reactor on campus, two cadaver labs (in Pocatello and Meridian), and machining space for the mechanical arts. Each of these facilities have high cost of construction, operations, and maintenance and yet each are critical to the delivery of our mission.

Retention Challenges

One of Idaho State University's greatest challenges is retention. The data below provides an overview of retention rates for each class to demonstrate the stopping point for many ISU students. Presently, the University has not conducted comprehensive exit surveys, so there is not concrete information to make informed decisions about why students are not completing, or if they enroll in another institution after they leave. This will change beginning Fall 2019, as a "leaver survey" has been created and will be utilized moving forward. Qualitatively, there are several indicators that explain our low year-to-year retention rates. Among these are optional attendance and participation in new student orientation, optional academic advising, challenges with tutoring offerings, lack of peer mentoring, inadequate supplemental instruction, substandard university housing, and few opportunities for student involvement in co-curricular activities.

Idaho State University Key Data	FY2015	FY2016	FY2017	FY2018	FY2019
Retention Rate: fall-to-fall, full-time, first-time bachelor degree seeking student FYs 18-22	73%	72%	69%	65%	Available October 2019
Freshman to Sophomore (all degree-seeking - fall-to-fall retention)	66%	62%	58%	55%	Available October 2019
Sophomore to Junior (all degree-seeking - fall-to-fall retention)	75%	72%	75%	77%	Available October 2019
Junior to Senior (all degree-seeking - fall-to-fall retention)	85%	84%	86%	87%	Available October 2019
Graduation Rate: percent of full-time, first time students from the cohort of new first-year students who complete their program within 1½ times the normal program length	33%	32%	29%	30%	Available late August 2019

Enrollment

For many years the University has experienced enrollment declines. These declines have been largely attributed to the retention issues and the decline in international students. However, ISU's recruitment efforts are starting to see positive indicators, with the number of Idaho resident, new first-time freshmen increasing. The University believes that addressing the retention issue will have the greatest impact on overall enrollment. However, the University is still implementing a number of initiatives aimed at increasing enrollment including changes to recruiting events, increased outreach to high schools, and an increased effort to leverage dual-credit.

Idaho State University Key Data	FY2015	FY2016	FY2017	FY2018	FY2019
Total Annual Enrollment Full-Time Equivalency (FTE) ¹	10,808	10,589	10,233	9,960	9,775
- Career Technical	810	788	771	747	828
- Undergraduate	7,861	7,759	7,378	7,108	6,864
- Graduate	2,137	2,042	2,084	2,105	2,083
Total Idaho resident new degree-seeking undergraduate students ²	1,630	1,562	1,500	1,643	1,681
¹ Annual full-time equivalency (FTE) is calculated by dividing the total Undergraduate and Professional Technical credit hours (SCH) by 30; total Graduate SCH is divided by 24. ² New students in the summer semester enrolled in the subsequent fall semester are counted as "new" in the fall semester.					

Financial Hardship

Idaho State University is also unique given the percentage of students that are Pell Eligible, indicating some amount of financial hardship. Pell eligibility is determined by a federally determined formula. The major factors are a student and their family's 1040 Adjusted Gross Income, actual federal taxes paid, household size, number of household members attending college, and marital status. At ISU, nearly half of the student body is Pell eligible. The University has to begin to address how retention efforts can be aimed toward students facing financial insecurity.

Idaho State University Key Data	FY2015	FY2016	FY2017	FY2018	FY2019
Percentage of Pell eligible	45%	42%	41%	43%	43%

College Readiness

In addition to the financial challenges faced by ISU students, a large percentage of students entering the University bring academic challenges as well. To be admitted to the University, students must have a 2.5 or better cumulative unweighted high school GPA, and test scores that meet the following: redesigned SAT total score of at least 1030, or math score of at least 18 on ACT or 520 on the redesigned SAT math section, and English score of at least 18 on ACT or 25 on the redesigned SAT reading test. For fiscal year 2019, approximately 35% of ISU students do not meet these requirements and are potentially under-prepared to perform at a collegiate level.

Idaho State University Key Data	FY2015	FY2016	FY2017	FY2018	FY2019
Percentage of first-time undergraduate degree-seeking students that are conditionally admitted to ISU	41%	43%	42%	40%	35%

Institutional Overview Summary

Idaho State University's path forward should account for its unique institutional make-up, positioning and challenges. With a significant amount of students conditionally admitted with a high degree of financial need, the student body of Idaho State University has increased need for support both from a variety of student services functions. The University's retention and graduation rates likely reflect these unique challenges, while also pointing to a number of student support and infrastructure investments that are needed. Finally, Idaho State's program spread and multi-campus dynamic, position the University to be a comprehensive University of choice, but the University must also manage the challenges that this expanse of scope present.

Strategic Plan Implementation

Idaho State University's strategic plan was adopted in 2018 with the goal of providing a path towards addressing Idaho State University's largest challenges while allowing for a transition in presidential leadership. This plan has served as the basis for short-term operational plans. In fall 2019, the University will launch a strategic planning effort that will result in a 15-year visionary plan.

During the 2018-2019 academic year, the University substantially increased its focus on addressing student enrollment and supporting student success, creating a thriving workforce culture, and reinforcing community partnerships.

Below are a number of strategic initiatives have been implemented in the last year to support the strategic plan.

Goal 1: Grow Enrollment

- Realigning ISU's Enrollment Management Unit: To support increasing enrollment and student success, Enrollment Management moved from Academic Affairs to Student Affairs in March 2019. The new alignment provides important synergies among services and units, so students can receive more streamlined help on a variety of matters such as enrollment, housing, financial aid, advising, and other student-support activities.

Goal 2: Strengthen Retention

- Planning and implementing Momentum Pathways: The University has developed a comprehensive project management plan for the implementation of Momentum Pathways, a game-changing methodology focused on boosting college attainment through evidence-based strategies to help students meet key, first-year benchmarks. The project-planning framework consists of a steering committee and three project groups with representatives from across the institution. Each project group is focused on developing specific implementation and dissemination recommendations for two of the Momentum Pathways strategies. The project groups have been meeting regularly throughout the summer and will submit final recommendations to the steering committee and senior leadership on September 16, 2019.

Goal 3: Promote ISU's Identity

- The Office of Marketing and Communications has led the effort to launch a statewide marketing and brand-image campaign. ISU began by assessing Idahoans' perceptions about ISU using a statewide survey. Using that information, the University then developed a statewide marketing campaign to educate Idaho's citizenry about Idaho State. The marketing effort not only supports recruiting students to ISU, but it is also designed to energize ISU's community relationships and build recognition.

Goal 4: Strengthen Communication, Transparency, and Inclusion

- In fall 2018, ISU's Faculty Senate worked closely with University administration to write a new Faculty Senate Constitution, and by December it received SBOE approval. The Constitution represents Administration and Faculty Senate's commitment to shared governance. It is a significant step toward building trust between the faculty and administration, which is the foundation of the strategic goal. Additional efforts have been implemented to increase internal communication and feedback including, leadership listening sessions, campus newsletters about organizational change, and new council structures that facilitate joint decision-making.

Goal 5: Enhance Community Partnerships

- ISU's Internship Programs: The University is closely coordinating with community businesses, industry leaders, and government agencies at all levels throughout southern Idaho to identify opportunities for students to participate in degree-related internship positions. Many times, organizations see this as an opportunity to train their future workforce, and internships can lead to full-time positions for the students.
- The University has become an active partner in regional coordination efforts such as hosting quarterly meetings of the city councils, mayors, school superintendent and county

commissioners. The University has also joined the regional economic development organization REDI and begun active outreach with high schools to build relationships.

- Carnegie Community Engagement Classification- In April 2019, ISU submitted its application to be recognized by the Carnegie Foundation for its commitment to community engagement. This was the first time ISU has applied for the voluntary classification, which required the University to complete a comprehensive, evidence-based self-assessment focused on ISU's direct impact of its engagement practices within the Pocatello community and other communities statewide.

Initiatives Moving Forward

The following are strategies and initiatives that Idaho State University will focus on in the coming year, and their alignment with the current strategic plan.

Recruitment and Retention: Goal 1 and 2 of Idaho State University Strategic Plan

Promote ISU and create an environment that attracts and retains students, while identifying and addressing barriers to retention.

Academic Success and Retention Task Force

- In fall 2018, the University launched the Academic Success and Retention Task Force. The objective of this group is to assess the current data on the Idaho State University-specific retention and student success factors to identify why students are not completing. With this data, the University will begin to develop programs, initiatives and process improvements to address the factors leading to non-completion. From these efforts, the University has begun efforts to make program improvements in the areas of recruitment, academic advising, orientation and new student programs, and the first academic year experience.

Momentum Pathways Implementation

- While the Academic Success and Retention Task Force is focused on identifying the ISU-specific elements that are contributing to or hindering student success and retention, a representative group of campus constituents has been diligently working to implement the proven Momentum Pathways. Significant progress has been made in implementing these six strategies over the last several months. Academic Maps for the 2020-2021 academic year are being developed for all academic programs; they will be completed by mid-October. Momentum Year requisites are being included in each Academic Map and supported through academic advising. Corequisite math courses have been developed for each gateway math course and are nearing full capacity for fall semester. Math Pathways have been defined for approximately half of all academic programs, and those programs without clearly defined Math Pathways will do so by October 15. A "Think 30" campaign was introduced at the spring 2019 "Early Registration" event for all incoming students, and the campaign will continue to expand over the coming academic year.

Recruitment Efforts

- The University is also in the process of reviewing and updating recruiting efforts, events and programs to ensure that students are aware of the opportunities available at Idaho State University. This will include significant changes to the format and number of recruiting events held, how the University works with high schools in the region, and how dual credit is leveraged to channel students to higher education.

Tuition Lock Program

- For the last three years, the University has been implementing the state's only tuition-lock program with the goal of recruiting students, keeping students on a steady path towards

graduation, and to alleviate as many financial barriers as possible. Currently, this program is not significantly promoted, nor are most students meeting the requirement to take 15 credits per semester. However, a renewed focus will be put on this effort to leverage it as a benefit for ISU students.

Identity and Culture: Goal 3 and 4 of Idaho State University Strategic Plan

Develop and define an institutional identity for all campus locations, while addressing problematic culture and promoting student and mission-centric culture.

Strategic Plan Planning Process

- Representatives from ISU's student body, staff, faculty, and members of the community will be charged to work collaboratively with University leadership to develop a visionary 15-year strategic. The process will begin fall 2019.

Employee Engagement Task-Force

- Organizational culture and morale has proven to be a significant issue on the campus at Idaho State University, that has unquantified, but potentially severe consequences to operations and the student experience. To address this, the University has launched an effort to leverage a representational group to begin to develop programs, initiatives, and process improvements to improve the experience for faculty and staff of ISU.

Building Relationships and Community: Goal 4 and 5 of Idaho State University Strategic Plan

Build strong relationships with faculty, staff, students, community and industry.

Academic Workforce Program Alignment

- The University will focus on aligning current programs with the business and industry in Idaho and the surrounding region. Each college will begin by identifying the top employers that employ, or could potentially employ their graduates, meeting with these employers to understand their workforce needs, and then begin the process of outlining degree programs to meet those needs.

College Town Charter

- The University will begin working with the city of Pocatello to adopt an agreement outlining how the University and City will support each other and work together on joint initiatives such as marketing, infrastructure beautification, and outreach efforts.

Advisory Councils

- In fall 2019, the University will commission three advisory councils for the Pocatello, Idaho Falls, and Meridian markets. The aim of these councils will be to seek community input on the direction of the University, build a support network, and create connectivity with regional thought-leaders.

Increase Fund-Raising Efforts

- The University is committed to increasing its capacity for fundraising. A search is underway for a new Vice President of Advancement with the goal of building our capacity toward an eventual campaign effort. Further, the University intends to refinance the debt on the Stephens Performing Arts Center and use the present savings to invest in its fundraising capacity. The last year of fundraising has shown a positive trend in both giving and energy in our donor base.

Idaho State University Key Data	FY2015	FY2016	FY2017	FY2018	FY2019
Contributions, Net ¹	\$7,312,660	\$6,036,570	\$5,315,986	\$9,827,927	\$12,444,201
Cash, Property and in Kind Gifts ²	\$8,241,300	\$6,819,544	\$5,150,490	\$11,084,469	\$13,288,124
Endowment Funds ³	\$50,206,402	\$48,958,701	\$53,258,798	\$57,584,648	\$55,475,018
Fund Distributed for Scholarships	\$1,397,610	\$1,882,867	\$1,911,321	\$1,742,248	\$2,032,049
Funds Distributed for University Programs and Capital Projects	\$3,761,159	\$5,164,732	\$3,404,725	\$1,955,349	\$7,200,307
¹ Accrual basis - reflects adjustments for pledges and estimates for uncollectible pledges, stated at NPV ² Cash basis, rather than accrual ³ Not all of the endowed funds are dedicated to scholarships					

Infrastructure: Goal 4 of Idaho State University Strategic Plan

Address problematic systems, process, policies, and physical infrastructure

Budget Model

- The University is in the process of resetting the budget model. Base allocations have not been revisited within institutional memory, and as a result there is not a solid understanding of whether current funding allocations are adequately matched to need. A first step was taken for the fiscal year 2020 budget by providing colleges and universities an all-funds budget commensurate with an average of the previous three years of expenditures. This has allowed a number of reallocations to be made. The next step will be to create a funding allocation model that incentivizes enrollment growth and retention, without creating undue competition among academic units.

Research Process and Policy Improvement

- The University's research enterprise has seen significant declines over time, reflected in the chart below. While the current funding landscape can partially account for this decline, the research policies and processes have also created a significant barrier to faculty research. With the hire of a new Vice President for Research, this position will begin in earnest to address the barriers present and build the right incentive structures to revitalize the research enterprise.

Idaho State University Key Data	FY2015	FY2016	FY2017	FY2018	FY2019 ¹
Research Expenditures	\$26,262,144	\$27,670,658	\$23,716,533	\$22,379,415	\$18,568,618
Total External Awards	\$28,291,449	\$36,979,187	\$21,361,671	\$17,632,520	\$20,321,756
¹ Preliminary figures					

Capital Investments

- In FY 2019, ISU managed 55 Division of Public Works projects valued at \$68 million. In total, 12 projects valued at \$3.8 million were completed and closed out. ISU began construction of the \$7.74 million, 4,490 square foot addition to the Meridian campus. The new addition houses a ground floor anatomy lab and support spaces for ISU and ICOM. The upper floor will become the new home of the Accelerated Nursing program. This project is ahead of schedule and anticipated to be complete by the beginning of August 2019. In addition, the University purchased two parcels of land in Meridian to expand parking and provide additional long-term expansion space.
- The University will also focus on initial programming efforts to construct a new building to replace the Gale Life Sciences facilities. After a facilities analysis, it was determined that the cost of restoring the space would not be economically viable.
- In the coming year, the University will begin restoration efforts on the historic David Field. At this time, the track and field and women's soccer teams cannot utilize the facility. The renovations will provide these programs a competitive space and restore an important community gathering space.
- The University intends to make initial cosmetic upgrades to the University housing inventory. The condition of the University housing is believed to be contributing to retention issues.
- A capital fundraising campaign for a new Alumni Center has been in process for a number of years. The University is confident that the fundraising efforts will be concluded this year providing all the necessary funding to construct the facility..

College and Divisional Accomplishments

College of Arts and Letters

- In collaboration with the College of Business, the Liberal Arts High program has served over 20,000 high school students since its inception. This outreach program provides opportunities for teachers to request a visit and educational experience from a faculty member at ISU, tailored to their course and class needs. Faculty share their expertise with high school students on topics as diverse as forensic science, human rights in literature, and economic development.
- The Department of Sociology, Social Work, and Criminology graduated their first Master of Social Work accelerated cohort this May. These 22 students, who hold positions at the Idaho Department of Health and Welfare, Portneuf Medical Center, and private agencies are now better qualified to execute their roles as social work professionals, meeting the complex needs of the community.

College of Business

- Four student teams from Idaho State University traveled to Boise to compete in the Idaho Entrepreneur Challenge. At the finals, three ISU teams placed, taking home a portion of the competition's \$100,000 in prize money.
- ISU competed for its fifth year at the International Collegiate Business Strategy Competition, which brings together teams from throughout North America who develop their own product, create a business plan and annual report, and compete in a computer-simulated five years of decisions about production, financing, marketing, and more. The competition begins in early February and culminates with an intensive 48 hours of decision-making on-site in California. ISU's team swept the competition in their division, winning trophies for Overall Performance and Best Written Documents.

College of Education

- Collaborated successfully with university faculty in endorsement areas to reduce the number of credits required for endorsement, thereby reducing the time and cost to degree for students and increasing the number of endorsements available at off-campus locations.
- Received a donation from Bill and Marilyn Byrne to create the Joe and Pauline Kent Center for Student Success and received the single largest donor gift in the history of the College from Brian and Julie Armes.

College of Science and Engineering

- The College of Science and Engineering hired four faculty to kick-start the Polytechnic Initiative in Idaho Falls. The Polytechnic will provide education and research opportunities to students and employers in the Idaho Falls area, with a special emphasis on the needs of Idaho National Laboratory.
- Dr. Mary Lou Dunzik-Gougar, Associate Dean of the College of Science and Engineering, Associate Professor of Nuclear Engineering, Senior Reactor Operator has been elected by the membership to serve as President of the American Nuclear Society.

College of Technology

- The College of Technology is helping fill the gender gap that has historically existed in energy-related industries. POWER Careers is a National Science Foundation-funded project to recruit and retain women in Energy Systems Technology & Education Center (ESTEC) engineering technology programs. The goal of POWER Careers is to provide women of all ages a pathway to high-tech, high-wage, and high-demand careers. Since the inception of POWER Careers three years ago, 21 women have graduated with an associate degree in an ESTEC program, a significant increase compared to one or two women per year completing in the past. Eleven more women will graduate next year. This fall, POWER Careers recruitment and retention strategies will be implemented in other programs to encourage women to enter careers in Robotics and Communications Systems Engineering Technology, Unmanned Aerial Systems, Computerized Machining Technology, and Welding.
- The College of Technology is nearing the end of its \$23 million capital campaign; the most successful fundraising effort in the college's history. A \$2.5 million naming gift from Bill and Karin Eames, along with a \$2 million gift from the J.A. and Kathryn Albertson Foundation are the leading major gifts toward the campaign. Committed institutional support, as well as the college securing significant major gifts from many other individuals and industry partners, has brought

the college to \$20 million raised thus far with significant potential to reach the goal of \$23 million by the end of the next fiscal year.

Kasiska Division of Health Sciences

- The Division was formally approved and reorganized into four major colleges: the College of Health Professions, the College of Nursing, the College of Pharmacy, and the College of Rehabilitation and Communication Sciences. Of the 2,554 degrees/certificates awarded at ISU, 722 were awarded from KDHS.

Health Science Degrees and Certificates Awarded - AY2019	
Undergraduate Academic Certificates	32
Associate Degrees	19
Bachelor's Degrees	356
Professional Pharm. D. Degrees	79
Master's Degrees	178
Post Master's Degrees and Certificates	-
Doctorate Degrees	58
KDHS Total	722
ISU Total	2,554

- Bengal Pharmacy operations continue to grow. In 2018, a fifth telepharmacy was opened in Kendrick, Idaho.
- Collaboration efforts continue with our sister institutions to address the health care mission in Idaho. The University's relationship with St. Luke's Hospital continues to grow, and we have developed a post-doctoral fellowship program with this large health system. Collaboration efforts continue with the Idaho College of Osteopathic Medicine, including a joint interprofessional education committee and instructional collaboration in ISU's Treasure Valley Anatomy and Physiology Laboratory.

College of Health Professions

- The Dietetic program had the Master of Nutrition programs with Internship and standalone approved by the SBOE. The program has accepted the first students and will begin August 2019. The Dietetic programs also had approval from the state Department of Public Works to renovate the Foods Lab in Albion Hall. The lab was originally built in the early 1970's, and the remodel was greatly needed. The renovation is in process and is planned for occupancy sometime during the fall 2019 semester.

- The Radiographic Science program received approval from the SBOE to begin a Digital Sonography Certificate program. The first cohort began in June 2019. The program is expected to grow and provide a pipeline of needed sonographers in Idaho.

College of Nursing

- The College of Nursing achieved a 100% pass rate and certification pass rate for both Doctor of Nursing Practice, Family Nurse Practitioner and Psychiatric Mental Health Nurse Practitioner programs.

College of Pharmacy

- Pharmacy students achieved 94% pass rate on the North American Pharmacist Licensure Examination, which is 5 percentage points above the national average.
- The College of Pharmacy achieved a residency match rate of 82% which places the program ninth out of 143 colleges of pharmacy.

College of Rehabilitation and Communication Sciences

- The Doctor of Physical Therapy program expanded to Meridian, with 24 students enrolling on the Meridian campus in Fall 2018. A new cohort of 24 students will start in Fall 2019, and again in Fall 2020, bringing the total number of Doctor of Physical Therapy students to 144 at that time, with 72 in Pocatello and 72 in Meridian. This dramatic expansion provides added opportunity for Idaho students in the Treasure Valley, and it provides a steady stream of new professionals to meet the health care needs of Idaho.
- The interdisciplinary Ph.D. program in Rehabilitation and Communication Sciences was approved, and the first five students are set to begin the program in Fall 2019.

ISU - Meridian

- The ISU Meridian campus continues to grow to meet current and emerging needs for academic program expansion. This year, the University has provided expansion in the Accelerated Nursing Program, Doctorate of Physical Therapy, Doctorate in Rehabilitation and Communication Sciences, Clinical Psychopharmacology Program, and the Master of Science in Nutrition program.
- A number of infrastructure improvements will continue to position Meridian to provide health care education. These include the addition of a new Health Sciences Library, a 12-station gross anatomy lab and fluoroscopy suite, and an expansion to the College of Nursing infrastructure.

ISU - Idaho Falls

- Idaho State University continues to develop the Polytechnic Initiative. This fall four freshly-hired tenure track engineering faculty will begin working in Idaho Falls. Two are in the discipline of nuclear engineering, one is jointly working in computer science and nuclear engineering as a data scientist, and the fourth faculty member is an expert in radio frequency and microwave applications to electrical engineering. ISU will search for three cybersecurity faculty members starting this fall. All of these faculty members have expertise that complements the Idaho National Laboratory.
- Idaho State University continues to work closely with its sister institution the University of Idaho and anticipates that the new polytechnic faculty will collaborate with their counterparts at UI to deliver science and engineering curricula and engage in collaborative research projects. The university is working closely with the newly created College of Eastern Idaho in the development of pathways from earned associate degrees to bachelor degree programs. ISU has a program

termed “Bengal Bound” that ensures that community college transfers are treated the same as students who start at ISU.

ISU - Twin Falls

- Idaho State established an Assistant Dean of Educator Preparation position located in Twin Falls. This position is a joint appointment between ISU and College of Southern Idaho, intended to increase collaboration and response time for students and faculty located in Twin Falls. In addition to this position, Idaho State is working with CSI to identify opportunities for joint faculty appointments between our institutions.
- Idaho State has increased the number of online class offerings to support place-bound students in completing their degree requirements without having to travel to Pocatello.

Advancement

- The University has experienced its best fundraising year ever, with an increase of \$3 million over the previous year.
- Fundraising progressed significantly for the Alumni and Visitors Center. Nearly \$7 million is secured toward the proposed \$8 million facility.

Student Affairs

- The Division of Student Affairs oversaw the creation of Bengal Welcome Center a new central space to welcome prospective students, parents, families, and guests.
- Student Affairs implemented a campuswide software that facilitates management of student conduct, case management, and Title IX.
- Benny's Pantry, the one campus food pantry, is now partnering with the Idaho Food Bank to provide emergency food assistance to ISU students in need. The Idaho Food Bank will supply Benny's Pantry with free food to distribute to students.

Finance and Business Affairs

- The University hired a new Vice President for Finance and Business Affairs.
- Through improved cash management processes was able to increase investment earnings by over \$500,000 per year.
- ISU began the process to overhaul its budgeting model, with the goal of increasing transparency and aligning responsibility with accountability.
- Finance and Business Affairs streamlined the travel process to eliminate unnecessary rules and increase efficiency.
- The University implemented necessary campus pedestrian safety infrastructure across campus.

Office of Research

- A National Science Foundation EPSCOR RII-Track 1 grant was awarded to ISU on behalf of researchers from Sociology and Biological Sciences working collaboratively on the project “Using Genome to Phenome Mechanisms and Patterns to Predict Adaptive Responses of Organisms to Changing Landscapes.”
- External funding to support research and other faculty and student scholarship increased nearly \$2 million to a total of \$19.8 million dollars in awards.
- ISU electrical engineering Director Steve Chiu received Fulbright U.S. Scholar Grant to Iceland to participate in national exchange. His appointment is under the category of Fulbright-National Science Foundation Cyber-Security and Critical Infrastructure Scholar, according to the Iceland-U.S. Fulbright Commission.
- ON Semiconductor continues its support of, and collaboration with, the Idaho State University Department of Electrical Engineering by recently donating an industrial-grade Linux server, eight

state-of-the-art computer workstations and associated design software. The new workstations will be used to train ISU electrical engineering students, and eventually to provide professional graduate-level education to ON Semiconductor employees.

Athletics

- The Athletics department increased scholarship fundraising by 20% and game revenue by 70% over the prior year.
- Upon completion of a comprehensive review, a Gender Equity Committee was established to develop a Five Year Gender Equity Plan and monitor progress over time. Already roster management policies have been implemented to begin working toward proportionality, and budget resources have been reallocated to reflect a more equitable program.
- Athletics Academic Advising has been re-aligned with Central Advising to create a collaborative environment and more appropriately integrate student support services.

PLANNING, POLICY AND GOVERNMENTAL AFFAIRS
AUGUST 29, 2019

IDAHO DIVISION OF CAREER TECHNICAL EDUCATION

SUBJECT

Annual Report

REFERENCE

April 2019

The Board directed the Division of Career Technical Education to start the review process to identify secondary program pathways that could be delivered in an on-line or hybrid format and to report progress at the August Board meeting.

APPLICABLE STATUTE, RULE, OR POLICY

Idaho State Board of Education Governing Policies & Procedures, Section I.M.3.

BACKGROUND/DISCUSSION

This agenda item fulfills the Board's requirement for the Division of Career Technical Education (Division) to provide a progress report on the agency's strategic plan, details of implementation, status of goals and objectives and information on other points of interest in accordance with a schedule and format established by the Board's Executive Director.

Dwight Johnson, State Administrator of the Division, will provide an overview of Division's progress in carrying out the agency's strategic plan.

ATTACHEMENTS

Attachment 1 – Annual Report

STAFF COMMENTS AND RECOMMENDATIONS

The Division of Career Technical Education provides leadership, administrative and technical assistance, and oversight for career technical education programs in Idaho's public secondary schools and technical colleges. The Division is responsible for approximately \$78M in state and federal funds for Idaho's career technical education programs.

BOARD ACTION

This item is for informational purposes only.

ICTE Annual Report

Idaho State Board of Education

August 28, 2019



We prepare Idaho's youth and adults for high-skill, in-demand careers

Dwight Johnson, ICTE State Administrator

Times-News

Career Technical Education: a Top Priority for Idaho

Reader's Comment

DEBBIE CRITCHFIELD

Jul 24, 2019

Goal: Train & Retain a Highly Skilled Workforce

Issues:

- Return On Investment
- Greater Access
- Greater Capacity





Ad Hoc CTE Working Group

CHAIR: LINDA CLARK



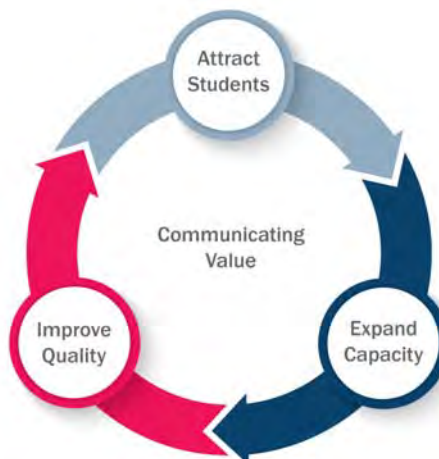
"The 60% goal is for some form of post-secondary qualification, not just a degree. CTE programs offer a critical component of the educational opportunities available to Idaho students that prepare them for the workforce of the future."

DAVID HILL

We prepare Idaho's youth and adults for high-skill, in-demand careers.



Strategic Investments



We prepare Idaho's youth and adults for high-skill, in-demand careers.



Secondary ROI Performance

- **64%** of CTE concentrators went on to college compared to 48% of all Idaho students.
- **95%** of CTE concentrators found a job or moved into postsecondary education, or went into the military.

Post-Secondary ROI Performance

- **95%** of technical college completers found jobs or continued their education.

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Industry Aligned Program Standards

- 52 Career Pathway Standards Completed
- 36 Aligned for Technical College Credit (TCC)

Performance Metrics

- Technical Skill Assessments
- Workforce Readiness Assessments
- Idaho SkillStack® Badges

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Technical Skill Assessment (TSA)

	<u>2016-17</u>	<u>2018-19</u>
Assessments Taken	1,492	3,542
Pass Rate	56%	67%


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Workforce Readiness Assessments (WRA)

	<u>2015-16</u>	<u>2018-19</u>
Assessments Taken	7,364	8,195
Pass Rate	79%	86%


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Idaho SkillStack® Badges

	<u>2016-17</u>	<u>2018-19</u>
Badges Awarded	2,298	6,316
Students Awarded	631	1,662

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Performance-Based Funding

Program Quality Initiative (PQI)

FY19 - \$600,000

- 30 Programs awarded Tech. Assist. Grants
- 23 Rural Districts / 7 Urban Districts

FY20 - \$700,000

- Tech. Assist. + Incentive Grants

IQPS – Ag Program Grants

Annually - \$350,000

- 30 - \$10,000 Incentive Grants
- 2 - \$25,000 Start-Up Grants

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New Incentive Opportunities

Federal Perkins V funding

- Aligned to local industry talent needs
- Focus on Student Career Opportunities

Workforce Readiness Incentive Teacher Bonus

- Initial Funding - \$200,000 for FY20
- Teacher Incentive to graduate Workforce Ready students
- Based on student WRA, TSA, Idaho SkillStack® Badges

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Secondary Programs

	<u>2017/18</u>	<u>2018/19</u>	<u>Trend</u>
CTE Students	59,849	63,207	+ 6%
CTE Concentrators	5,057*	5,415*	+ 7%
CT School Students	14,701**	17,036**	+ 16%

* Concentrators make up 9% of total CTE students (Up from 8%)

** CTS students make up 27% of total CTE students (Up from 25%)

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Tools to Help Local CTE Recruitment

Siemens grant and WDTF grant

- Created Customized Toolkits
- 17 school districts in pilot last year
- Distributed materials statewide this year at REACH Conference

We prepare Idaho's youth and adults for high-skill, in-demand careers.



CTE in the Middle School

- 2018 Legislation moved start of CTE to 7th Grade
- Conducted best practice research
- Launching Pilot with 12 Schools this Fall
- Goal: introductory career exploration experience including CTE opportunities

We prepare Idaho's youth and adults for high-skill, in-demand careers.



Postsecondary Programs

6 Technical Colleges


	<u>2017-18</u>	<u>2018-19</u>	<u>Trend</u>
Degree/Cert. Students	5,597	5,234	- 6%

6 Workforce Training Centers

Short-term, customized training for Idaho businesses

	<u>2016-17</u>	<u>2017-18</u>	<u>Trend</u>
Workers	44,788	50,797	+ 13%

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Strengthening the CTE Teacher Pipeline


INSPIRE Program for Occupationally Certified Teachers

- 2-year Cohort Model
- No out-of-pocket expense for teachers
- Regional Mentorship Structure

Results:

- 66 teachers graduated in first cohort (2019)

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IDAHO
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Career Technical School Expansion

- Currently 17 Career Technical Schools statewide
- 1 more (Lewiston) approved for 2019-20
- 3 more Districts considering for 2020-21





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Value of Career & Technical Education

- Students connected to real careers
- Talent pipeline for Idaho business
- Meaningful education through applied learning

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Opportunities to Communicating Value

- National and State Policy Focus
- Social Media efforts
- Next Steps Website
- CTE Foundation
- Grant opportunity
- Engagement with Teachers/Counselors
- Local Marketing

```
graph TD; A((Attract Students)) --> B((Expand Capacity)); B --> C((Improve Quality)); C --> D((Communicating Value)); D --> A;
```

Thank you!

IDAHO
Career & Technical
Education

PLANNING, POLICY AND GOVERNMENTAL AFFAIRS
AUGUST 29, 2019

DIVISION OF CAREER TECHNICAL EDUCATION / WORKFORCE DEVELOPMENT COUNCIL

SUBJECT

Employment and Training Administration Grant Update

APPLICABLE STATUTE, RULE, OR POLICY

Idaho State Board of Education Governing Policies & Procedures, Section V.N. – Grants and Contracts

ALIGNMENT WITH STRATEGIC PLAN

GOAL 1: Educational System Alignment. Objective B: Alignment and Coordination.

GOAL 3: Educational Attainment. Objective A: Higher Level of Educational Attainment. Objective B: Timely Degree Completion. Objective C: Access.

GOAL 4: Workforce Readiness. Objective A: Workforce Alignment.

BACKGROUND/DISCUSSION

There are more than 7.1 million job openings currently in the United States, many of which require a skilled workforce. These include in-demand cybersecurity professions and emerging occupations involving artificial intelligence (AI) across several industry sectors. Expanding apprenticeships can help individuals gain the skills necessary to fill these vacancies and help employers find skilled workers more readily.

The Employment and Training Administration (ETA) within the U.S. Department of Labor (DOL) announced the availability of approximately \$100 million in grant funds for the Apprenticeships: Closing the Skills Gaps grant program. DOL will award up to \$100 million in H-1B funds initially to fund approximately 16 to 30 apprenticeship grants, with awards ranging from \$500,000 to \$6 million. The amount of grant funding an applicant can receive will depend on the proposed geographic scope of the apprenticeship project.

The overarching goals of this grant program are threefold: (1) to accelerate the expansion of apprenticeships to industry sectors and occupations that have not traditionally deployed apprenticeships for building a skilled workforce, such as cybersecurity, artificial intelligence, and health care; (2) to promote the large-scale expansion of apprenticeships across the nation to a range of employers, including small and medium-sized employers; and (3) to increase apprenticeship opportunities for all Americans.

A lead applicant may include any of the following organizations: an institution of higher education (IHE), an IHE representing a consortium of institutions of higher education; or a state system of higher education, such as a community college system office or a single state higher educational board, or a nonprofit trade, industry or employer association, labor union, or labor management organization.

PLANNING, POLICY AND GOVERNMENTAL AFFAIRS
AUGUST 29, 2019

Through cross agency partnership with the Workforce Development Council (WDC), the Idaho Department of Labor and Division of Career & Technical Education (CTE), the grant would:

- Expand training of apprentices in growing fields of healthcare and cybersecurity in Idaho
- Enhance cross collaboration between CTE, IDOL and WDC on creating a systemwide approach to meeting the skills gap through apprenticeship programs
- Meet the industry needs of local employers (at least three employers are required for the proposal)
- Grow apprenticeships by 200 annually, or 800 over four years at a minimum.

North Idaho College, Lewis-Clark State College, College of Southern Idaho, Idaho State University, and College of Eastern Idaho have indicated interest in participating in the grant. Boise State University is working on a project with WDC that may align and will be invited to join the effort. The team will also reach out to the University of Idaho.

The grant requires a match. WDC will explore use of the Workforce Development Training Fund for outreach aspects of the program as match. In addition, match can come from employers participating in the project through the salaries paid to the apprentices.

Closing date for receipt of applications is September 24, 2019. The grant period is four years, beginning February 2020.

IMPACT

The grant targets the following industries.

Target Industries/Occupations

<u>Option 1 - Occupations in an H-1B Industry</u> <ul style="list-style-type: none">• Information Technology• Healthcare• Advanced Manufacturing	<u>Option 2 – H-1B Occupations</u> <ul style="list-style-type: none">• Community Health Worker• Medical Records and Health Information• Cyber Security Support Technician• Information Technology Generalist• Medical Assistant
---	--

PLANNING, POLICY AND GOVERNMENTAL AFFAIRS
AUGUST 29, 2019

Impact and Scope

Geographic Scope	Funding Level	Required Match	Apprentices Served
Local/Regional	\$500,000 to \$1 million	\$225,000 to \$450,000	800
Local/Regional	\$1 million to \$2 million	\$450,000 to \$900,000	1,600
Statewide	\$2 million to \$4 million	\$900,000 to \$1.8 million	3,200

ATTACHMENTS

Attachment 1 – Apprenticeship: Closing the Skills Gap Grant

STAFF COMMENTS AND RECOMMENDATIONS

Board Policy V.N. Grants and Contracts provides that applications for grants and contracts in excess of one million dollars (\$1,000,000) that require the institution or agency to dedicate current funds or facilities or will obligate the institution or agency or state to dedicate future funding or facilities require approval by the executive director. Cost sharing or other types of in-kind matching requirements are not considered as dedicated commitments. If there is no dedicated funding or facilities obligation, the application may be approved by the chief executive officer of the institution or agency or his or her designee. The Workforce Development Council has indicated the matching requirement would be met through the Workforce Development Fund and not agency or institution funds. Therefore, Board policy does not require Board approval of the grant. The State Board of Education is Idaho's state educational agency. The Executive Director may apply for the grant or one of the participating postsecondary institutions may apply for the grant. The applying agency or institutions would serve as the fiscal agent for the grant.

BOARD ACTION

I move to approve the request by the Division of Career Technical Education and the Workforce Development Council for the State Board of Education to apply for the Apprenticeship: Closing the Skills Gap Grant on behalf of the partnering institutions and agencies.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

U.S. DEPARTMENT OF LABOR
Employment and Training Administration

**NOTICE OF AVAILABILITY OF FUNDS AND FUNDING OPPORTUNITY
ANNOUNCEMENT FOR: Apprenticeships: Closing the Skills Gaps**

ANNOUNCEMENT TYPE: *Initial*

FUNDING OPPORTUNITY NUMBER: *FOA-ETA-19-09*

CATALOG OF FEDERAL DOMESTIC ASSISTANCE (CFDA) NUMBER: *17.268*

KEY DATES: *The closing date for receipt of applications under this Announcement is September 24, 2019. We must receive applications no later than 4:00:00 p.m. Eastern Time.*

ADDRESSES: *Address mailed applications to:*

*The U.S. Department of Labor
Employment and Training Administration, Office of Grants Management
Attention: Brinda Ruggles, Grant Officer
Reference FOA-ETA-09
200 Constitution Avenue, NW, Room N4716
Washington, DC 20210*

For complete application and submission information, including online application instructions, please refer to Section IV. Application and Submission Information.

EXECUTIVE SUMMARY

Building on the experience abroad and in the United States, apprenticeships have emerged as a proven skills instruction model to meet industry's demand for a skilled American workforce. As the 21st economy requires greater skills development with an estimated 65 percent jobs of all jobs requiring some post-secondary education by 2020,¹ apprenticeship programs can bolster the employability and technical skills of workers while meeting the workforce needs of business and industry.

Apprenticeships address both the supply and demand sides of the labor market. They are especially effective in training and educating individuals, which equips them with the skills needed in the workplace. Apprenticeship is also an answer to closing the skills gap – the gap between the needs of employers for a skilled workforce and the skills currently available in the workforce. Since classroom learning is applied in real-world settings, workers are more likely to retain academic as well as occupational skills. Employers are able to sustain high productivity and good-paying jobs when they can rely on those completing an apprenticeship to have mastered an array of relevant skills and to have gained experience in using those skills.²

Some industries with defined career pathways, such as construction and building trades, have embraced apprenticeship's earn-as-you-learn approach, which combines educational or instructional training with a structured, paid, work-based learning component. As job growth surges in other key sectors, such as information technology, including cybersecurity, advanced manufacturing, and health care, there is increasing interest in adopting this approach within these sectors. With the emergence of applications for artificial intelligence, the 21st century economy also offers new opportunities for using the proven model of apprenticeship to reskill and prepare the workforce.

In June 2017, the President issued Executive Order 13801 on Expanding Apprenticeship in America, which lays out an expansive vision for apprenticeship that would increase the number of apprentices in the nation to an unprecedented level across all industries. Noting that apprenticeships “provide affordable paths to good jobs and, ultimately, careers,” the Executive Order directs the Federal government to promote “...apprenticeships and effective workforce development programs,” and encourages trade and industry groups, employers, educational institutions, unions, joint labor-management organizations, and other third parties to collaborate

¹ Carnevale, Anthony, *Recovery: Job Growth and Education Requirements through 2020*, Georgetown University,

² Lerman, Robert I. *Building a Robust Apprenticeship System in the U.S. Why and How?* Meetings of the Labor and Employment Relations Association Allied Social Science Association January 5-7, 2018 Philadelphia, Pennsylvania

to create new apprenticeship solutions. The Executive Order also directs the Secretary to “use available funding to promote apprenticeships.”

There are more than 7.1 million job openings right now in the United States,³ many of which require a skilled workforce. These include in-demand cybersecurity professions and emerging occupations involving artificial intelligence (AI) across several industry sectors. Expanding apprenticeships can help individuals gain the skills necessary to fill these vacancies and help employers find skilled workers more readily.

The Employment and Training Administration (ETA), U.S. Department of Labor (DOL, or the Department, or we) announces the availability of approximately \$100 million in grant funds authorized by Section 414(c) of the American Competitiveness and Workforce Improvement Act of 1998 (ACWIA), as amended (originally codified at 29 USC 2916a and transferred to 29 USC 3224a), for the **Apprenticeships: Closing the Skills Gaps** grant program. We will award up to \$100 million in H-1B funds initially to fund approximately 16 to 30 apprenticeship grants, with awards ranging from \$500,000 to \$6 million. The amount of grant funding an applicant can receive will depend on the proposed geographic scope of the apprenticeship project. Additional grants may be awarded depending on availability of funds.

The purpose of this grant program is to promote apprenticeships as a significant workforce solution in filling current job vacancies and closing the skills gap between employer workforce needs and the skills of the current workforce. The overarching goals of this grant program are threefold: (1) to accelerate the expansion of apprenticeships to industry sectors and occupations that have not traditionally deployed apprenticeships for building a skilled workforce, such as cybersecurity, artificial intelligence, and health care; (2) to promote the large-scale expansion of apprenticeships across the nation to a range of employers, including small and medium-sized employers; and (3) to increase apprenticeship opportunities for all Americans.

Recognizing that apprenticeship is a training strategy that operates on both the supply side and the demand side of the labor market, this grant program aims to increase both the number of apprenticeship positions and the ability of all Americans to gain access to this proven pathway to family-sustaining careers.

Grant funds will be awarded to an apprenticeship partnership of public and private sector entities which together seek to develop and implement new apprenticeship models; or expand an existing apprenticeship program to a new industry sector or occupation, a new population, on a local/regional, statewide, or national scale. A lead applicant may include any of the following organizations: an institution of higher education (IHE), an IHE representing a consortium of

³ Bureau of Labor Statistics, Job Openings and Labor Turnover Survey – February 2019.
<https://www.bls.gov/news.release/jolts.nr0.htm>

institutions of higher education, as defined in Section 102 of the Higher Education Act of 1965 (20 U.S.C. 1002); or a state system of higher education, such as a community college system office or a single state higher educational board, or a nonprofit trade, industry or employer association, labor union, or labor management organization.

The purpose of this grant investment is to provide apprenticeship skills instruction and partially offset the costs of these programs for apprentices. It is not the intention of this grant program to fund the full costs of an apprenticeship program. To further magnify the reach of this grant program, we are requiring these public-private partnerships to secure matching funds, as described in Section III.B. Cost Sharing or Matching.

Given the source of grant funding, the focus of this Funding Opportunity Announcement (FOA) is on training apprentices to reach middle- to high-skilled jobs along a career pathway in a variety of H-1B industries and occupations. A substantial portion of the grant must therefore fund training activities, including the development and implementation of programs that include a paid, work-based learning component and an educational or instructional component that results in the issuance of an industry-recognized credential, and that meet appropriate quality assurance standards. Funds may be used for the provision of supportive services to help apprentices participate in and successfully complete an apprenticeship program. To significantly grow the number of new apprentices, projects funded under this FOA must have the capacity to develop and deploy such training and related services shortly after receiving grant funds.

This grant program will also support an array of activities designed to assist industry in developing and expanding new apprenticeship programs. These activities will include the development of industry-approved, competency-based curricula for both on-the-job and classroom training; and the development of appropriate quality assurance and data systems and processes. Among other benefits, such activities help simplify program development and reduce program start-up times and costs, making it easier for employers to deploy the programs; and promote program consistency and quality, thus facilitating industry-wide acceptance of the apprenticeship model.

On the supply side, this grant program aims to ensure a sustained, rich pool of talent for apprenticeship programs over the long term. Hence, grant funds will support a variety of efforts to increase access to apprenticeship among all Americans, particularly veterans, military spouses, and transitioning service members, and underrepresented populations in apprenticeship, including women, people of color, and ex-offenders.

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I. FUNDING OPPORTUNITY DESCRIPTION

A. PROGRAM PURPOSE

This Announcement solicits applications for the Apprenticeships: Closing the Skills Gap grant program. The purpose of this program is to promote apprenticeships as a significant workforce solution in filling current middle- and high-skilled job vacancies and closing the skills gap between employer workforce needs and the skills of the current workforce.

In June 2017, the President issued Executive Order 13801 on Expanding Apprenticeship in America, which lays out an expansive vision for apprenticeship that would increase the number of apprentices in the nation to an unprecedented level across all industries. The overarching goals of this grant program are threefold: (1) to accelerate the expansion of apprenticeships to new industry sectors and occupations, such as cybersecurity and those involving artificial intelligence; (2) to promote the large-scale expansion of apprenticeships across the nation to a range of employers, including small- and medium-sized employers; and (3) to increase apprenticeship opportunities for all Americans.

Research suggests that employers in the U.S. find value in apprenticeships. In one comprehensive study, nearly all employers surveyed reported that they would recommend their program to others, citing as key benefits the program's ability to help them meet their demand for skilled workers, demonstrate which workers have the needed skill sets, raise productivity and morale, and reduce safety issues.⁴ Moreover, apprenticeships offer a solid return on investment for everyone involved, including the nation as a whole. A 2012 evaluation of 10 states found that, for every dollar invested in apprenticeships, there were \$27 in net benefits and \$35 in total benefits to the public.⁵ We believe that the magnitude of such returns justifies expanding this earn-as-you-learn approach across sectors, including manufacturing, transportation, information technology, health care, and the skilled trades.

Accordingly, this grant program supports the expansion of apprenticeships to industries that have not typically used this model to recruit new apprentices into the workforce, and to upskill those already employed in the industry to bolster the sector's competitiveness. Given the funding source, the industries and occupations that can be targeted with this funding are those

⁴ Lerman, Robert, et al., *The Benefits and Challenges of Registered Apprenticeship: The Sponsors' Perspective*, p. 16 (The Urban Institute Center on Labor, Human Services, and Population, 2009).

http://webarchive.urban.org/UploadedPDF/411907_registered_apprenticeship.pdf

⁵ Reed, Debbie, et al., *An Effectiveness Assessment and Cost-Benefit Analysis of Registered Apprenticeship in 10 States*, p. 40 (Mathematica Policy Research, 2012).

http://wdr.doleta.gov/research/FullText_Documents/ETAOP_2012_10.pdf. See also Helper, Susan, et al., *The Benefits and Costs of Apprenticeships: A Business Perspective* (Case Western Reserve University and the U.S. Department of Commerce, 2016). <https://www.esa.gov/sites/default/files/the-benefits-and-costs-of-apprenticeships-a-business-perspective.pdf>

for which employers are using H-1B visas to hire foreign workers, such as information technology (IT) and IT-related industries, health care, and advanced manufacturing. The Department is particularly interested in expanding the apprenticeship model to cybersecurity and artificial intelligence (AI) professions. In addition, these grants seek to increase the level of apprenticeship activity among employers within these industry sectors that have not traditionally implemented apprenticeship programs, particularly among small- and medium-sized businesses. We believe that investing this funding in apprenticeships within these additional industry sectors and across the range of business types and sizes will have multiplier effects on private sector spending in apprenticeships and in establishing apprenticeship systems as alternative pathways for transitioning workers and for those entering the workforce.

To promote new, high-quality apprenticeship programs and the expansion of existing apprenticeship programs, this grant program will award grant funds to an apprenticeship partnership of public and private sector entities which, working together, will develop and implement new apprenticeship models or expand an existing apprenticeship program to a new industry sector, new population, or a local/regional, statewide, or national scale. These public-private partnerships (as described in Section III.A. Eligible Applicants) will boost apprenticeships by undertaking two major types of interrelated activity: training apprentices and taking apprenticeship programs to scale.

All apprenticeship programs funded through the grant program must include recognized standards of high-quality apprenticeship programs. Moreover, apprenticeship programs that 1) include a paid, work-based learning component and a required educational or instructional component that results in the issuance of an industry-recognized credential, and 2) meet appropriate quality assurance standards, can help fill current job vacancies.

Apprenticeship programs funded and developed under this grant program must have the following characteristics:

1. Paid Work Component

Apprenticeship programs must pay apprentices at least the applicable Federal, state, or local minimum wage or a Federally approved stipend under Federal wage requirements if otherwise applicable, and must describe wage progression requirements. Additionally, programs must address how they will provide apprentices the opportunity to gain upward mobility in the industry.

2. Work-based Learning and Mentorship

An important aspect of apprenticeship programs is offering apprentices the opportunity to apply what they are learning to their work through well-designed and highly structured work experiences. While they are learning on the job, programs must provide mentors to support apprentices and provide guidance on an industry or company culture, and industry or workplace policies and procedures.

3. Educational and Instructional Component

Apprenticeship programs must provide or arrange for classroom or related instruction that is high-quality and adequate to help apprentices achieve their proficiency goals and earn certifications or equivalent credentials. As an important indication of quality programs must lead to an industry-recognized, portable credential, and may also be designed to ensure that apprentices receive college credit for classroom or related instruction.

4. Industry-Recognized Credentials Earned

Apprentices must earn industry-recognized credential(s) as part of their apprenticeship programs. The credential(s) earned in the program must be portable, and applicants must identify all of the portability benefits in the application. In sectors in which generally accepted credentials already exist, or will be issued by industry organizations or credentialing bodies, applicants must describe whether program completion will result in one or more of these existing credentials or qualify an apprentice to sit for relevant credentialing exams. In sectors where independent credentials exist and are not issued by the apprenticeship program, the applicant must describe the alternative credential(s) that apprentices may earn and information on who is offering the exam

5. Safety, Supervision, and Equal Employment Opportunity

Apprenticeship programs must have policies and procedures in place to ensure a safe working environment that adheres to all applicable Federal, state, and local safety, employment, and equal opportunity laws and regulations.

Grantees may establish new apprenticeship programs, create the training infrastructure/network necessary to deploy these programs, expand existing apprenticeships, and promote all grant-funded apprenticeship programs within a local/regional, statewide or national scope.

Grant funds must be used primarily to support the training of apprentices in new or expanded programs. Allowable training and training-related activities include funding the costs of developing and delivering training through the educational or instructional components, paid, work-based learning components, and some supportive services, such as childcare and transportation, designed to assist apprentices to participate and remain in an apprenticeship program.

A related activity necessary to support the expansion of training for apprentices is assisting partners in their efforts to create and implement the new or expanded apprenticeship programs, which is another critical component of the work under this grant program.

Key activities that will help partners accelerate the expansion of apprenticeship programs may include the development of industry-approved, competency-based curricula for both educational or instructional training, and paid, work-based learning components; the creation of competency-based occupational standards for a particular industry sector or occupation, including industry-issued, nationally recognized, portable credentials related to the applicant's targeted industry and/or occupation(s) (hereinafter "industry-recognized credentials" and

described further in Section I.E. Program Activities/Allowable Activities)⁶; the development of appropriate quality assurance and data systems and processes to ensure the consistency and quality of the new apprenticeship programs; and outreach to a range of small- and medium-sized businesses to expand apprenticeships broadly within industry sectors.

To enlarge the field of apprenticeship sponsors, we intend for this grant program to raise the visibility of apprenticeship as an effective and innovative post-secondary education and training pathway. In parallel, these efforts are meant to increase industry confidence in the model. As a result, we expect that this infusion of public funds will increase the willingness of the private sector to further invest in apprenticeships as a model to close the skills gap within specific industry sectors and/or occupations. To accelerate the realization of this goal, we are requiring that the public-private partnerships funded under this FOA secure a 45 percent match, as discussed in Section III.B. Cost Sharing or Matching.

In addition to expanding the reach of apprenticeships by increasing the number of employers willing to sponsor them, this grant program aims to ensure a sustained, rich supply of talent for apprenticeship programs over the long term. Thus, additional efforts are needed to expand the pool of workers who see apprenticeships as a well-respected training opportunity that is available to them. Grant-funded projects should strive to increase apprenticeship opportunities for all Americans, focusing particularly on veterans, military spouses, transitioning service members, and underrepresented populations in apprenticeship, including women, people of color, and ex-offenders.

B. PROGRAM AUTHORITY

The Apprenticeships: Closing the Skills Gaps grant program is authorized under Section 414(c) of the American Competitiveness and Workforce Improvement Act of 1998 (ACWIA), as amended (codified at 29 U.S.C. 3224a). These grants are financed by a user fee paid by employers to bring foreign workers into the United States under the H-1B nonimmigrant visa program.

C. TARGET INDUSTRIES

⁶ For more information on credentials, see ETA Training and Employment Guidance Letter (TEGL) No. 15-10, "Increasing Credential, Degree, and Certificate Attainment by Participants of the Public Workforce System," particularly Attachment 2, "Credential Reference Guide," at https://wdr.doleta.gov/directives/corr_doc.cfm?DOCN=2967.

The Apprenticeships: Closing the Skills Gaps grant program will fund projects that expand apprenticeships to industries in which apprenticeships may traditionally be unavailable or underrepresented by providing apprenticeship training that leads to well-paying, middle- and high-skilled jobs across a diversity of H-1B industries and occupations. While program participants do not need to have those skill levels to enter the apprenticeship programs, the grant projects must be set up to help move apprentices along a career pathway to earn the education and paid work-based learning experience that will result in employment in middle- and high-skilled jobs.

To help American industry reduce the need for skilled foreign workers under the H-1B visa program, applicants must design their apprenticeship programs to target one of the following:

Option 1: Occupations in an H-1B industry – Applicants may choose to expand apprenticeships in an H-1B industry. An H-1B industry is an industry in which the Department has certified H-1B visas for occupations in that industry. The list of H-1B industries that are acceptable for applications is found in Appendix A. These industries are the information technology (IT) and IT-related industries, health care, and advanced manufacturing. Applicants may propose occupations across one or more H-1B industries, target multiple occupations within an H-1B industry, or narrow their focus to a specific occupation within an H-1B industry.

If using Option 1, applicants that do not clearly identify they are serving one of the H-1B industries identified in Appendix A will be found non-responsive and will not be considered.

Option 2: H-1B occupations – Applicants may choose to target a specific H-1B occupation(s) for which a significant number of H-1B visas have been certified, even if that occupation is not in one of the identified H-1B industries listed in Appendix A. If this occupation is not within the H-1B industries identified in Appendix A, the application must provide data showing that the H-1B occupation is one for which a significant number of H-1B visas have been certified. Applicants must use verifiable data to make this demonstration, such as data provided by DOL's Foreign Labor Certification Data Center. Applicants may propose to serve more than one H-1B occupation. The Department is particularly interested in expanding apprenticeships in cybersecurity and AI occupations.

If using Option 2, applicants that do not demonstrate they are proposing to serve an H-1B occupation and provide justification for a specific H-1B occupation(s) on the application will be found non-responsive and will not be considered.

D. GEOGRAPHIC SCOPE

Applicants must identify the geographic scope of the proposed project. Applicants may choose one of the following geographic scopes: local/regional, statewide, or national. The geographic scope is the physical service area in which awarded applicants will serve participants.

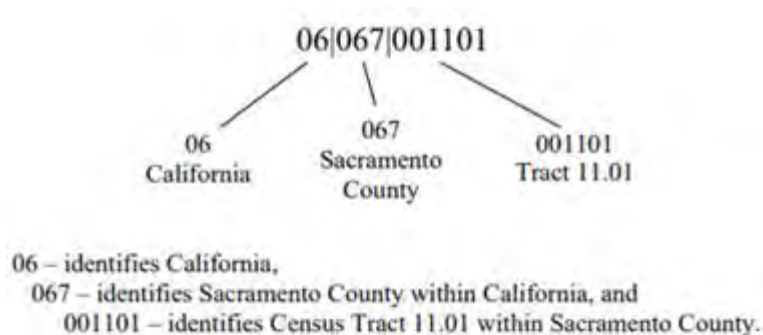
- **Local/regional** means serving a part of one state or a contiguous area that includes multiple sites in a regional workforce area that may cross more than one state.
- **Statewide** means serving an entire state or multiple non-contiguous sites within one state.
- **National** means serving multiple states in multiple locations across the country. The service area does not need to be contiguous.

Applicants that demonstrate, in their abstract, that at least one census tract within their physical service area is designated by the Secretary of Treasury as a qualified Opportunity Zone will receive two points toward their overall application score. Applicants will not receive additional points for multiple Opportunity Zones within the proposed physical service area.

For more information on Opportunity Zones, go to:

<https://www.irs.gov/newsroom/opportunity-zones-frequently-asked-questions>.

Please be aware the IRS list provides the full 11-digit census tract number. Use the example below to identify your census tract number(s):



E. PROGRAM ACTIVITIES/ALLOWABLE ACTIVITIES

The Apprenticeships: Closing the Skills Gaps grant program will expand apprenticeship opportunities within H-1B occupations and industry sectors, particularly those sectors that have not deployed apprenticeships on a large scale previously, and increase the number and types of workers participating as apprentices. Therefore, grant project activities will include establishing new apprenticeship programs or expanding existing apprenticeship programs, creating the training infrastructure/network to deploy the new programs, promoting apprenticeship programs on a local/regional, statewide, or national scale, and developing training activities for an expanded pool of individual apprentices in the newly certified or expanded programs.

Applicants must design workforce development strategies that comprise all of the following activities:

- 1) Expanding existing apprenticeships or deploying a new apprenticeship program within an H-1B industry or for an H-1B occupation in a local/regional, statewide or national scope. This includes developing program standards, meeting quality standards, and obtaining promotion and adoption by a significant number of employers within the sector;
- 2) Recruiting a diverse and large number of apprentices for a robust workforce;
- 3) Offering earn-as-you-learn education and training models that prepare individuals to successfully move into middle- to high-skilled employment;
- 4) Engaging a wide array of employers, large and small, in the adoption and deployment of apprenticeships to greatly expand apprenticeship opportunities; and
- 5) Developing a system for reviewing, approving, collecting data from, and monitoring apprenticeship programs to assess the quality of the training standards, materials, and programs.

In addition, all applicants must provide outreach plans for promoting apprenticeship to a broad network of employers, including small employers. The outreach plans must demonstrate significant reach within the identified occupation(s) or industry sector(s). Applicants must also provide customer-focused and technical assistance supports to this network of employers to enable them to implement the new apprenticeship programs.

1. Deploying Apprenticeship Training

A central goal of this grant program is to catalyze the training of significant numbers of new apprentices. These apprentices may include unemployed individuals seeking entry or reentry into the workforce, underemployed workers in need of new skills and opportunities, incumbent workers who need to increase their skills to remain competitive, employed individuals who would like to transition to a career in an H-1B industry and/or occupation, and military service members who are transitioning to the civilian workforce.

DOL will fund apprenticeship training and supporting activities to ensure that the program(s) meet the needs of employers and apprentices. The characteristics of high-quality apprenticeship programs described in Section I. A. Program Purpose distinguish apprenticeship programs from other types of work-based learning. All apprenticeship programs funded through the grant program must include recognized standards of high-quality apprenticeship programs.

a) Allowable Training Activities

Applicants may use grant funds to support the following training and training-related activities:

1) Establish New Apprenticeship Programs

Applicants may propose the development of new high-quality apprenticeship programs where an individual obtains workplace-relevant knowledge and skills that include both a paid, work-based learning component combined with an educational or instructional component. As an important indication of quality, programs must lead to an industry-recognized, portable credential. The educational or instructional component may also be designed to ensure that apprentices receive college credit for classroom or related instruction.

2) Expand Registered Apprenticeships Programs (RAPs)

Registered Apprenticeship Programs (29 CFR part 29) combine an educational or instructional component with a paid work-based learning component. Apprentices are hired and earn a wage upon registration, and receive progressive wages commensurate with their skill attainment throughout the training program. Upon successful completion of all phases of work-based learning and related instruction components, registered apprentices receive nationally recognized certificates of completion leading to long-term career opportunities. For more information on RAPs, please visit www.apprenticeship.gov.

3) Supportive Services

Grant funds may be used to provide some supportive services for training apprentices, up to 10 percent of grant funds. Supportive services are those necessary to enable an individual to participate in education and training activities funded through this grant program. Examples of such services may include transportation, childcare, dependent care, housing, and needs-related payments. Grantees may fund supportive services through various means, including, but not limited to, providing the actual supportive service (e.g., childcare), providing apprentices with a voucher for the service (e.g., public transportation cards or tokens), or providing a stipend directly to the apprentice. See Section IV.E.5. Use of Funds for Supportive Services.

A wide range of activities may assist applicants in their efforts to deploy apprenticeship training, establish new apprenticeships, and/or expand existing apprenticeship programs. Accordingly, applicants may propose to use grant funds to undertake additional activities designed to create an environment for apprenticeship expansion and training opportunities, including, but not limited to those listed in Section I.E.1b) and 1c) below:

b) Allowable Activities for Establishing New Apprenticeships

Applicants may use grant funds to support the following activities for establishing new apprenticeships:

- Developing apprenticeship programs in the proposed geographic scope as described in Section I.D. Geographic Scope;
- Engaging employers in developing standardized or centralized training (such as online programs delivered by an education provider or trade association) to train mentors and other trainers who may be experts in their craft, but have limited experience teaching and mentoring novice workers;
- Developing competency-based apprenticeship standards for the proposed industry sector(s) or occupation(s) that include, at a minimum, the provision of industry-recognized credentials;
- Developing educational resources and training materials that could be used by community colleges, training providers, trade associations or individual companies to facilitate high-quality and consistent educational or instructional components - thus addressing one of the most significant barriers to apprenticeship program development. ETA encourages applicants to leverage existing educational and instructional resources by adapting the Trade Adjustment Assistance Community College and Career Training (TAACCCT) grantee resources and materials to align with industry standards. See Appendix B for links to a web tool for identifying TAACCCT grantees and an online repository of TAACCCT grantee materials;
- Developing new occupational standards, or leveraging existing occupational standards, that document the level of skill, education, and knowledge required in a range of occupations to achieve an apprenticeship credential. ETA encourages applicants to adopt or adapt the National Occupational Frameworks (NOFs), a set of voluntary, consensus-based apprenticeship standards that are approved by DOL and developed in partnership with employers and a range of other partners. While designed to support competency-based programs, the NOFs can easily be adapted to support time-based or hybrid programs as well. See Appendix C for a link to the NOFs on the Urban Institute's web page;
- Conducting outreach to employers to expand apprenticeship broadly within the proposed industry sector(s) or occupation(s). Beyond training materials and models, businesses may receive technical assistance to deploy apprenticeship training;
- Establishing third-party review of apprenticeship standards, including educational materials, curriculum standards, and work-based learning standards to determine college credit equivalency through organizations such as the National College Credit Recommendation Service or the American Council on Education; and
- Developing a process or system for reviewing, approving, and collecting data from apprenticeship programs to assess the quality of the training standards, materials, and programs.

c) Allowable Activities that Support the Expansion of Apprenticeship Opportunity

- Updating existing curricula to meet the needs of employer partners;
- Tailoring apprenticeship-training activities for online or virtual application to meet the needs of apprentices;
- Developing outreach and promotion campaigns to support increased awareness of apprenticeships for employers, potential apprentices (particularly veterans, military spouses, transitioning service members, and underrepresented populations in apprenticeships, including women, people of color, and ex-offenders), educators, the general public, etc.;
- Recruiting eligible individuals;
- Developing career awareness materials;
- Costs associated with the development of competency-based apprenticeship training or other accelerated learning models;
- Hiring, assigning, or developing qualified instructors and subject matter experts (including the costs of salaries and benefits) to assist in the delivery of new curricula;
- Using subject matter experts from industry, apprenticeship, education, labor, or other areas to assist in updating, replicating, or customizing existing industry-recognized curricula to support educational or instructional components;
- Developing articulation agreements with universities and other educational partners that allow for recognition of apprenticeship training toward college credit;
- Conducting prior learning assessments to determine the number of college credits that can be awarded for apprentices who receive their apprenticeship certificate of completion;
- Conducting assessments to determine skill levels, aptitudes, abilities, and competencies of apprentices;
- Costs related to awarding of Certificates of Training and/or Certificates of Completion of Apprenticeship credentials;
- Building system/infrastructure capacity to organize and/or analyze program data for continuous improvement and program evaluation;
- Leveraging and aligning existing Federal resources to ensure that efforts can move from planning to implementation to sustainability; and

- Project oversight and management, grant reporting, and other administrative functions.

Applicants should also refer to Section VI. Award Administration Information for a list of relevant regulations and guidance related to cost principles, administrative, and other requirements that apply to this funding opportunity, and to Section IV.E. Funding Restrictions for a discussion of costs that are not allowable under this Announcement.

II. AWARD INFORMATION

A. AWARD TYPE AND AMOUNT

Funding will be provided in the form of a grant. We expect availability of approximately \$100 million to fund approximately 16 to 30 grants ranging from \$500,000 to \$6 million each based on the geographic scope of the project. You may apply for a ceiling amount of up to \$6 million. You must request funding that is commensurate with the geographic scope of the project proposed, as described below. Awards made under this Announcement are subject to the availability of Federal funds. In the event that additional funds become available, we may use such funds to select additional grantees from applications submitted in response to this Announcement.

To ensure that grant funds result in services to significant numbers of apprentices, we have established goals for the minimum numbers of apprentices to be served during the period of performance, based on the geographic scope of the project (see Figure 1 below). These minimum numbers are reflective of the number of apprentices to be served with grants funds combined with the 45 percent matching funds requirement. The intent of this grant investment is to provide apprenticeship training and partially offset the costs of training and services for apprentices. To successfully meet the minimum goal for apprentices served, applicants must secure matching funds in an amount equal to 45 percent of the total requested funds.

Applicants should identify cash and in-kind matched resources to meet the service and training needs of all apprentices served. This includes support from private sector investment funds (e.g., staff, time, services, products, and other non-cash resources matched from businesses, industry associations, labor organizations, or education and training providers). Matched resources are a critical component of the project design and applicants will be scored based on the strength of these matched resources, as described in Section III. B1. Matching Funds.

The number of apprentices served means those individuals who receive grant-funded and/or match-funded services in support of their apprenticeship training goals. Applicants must identify in the project narrative (described in more detail in Section IV.B.3.b) Expected Outcomes and Outputs) the number of apprentices to be served through the project, in alignment with the FOA-established goals based on the geographic scope of the project and the

amount of funds requested. Only projects proposing a national geographic scope may request a funding level of \$4 to \$6 million. See Figure 1 below.

Figure 1. Minimum Goals for Grant Apprentices Served During the Grant Period, Based on Funding Request⁷		
GEOGRAPHIC SCOPE	FUNDING LEVEL (H-1B Funds Requested + Required 45% Matching Funds)	MINIMUM APPRENTICES SERVED
Local/Regional Scale Serving a part of one state, or a contiguous area that includes multiple sites in a regional workforce area that may cross more than one state. or Statewide Scale Serving an entire state or multiple non-contiguous sites within a state. or National Scale Serving multiple states in multiple locations across the country. The service area does not need to be contiguous.	\$500,000 (+ \$225,000 match) to \$1,000,000 (+ \$450,000 match)	800
	\$1,000,001(+ \$450,001 match) to \$2,000,000 (+ \$900,000 match)	1,600
	\$2,000,001(+ \$900,001 match) to \$4,000,000 (+ \$1,800,000 match)	3,200
National Scale Serving multiple states in multiple locations across the	\$4,000,001 (+ \$1,800,001 match) to \$6,000,000 (+ \$2,700,000 match)	5,000+

⁷ The minimum goals, listed above in Figure 1, identify the minimum number of apprentices the project must serve during the grant period, based on the applicant's requested funding amount. These are the minimum numbers of apprentices to be served through the grant, and applicants are strongly encouraged to serve more than the minimum thresholds. Applicants must propose apprentice targets that are based on the FOA requirements and that are appropriate for the geographic scope of their proposed project.

country. The service area does not need to be contiguous.		
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B. PERIOD OF PERFORMANCE

The period of performance is 48 months with an anticipated start date of February 1, 2020. This performance period includes all necessary implementation and start-up activities. These activities include: promoting apprenticeship programs within the targeted H-1B industry and/or occupation(s) on a local/regional, statewide, or national scale; developing or expanding training activities for apprentices; providing training to apprentices; and follow-up for tracking and reporting performance outcomes. We expect hiring appropriate grant project personnel and undertaking start-up activities will begin immediately and expect that grantees will begin enrolling apprentices no later than nine months after the date of grant award. For those applicants that propose a national scope for their project, we also expect that applicants will begin to expand their apprenticeship program nationally, at least by the beginning of the fourth year of the grant. We strongly encourage applicants to develop their project work plans and timelines accordingly. Grantees must plan to fully expend grant funds during the period of performance.

III. ELIGIBILITY INFORMATION

A. ELIGIBLE APPLICANTS

In keeping with the authority provided by Congress under ACWIA, grants under this program will be awarded to an apprenticeship partnership of public and private sector entities. Grants will be awarded to the lead applicant of an apprenticeship partnership, which will serve as the grantee and have overall fiscal and administrative responsibility for the grant. The apprenticeship partnership must 1) include as lead applicant an institution of higher education (IHE), or an institution of higher education representing a consortium of IHEs, or a state system of higher education, such as a community college system office or a single state higher educational board; or a nonprofit trade, industry, or employer association; labor union; labor-management organization and 2) include representatives of each of the required partner entities, which collectively form the “apprenticeship partnership.” The apprenticeship partnership, including the lead applicant, must include public and private sector entities; otherwise the application will be considered non-responsive and will not be considered or reviewed. Applications that do not have an institution of higher education (IHE) or an institution of higher education representing a consortium of IHEs or a single state higher educational board as the lead entity, and the required public and private partners, or a nonprofit trade, industry, or employer association, labor union, labor management organization will be

considered non-responsive and will not be considered or reviewed. An entity cannot serve as more than one type of required partner for the purpose of meeting FOA requirements.

The requirement for a private sector partner is described in Section III.A.2.a)1) Required Partner(s), Employer Partner(s).

1. Eligible Lead Applicant Entities

This funding opportunity is open to all eligible applicants as identified below. The following organizations are eligible to apply as a lead applicant:

For the purposes of this FOA, the lead applicant in the apprenticeship partnership are an institution of higher education (IHE), or an IHE representing a consortium of IHEs, as defined in Section 102 of the Higher Education Act of 1965 (20 U.S.C. 1002); or a state system of higher education, such as a community college system office or a single state higher educational board; or a nonprofit trade, industry or employer association; labor unions; labor-management organizations⁸. Applications that do not include a lead applicant that meets the eligibility requirements of one of the types of entities mentioned above will be considered non-responsive and will not be reviewed.

To be eligible for inclusion in the apprenticeship partnership, a lead applicant that is an IHE must be accredited, by the closing date of this FOA and remain so throughout the entity's performance in this grant program, by a nationally recognized accrediting agency or association that has been recognized by the U.S. Department of Education. A database of institutions that are accredited by bodies recognized by the U.S. Department of Education can be found at <http://ope.ed.gov/accreditation/>. Generally, institutions of higher education are two-year and four-year colleges and universities, including institutions that serve minorities (e.g., Historically Black Colleges and Universities, Tribal Colleges and Universities, Hispanic-Serving Institutions, Asian American and Native American Pacific Islander-Serving Institutions, or others designated by the U.S. Department of Education at <http://www2.ed.gov/about/offices/list/ocr/edlite-minorityinst.html>).

Lead applicants must identify their institution type in Section 9 of the SF-424 Application for Federal Assistance. A lead applicant that is an IHE must submit documentation as an attachment verifying that it is an institution of higher education accredited by an agency that has been recognized by the U.S. Department of Education. Applicants that do not provide this documentation will be considered non-responsive.

⁸ Trade, industry, or employer associations, also known as industry trade groups, business associations, sector associations, or industry bodies, are nonprofit organizations founded and funded by businesses that operate in a specific industry.

Please note that all elements of 2 CFR Part 200 (Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards) and 2 CFR Part 2900 (DOL's Supplement to 2 CFR Part 200) apply to any entity that carries out a Federal award as a recipient or subrecipient, including for-profit organizations. This includes the monitoring and the examination of their records. In addition, the entity may not earn or keep any profit resulting from Federal financial assistance.

a) Role of Lead Applicant

In the required Abstract (see Section IV.B.4. Attachments to the Project Narrative), you must clearly identify the lead applicant and each member of the apprenticeship partnership.

The lead applicant will serve as the grantee, must be the organization specified in Section 8 of the SF-424 Application Form, and will be: 1) the point of contact with the Department to receive and respond to all inquiries or communications under this FOA and any subsequent grant award; 2) the entity with authority to withdraw or draw down funds through the Department of Health and Human Services - Payment Management System (HHS-PMS); 3) the entity responsible for submitting to the Department all deliverables under the grant, including all technical and financial reports related to the project, regardless of which partnership member performed the work; 4) the entity that may request or agree to a revision or amendment of the grant agreement or statement of work; 5) the entity with overall responsibility for carrying out the programmatic functions of the grant, as well as for the stewardship of all expenditures under the grant; 6) the entity responsible for coordinating with the national evaluator, including participating in an evaluation and other studies, if selected by DOL; and 7) the entity responsible for working with DOL to close out the grant.

2. Apprenticeship Partnership

The applicant must identify and include the required partners listed below, and represents both public and private partner institutions. Those organizations collectively form the "apprenticeship partnership," and demonstrate strong engagement of the required partners necessary to expand apprenticeships. Additionally, applicants should consider including additional optional partners that support the goals of the apprenticeship partnership.

a) Required Partners

To demonstrate the active involvement of the required apprenticeship partnership entities, applicants must provide signed documentation of commitments – such as signed memoranda of understanding, a partnership agreement, or other types of signed agreements – which demonstrate the commitment of each type of entity listed below.

Applicants will be scored based on the inclusion of this documentation, as well as the level and quality of involvement in the project as described in Section IV. B. 3c) a. Apprenticeship Partnership. Required partners in the apprenticeship partnership include:

1) Employer Partners

Applicants proposing to serve a local/regional or statewide geographic scope are required to partner with at least three employers that will implement apprenticeships. Applicants proposing to serve a national geographic scope are required to partner with at least five employers. These employer partners will be engaged in developing the apprenticeship program and hiring and training apprentices. Employers lend their expertise on skills development by: 1) defining the program goals and activities; 2) identifying necessary skills and competencies; 3) providing resources to support education; 4) providing assistance with the apprenticeship program design and implementation; 5) hiring qualified participants in apprenticeship opportunities and providing mentors for work-based learning; and 6) helping to solicit employer feedback on the skills and competencies of workers completing training and placed into employment.

2) Institutions of Higher Education

If the lead applicant is not an IHE, applicants must include in their apprenticeship partnership an IHE or a consortia of IHEs, as defined in Section 102 of the Higher Education Act of 1965 (20 U.S.C. 1002); that offer skills instruction for the apprentices.

b) Optional Partners

While the required private sector partner(s) reflect the scope and reach of the project, we strongly encourage applicants to collaborate with other partners that can support and advance the work of the apprenticeship partnership. These include: additional trade and industry groups; employers; non-profit organizations; educational institutions; labor unions; joint labor-management organizations; education and job training providers; community colleges; other organizations to support outreach and training activities; Small Business Development Centers; community organizations that provide social support and/or wrap-around services; State Apprenticeship Agencies; foundations and philanthropic organizations; and Federally-funded programs.

Applicants may opt to include as partners organizations involved in administering the workforce investment system established under the Workforce Innovation and Opportunity Act (WIOA), (including State and Local Workforce Development Boards under Sections 101 and 107 of WIOA (29 U.S.C. 3111 and 3122), American Job Center Operators under Section 121(d) of WIOA (29 U.S.C. 3151(d)), and Native American Program entities eligible for funding under Section 166 of WIOA (29 U.S.C. 3221).

These organizations have expertise in workforce development and may provide leadership in implementing the following types of activities: 1) understanding and analyzing the need for education and training in the local area, including identifying targeted industries, occupations, regional clusters, and hiring needs, and populations to be served, and providing relevant sources of data, including labor market information, and other tools or reports; 2) assessing potential participants for the grant program; 3) identifying and referring potential apprentice candidates for education and training in the grant program; 4) providing additional supportive services; 5) connecting and placing participants with employers that have apprenticeship opportunities; and 6) collecting, tracking, and reporting participant data to DOL and the Department of Education.

Applicants that are proposing to develop new apprenticeship programs are strongly encouraged to partner with professional, industry groups, and academic institutions that can accredit apprenticeship training received through the grant as meeting national industry standards and provide quality assurance.

B. COST SHARING OR MATCHING

1. Matching Funds

This program requires cost sharing or matching funds. Such funds may be in the form of cash or in-kind contributions and must be equal to 45 percent of the total Federal share of costs. Any resources contributed to the project in addition to cost sharing or matching funds will be considered leveraged resources. Section IV.B.2 Project Budget provides more information on leveraged resources.

To be allowable as part of match, an expenditure must be an allowable charge for Federal grant funds and considered necessary and reasonable to accomplish the project or program objectives. DOL will make determinations of allowable costs in accordance with the applicable Federal Cost Principles as indicated in Section IV.E Funding Restrictions.

In addition to the requirements related to match in the Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards: Final Rule at 2 CFR Part 200, 2 CFR 2900.8 states that: "In addition to the guidance set forth in 2 CFR 200.306(b) for Federal awards from the Department of Labor, the non-Federal entity accounts for funds used for cost sharing or match within their accounting systems as the funds are expended." It is not sufficient or adequate to receive and report monies as match; the monies must be expended on the program in order for it to be counted as match. Expenditures of match funds must be reported on the recipient share section of the ETA-9130 Form.

Additionally, in accordance with 2 CFR 200.306, the match amount must be: verifiable from the non-Federal entity's records, not included as contributions for any other Federal award,

necessary and reasonable for the accomplishment of project or program objectives, and not provided by the Federal government under another Federal award.

DOL encourages applicants to leverage additional resources beyond the required match to supplement grant activities. Applicants must count and document as leveraged resources any cash or in-kind commitments beyond 45 percent of the grant award amount required as matching funds.

Both matching and leveraged resources can come from a variety of sources, including, but not limited to: the private sector (e.g., businesses or industry associations); the investor community (e.g., angel networks or economic development entities); the philanthropic community (e.g., foundations); and the non-profit sector (e.g., community organizations, faith-based organizations, or education and training institutions). Non-Federal, public sector funds (e.g., from States or local governments) may be used for matching funds, if necessary.

For the purposes of the grant application, the match explanation in the budget narrative must contain:

- Total dollar value of commitment, per year of grant and full period of performance;
- The source of match funds;
- A list of each of the partner organizations and the amount of match from each partners, particularly any employer partners that are providing match; and
- Detailed calculations showing how the total dollar value was derived.
 - For match based on participants served, the calculation should be: $__ \text{ participants enrolled} \times __ \text{ cost of training/class/session per participant per year} \times __ \text{ years of the commitment} = \text{total commitment}$
 - Example: XYZ Community College is committing 10 slots per year in a computer programming class. The match explanation must read: $10 \text{ slots} \times \$500 \text{ per slot} \times 2 \text{ years} = \$10,000$
 - For match based on staff time, the calculation should be: $__ \text{ hours per year (or percentage of FTE)} \times __ \text{ hourly rate (or annual salary)} \times __ \text{ years of commitment} = \text{total commitment}$
 - Example: Applicant is committing Executive Director for 20 percent of the FTE over the life of the grant. The match explanation letter must read: $20 \text{ percent} \times \$75,000 \text{ per year} \times 3 \text{ years} = \$45,000$
 - For match based on a set resource, the calculation should be: $__ \text{ monthly rate} \times __ \text{ months per year} \times __ \text{ years of commitment} = \text{total commitment}$
 - Example: ABC Organization is committing office space for the program. The match explanation letter must read: $800 \text{ square feet} \times \$2.00/\text{sq. ft.} \times 12 \text{ months} \times 3 \text{ years} = \$57,600.$
 - Please see 2 CFR 200.306 for additional information on how to calculate the contribution of services and property.

The valuation process of in-kind match includes determining the fair market value of an expenditure at the time of donation, appraising donated space and buildings, and determining the value of personnel services. The value of personnel services will depend, in part, on the staff person's role on the grant relative to their role in the overall organization. Calculations must be clear and able to be replicated by reviewers.

During the period of performance, the grantee must meet the supporting documentation requirements of matching as specified in 2 CFR 200.306. DOL recognizes the match at the time it is expended, as specified in 2 CFR 2900.8, and not when it is earned or received. Additionally, the grant recipient must apply the same supporting documentation requirement to tracking match expenditures as it would to grant expenditures.

2. Paid Time for Apprentices

The portion of an apprentice's salary paid by an employer while the worker is participating in the instruction component of the apprenticeship program (i.e., employee paid release time) may be counted as a match under these grants. For employer partners (or subrecipients), the salary paid while the worker is in training may be counted as cash match. Fringe benefits and other personnel benefits cannot be counted as match.

3. Fulfilling the Match Requirement

Applicants are expected to fulfill the match amount specified on the SF-424 during the grant period of performance. If the match amount specified is not met or if a portion of the matching funds are found to be unallowable costs, the amount of DOL grant funds will be decreased on a dollar-for-dollar basis. If this occurs, the grantee will be required to repay funds to DOL.

4. Reporting Match and Leveraged Resources

DOL grantees must track and report both match and leveraged resources quarterly on ETA Form 9130. Instructions and the ETA Form 9130 may be found at http://www.doleta.gov/grants/financial_reporting.cfm

C. OTHER INFORMATION

1. Application Screening Criteria

You should use the checklist below as a guide when preparing your application package to ensure that the application has met all of the screening criteria. Note that this checklist is only an aid for applicants and should not be included in the application package. We urge

you to use this checklist to ensure that your application contains all required items. If your application does not meet all of the screening criteria, it will be considered incomplete and non-responsive, and it will not move forward through the merit review process.

Application Requirement	Instructions	Complete?
The deadline submission requirements are met	Section IV.C	
Eligibility	Section III.A	
If submitted through Grants.gov, the components of the application are saved in any of the specified formats and are not corrupt. <i>(We will attempt to open the document, but will not take any additional measures in the event of problems with opening.)</i>	Section IV.C.2	
Application for Federal funds request is within the grant award range of \$500,000 to \$6 million	Section II.A	
SAM Registration	Section IV.B.1	
SF-424, Application for Federal Assistance	Section IV.B.1	
SF-424 includes a DUNS Number	Section IV.B.1	
SF-424 lists the required cost sharing or match amount on line 18b.	Section IV.B.2	
SF-424A, Budget Information Form	Section IV.B.2	
Budget Narrative (including match)	Section IV.B.2	
Project Narrative	Section IV.B.3	
H-1B Industry Identified or Justification provided for specific H-1B occupation identified.	Appendix A or Data Applicant Provided	
Proof of accreditation of lead applicant (if lead is an IHE)	Section III.A.1	

2. Number of Applications Applicants May Submit

We will consider only one application from each organization. However, the applicant may submit one application as lead applicant and, in addition, may be included as a partner in one or more submitted applications where it is not the lead applicant.

Multiple applications from an organization as lead applicant are not allowed. If we receive multiple applications from the same organization as lead applicant, we will only consider the most recently received application that met the deadline. If the most recent application is disqualified for any reason, we will not replace it with an earlier application.

3. Eligible Participants

a) Participants Eligible to Receive Training

The intent of this FOA is to fund projects that provide apprenticeship training and services to individuals that will gain the skills and competencies required to enter middle- and high-skilled jobs along a career pathway in a variety of H-1B industries and occupations. This program will train individuals whose employment status at the time of hire, and prior to enrollment in an apprenticeship program, are unemployed workers, underemployed workers, incumbent workers, and workers currently employed, including transitioning military personnel.

All participants must be 17 years of age or older and not currently enrolled in secondary school within a local educational agency. Training must result in advancement of an individual's skills along a career pathway into middle- and high-skilled occupations in H-1B occupations and industries.

Among the individuals eligible to receive apprenticeship training, those of particular interest include veterans, military spouses, transitioning service members, and underrepresented populations in apprenticeships, including women, people of color, and ex-offenders. Applicants are also strongly encouraged to include individuals who are not traditionally represented in apprenticeship programs and H-1B industries.

To facilitate the inclusion of lower skilled and disadvantaged workers, applicants may serve individuals who are lower skilled, without the necessary skills and competencies to be in middle- and high-skilled jobs, as long as the program provides the skills necessary for individuals to enter a middle- to high-skilled job, or a job along a career pathway in H-1B industries or occupations, upon completion of an apprenticeship program. The apprenticeship program must include components that will assist those who do not have particular educational prerequisites and/or experience.

For the purposes of this FOA, the following definitions apply:

- 1) Unemployed workers: An unemployed worker is an individual who is without a job, is seeking employment, and is available to work.
- 2) Underemployed workers: This term refers to individuals who are not currently connected to a full-time job commensurate with the individual's level of education,

skills, or wage and/or salary earned previously, or who have obtained only episodic, short-term, or part-time employment.

3) Incumbent workers: This term refers to individuals who are employed but need training to upgrade their skills to secure full-time employment, advance in their careers, or retain their current occupations in H-1B occupations and industries. Incumbent workers are workers who typically are employed in lower-skilled, lower-wage, front-line, and/or entry-level positions, and where attaining new skills and competencies could help advance them into middle- and high-skilled jobs with their current employer. This definition includes newly hired workers and workers whose hours have been reduced and/or earnings have declined. The training provided to incumbent workers is developed with an employer or employer association.

4) Workers Currently Employed: This term refers to individuals who are employed, or who are self-employed, and would like to transition their employment to a new job in an H-1B industry or occupation; and whose apprenticeship is with an employer that is different from their previous employer prior to enrollment in the apprenticeship program. Employed workers differ from incumbent workers in that, in the case of an incumbent worker, the employer of record is the same both prior to, and after, the worker's enrollment in the apprenticeship program.

b) Veterans' Priority for Participants

38 U.S.C. 4215 requires grantees to provide priority of service to veterans and spouses of certain veterans for the receipt of employment, training, and placement services in any job training program directly funded, in whole or in part, by DOL. The regulations implementing this priority of service are at 20 CFR Part 1010. In circumstances where a grant recipient must choose between two qualified candidates for a service, one of whom is a veteran or eligible spouse, the veterans' priority of service provisions require that the grant recipient give the veteran or eligible spouse priority of service by first providing him or her that service. To obtain priority of service, a veteran or spouse must meet the program's eligibility requirements. Grantees must comply with DOL guidance on veterans' priority. ETA's Training and Employment Guidance Letter (TEGL) No. 10-09 (issued November 10, 2009) provides guidance on implementing priority of service for veterans and eligible spouses in all qualified job training programs funded in whole or in part by DOL. TEGL No. 10-09 is available at https://wdr.doleta.gov/directives/corr_doc.cfm?DOCN=2816.

IV. APPLICATION AND SUBMISSION INFORMATION

A. HOW TO OBTAIN AN APPLICATION PACKAGE

This FOA, found at www.Grants.gov and https://www.doleta.gov/grants/find_grants.cfm, contains all of the information and links to forms needed to apply for grant funding.

B. CONTENT AND FORM OF APPLICATION SUBMISSION

Applications submitted in response to this FOA must consist of four separate and distinct parts:

1. The SF-424 “Application for Federal Assistance;”
2. Project Budget, composed of the SF-424A and Budget Narrative;
3. Project Narrative; and
4. Attachments to the Project Narrative.

You must ensure that the funding amount requested is consistent across all parts and sub-parts of the application.

1. SF-424, “Application for Federal Assistance”

You must complete the SF-424, “Application for Federal Assistance” available at <https://www.grants.gov/web/grants/forms/sf-424-family.html#sortby=1>.

- In the address field, fill out the nine-digit (plus hyphen) zip code. Nine-digit zip codes can be looked up on the USPS website at <https://tools.usps.com/go/ZipLookupAction!input.action>.
- The SF-424 must clearly identify the applicant and must be signed by an individual with authority to enter into a grant agreement. Upon confirmation of an award, the individual signing the SF-424 on behalf of the applicant is considered the Authorized Representative of the applicant. As stated in block 21 of the SF-424 form, the signature of the Authorized Representative on the SF-424 certifies that the organization is in compliance with the Assurances and Certifications form SF-424B (available at <https://www.grants.gov/web/grants/forms/sf-424-family.html#sortby=1>). You do not need to submit the SF-424B with the application.

a) Requirement for DUNS Number

All applicants for Federal grant and funding opportunities must have a DUNS number, and must supply their DUNS Number on the SF-424. The DUNS Number is a nine-digit identification number that uniquely identifies business entities. If you do not have a DUNS Number, you can get one for free through the D&B website: <https://fedgov.dnb.com/webform/displayHomePage.do>.

Grant recipients authorized to make subawards must meet these requirements related to DUNS Numbers:

- Grant recipients must notify potential subawardees that no entity may receive a subaward from you unless the entity has provided its DUNS number to you.
- Grant recipients may not make a subaward to an entity unless the entity has provided its DUNS number to you.

(See, Appendix A to 2 CFR Section 25.)

b) Requirement for Registration with SAM

Applicants must register with the System for Award Management (SAM) before submitting an application. Find instructions for registering with SAM at <https://www.sam.gov>.

A recipient must maintain an active SAM registration with current information at all times during which it has an active Federal award or an application under consideration. To remain registered in the SAM database after the initial registration, the applicant is required to review and update the registration at least every 12 months from the date of initial registration or subsequently update its information in the SAM database to ensure it is current, accurate, and complete. For purposes of this paragraph, the applicant is the entity that meets the eligibility criteria and has the legal authority to apply and to receive the award. If an applicant has not fully complied with these requirements by the time the Grant Officer is ready to make a Federal award, the Grant Officer may determine that the applicant is not qualified to receive a Federal award and use that determination as a basis for making a Federal award to another applicant.

2. Project Budget

You must complete the SF-424A Budget Information Form (available at: <https://www.grants.gov/web/grants/forms/sf-424-family.html#sortBy=1>). In preparing the Budget Information Form, you must provide a concise narrative explanation to support the budget request, explained in detail below.

Budget Narrative: The Budget Narrative must provide a description of costs associated with each line item on the SF-424A. It must also include a section on the required match with a complete description of projected match, the source and how it will be spent on the project.

The Budget Narrative should also include a section describing any leveraged resources provided (as applicable) to support grant activities. Leveraged resources are all resources, both cash and in-kind in excess of the award and the required 45 percent match contribution. Valuation of leveraged resources follows the same requirements as match. Applicants are encouraged to leverage resources to increase stakeholder investment in the project and broaden the impact of the project itself.

Each category should include the total cost for the period of performance. Use the following guidance for preparing the Budget Narrative.

Personnel: List all staff positions by title (both current and proposed) including the roles and responsibilities. For each position give the annual salary, the percentage of time devoted to the project and the amount of each position's salary funded by the grant.

Fringe Benefits: Provide a breakdown of the amounts and percentages that comprise fringe benefit costs such as health insurance, FICA, retirement, etc.

Travel: For grantee staff only, specify the purpose, number of staff traveling, mileage, per diem, estimated number of in-state and out-of-state trips, and other costs for each type of travel.

Equipment: Identify each item of equipment you expect to purchase which has an estimated acquisition cost of \$5,000 or more per unit (or if your capitalization level is less than \$5,000, use your capitalization level) and a useful lifetime of more than one year (see 2 CFR 200.33 for the definition of Equipment). List the item, quantity, and the unit cost per item.

Items with a unit cost of less than \$5,000 are supplies, not "equipment". In general, we do not permit the purchase of equipment during the last funded year of the grant.

Supplies: Identify categories of supplies (e.g. office supplies) in the detailed budget and list the item, quantity, and the unit cost per item. Supplies include all tangible personal property other than "equipment" (see 2 CFR 200.94 for the definition of Supplies).

Contractual: Under the Contractual line item, delineate contracts and subawards separately. Contracts are defined according to 2 CFR 200.22 as a legal instrument by which a non-Federal entity purchases property or services needed to carry out the project or program under a Federal award. A subaward, defined by 2 CFR 200.92, means an award provided by a pass-through entity to a subrecipient for the subrecipient to carry out part of a Federal award received by the pass-through entity. It does not include payments to a contractor or payments to an individual that is a beneficiary of a Federal program.

For each proposed contract and subaward, specify the purpose and activities to be provided, and the estimated cost.

Construction: Construction costs are not allowed and this line must be left as zero. Minor alterations to adjust an existing space for grant activities (such as a classroom alteration) may be allowable. We do not consider this as construction and you must show the costs on other appropriate lines such as Contractual.

Other: Provide clear and specific detail, including costs, for each item so that we are able to determine whether the costs are necessary, reasonable and allocable. List any item, such as stipends or incentives, not covered elsewhere here.

Indirect Costs: If you include an amount for indirect costs (through a Negotiated Indirect Cost Rate Agreement or De Minimis) on the SF-424A budget form, then include one of the following:

a) If you have a Negotiated Indirect Cost Rate Agreement (NICRA), provide an explanation of how the indirect costs are calculated. This explanation should include which portion of each line item, along with the associated costs, are included in your cost allocation base. Also, provide a current version of the NICRA.

Or

b) If you intend to claim indirect costs using the 10 percent de minimis rate, please confirm that your organization meets the requirements as described in 2 CFR 200.414(f). Clearly state that your organization has never received a Negotiated Indirect Cost Rate Agreement (NICRA), and your organization is not one described in Appendix VII of 2 CFR 200, paragraph (D)(1)(b).

Applicants choosing to claim indirect costs using the de minimis rate must use Modified Total Direct Costs (see 2 CFR 200.68 below for definition) as their cost allocation base. Provide an explanation of which portion of each line item, along with the associated costs, are included in your cost allocation base. Note that there are various items not included in the calculation of Modified Total Direct Costs. See below the definitions to assist you in your calculation.

2 CFR 200.68 Modified Total Direct Cost (MTDC) means all direct salaries and wages, applicable fringe benefits, materials and supplies, services, travel, and up to the first \$25,000 of each subaward (regardless of the period of performance of the subawards under the award). MTDC excludes equipment, capital expenditures, charges for patient care, rental costs, tuition remission, scholarships and fellowships, participant support costs and the portion of each subaward in excess of \$25,000. Other items may only be excluded when necessary to avoid a serious inequity in the distribution of indirect costs, and with the approval of the cognizant agency for indirect costs.

The definition of MTDC in 2 CFR 200.68 no longer allows for any sub-contracts to be included in the calculation. You will also note that participant support costs are not included in modified total direct cost. Participant support costs are defined below.

2 CFR 200.75 Participant Support Cost means direct costs for items such as stipends or subsistence allowances, travel allowances, and registration fees paid to or on behalf of

participants or trainees (but not employees) in connection with conferences, or training projects.

See Section IV.B.4. Attachments to the Project Narrative and Section IV.E.1. Indirect Costs for more information. Additionally, the following link contains information regarding the negotiation of Indirect Cost Rates at DOL: <https://www.dol.gov/oasam/boc/dcd/index.htm>.

Note that the SF-424, SF-424A, and Budget Narrative must include the entire Federal grant amount requested (not just one year). Applicants must also show cost sharing or match on the SF-424 (line 18b), SF-424A, and Budget Narrative.

Do not show leveraged resources on the SF-424 and SF-424A. You should describe leveraged resources in the Budget Narrative.

Applicants should list the same requested Federal grant amount on the SF-424, SF-424A, and Budget Narrative. If minor inconsistencies are found between the budget amounts specified on the SF-424, SF-424A, and the Budget Narrative, ETA will consider the SF-424 the official funding amount requested. However, if the amount specified on the SF-424 would render the application nonresponsive, the Grant Officer will use his or her discretion to determine whether the intended funding request (and match if applicable) is within the responsive range.

3. Project Narrative

The Project Narrative must demonstrate your capability to implement the grant project in accordance with the provisions of this Announcement. It provides a comprehensive framework and description of all aspects of the proposed project. It must be succinct, self-explanatory, and well organized so that reviewers can understand the proposed project.

The Project Narrative is limited to 25 double-spaced, single-sided, 8.5 x 11 inch pages with Times New Roman 12-point text font and 1-inch margins. You must number the Project Narrative beginning with page number 1.

We will not read or consider any materials beyond the specified page limit in the application review process.

The following instructions provide all of the information needed to complete the Project Narrative. Carefully read and consider each section, and include all required information in your Project Narrative. The agency will evaluate the Project Narrative using the evaluation criteria identified in Section V.A. Criteria. You must use the same section headers identified below for each section of the Project Narrative:

a) Statement of Need (12 points)

Scoring under this criterion will be based on the extent to which the discussion of the following factors is clear, logical, and an accurate interpretation of labor market data. All data sources must include citations that provide information that enables the identification and verification of data.

1) Target Industry and Employer Demand (6 points)

- i. Clear identification and complete explanation of the H-1B industry(ies) and/or occupation(s) targeted by the proposed project. Applicants must select one of two options provided in Section I.C. Target Industries, and provide a clear explanation that these are middle-to high-skilled occupations; (2 points)
- ii. Detailed and convincingly supported description of the current and future projected demand for employment in the selected H-1B industry(ies) or occupation(s), including how the demand coincides with the project. Applicants must cite the source for the projected demand, such as Bureau of Labor Statistics or other DOL sources, state workforce agency sources, employers, or other written labor market information provided by employers or other reliable/credible knowledgeable parties. Applicants must provide strong evidence with citations that identifies the average current wages offered for the selected industry(ies) and occupation(s), based on national, state, or local data. To the extent possible, data should reflect the proposed geographic scope; and (2 points)
- iii. For projects focused on cybersecurity or AI, a detailed description of these proposed apprenticeship programs and explanation of how they meet current demand. (2 points)

2) Populations Served (4 points)

- i. Clear identification of the specific population(s) to be served through the project, including demographic characteristics, skill levels, and a description of how the targeted population(s) to be served in the project will meet the requirements of this FOA as identified in Section III.C.3. Eligible Participants; (2 points)
- ii. Clear statement and plausible plan for how the project will increase access to apprenticeships for all Americans, particularly veterans, military spouses, and transitioning service members, and underrepresented populations in apprenticeship, including women, people of color, and ex-offenders. (2 points)

3) Priority Consideration: Opportunity Zones (2 points)

- i. Identify that at least one census tract within an applicant's physical service area is designated as a qualified Opportunity Zone. (2 points)

b) Expected Outcomes and Outputs (38 points)

Applicants must clearly identify outcomes and outputs that the project will achieve as a direct result of the proposed project. Outcomes are measurable characteristics that directly result from the implementation of specific project design activities. Outputs are tangible products or services that result from the project.

Outcomes proposed must be consistent with the chart titled “Figure 1: Minimum Goals for Grant Participants Served During the Grant Period Based on Funding Request” in Section II.A. Applicants must provide a table that clearly identifies the outcomes and the outputs (listed directly below) that will result from your project. This table will include annual target outcomes that will be used for the purposes of technical assistance. In addition, applicants must describe in a narrative format how these outcomes and outputs align with their project goals.

The performance table must be submitted as a separate attachment and does not count against the page limit of the Project Narrative (see Section IV.B.4. Attachments to the Project Narrative, as well as Appendix E, Suggested Performance Outcome Measures Table).

1. Apprentice Training and Employment Performance Outcomes (20 points)

- i. Applicants must include comprehensive numerical outcome projections for each of the six outcome measures identified below and defined in Appendix D. Applicants must provide raw numbers for each of the target outcome measures; otherwise, they will not receive full points. Percentages, percent increases, or other types of data projections are not acceptable. (6 points)
 - 1) Total participants served. *This includes all individuals who receive a grant-funded service (grant funds or match fund), after they are determined eligible to be served by the program;*
 - 2) Total participants enrolled in education/training activities;
 - 3) Total participants who complete education/training activities;
 - 4) Total participants who complete education/training activities and receive a degree, or other type of credential;
 - 5) Total number of participants who obtain employment; and
 - 6) Total number of incumbent worker participants who complete training activities and advance into a new position.

The targets must be provided for each year of the grant, as well as for the total grant period. Applicants must present their information in a performance outcomes table (see Appendix D for a sample format) to be included as an attachment to the Project Narrative.

- ii. Comprehensive description of an effective outreach, recruitment and enrollment strategy for engaging the target population(s), to recruit the requisite number of apprentices. This description must include clear identification of partner organizations identified in Section III.A.3. Apprenticeship Partnership, which will support this effort, and the process to ensure collaboration between the applicant, applicant's outreach partners, and other relevant partners in these activities. This must include a thorough description of the assessment process that will be used to determine if individuals are an appropriate fit for the apprenticeship program; (4 points)
- iii. Thorough description of how the proposed skills instruction/training activities for the apprenticeship program will support the achievement of the proposed training outcomes; (4 points)
- iv. Clear and convincing demonstration that apprentices will achieve the necessary industry-recognized credential(s), including degree(s), to qualify for placement into middle- to high-skilled jobs upon completion of the grant program. (4 points)
- v. Thorough and convincing description of how the proposed skills instruction/training activities of the apprenticeship program are appropriate for the target populations, as described in Section III.C.3. Eligible Participants, to be served and how the strategies will address skills, training gaps, and other needs of apprentices identified in the Statement of Need; and (2 points)

2. Expanding Apprenticeship Programs Outputs (14 points)

- i. Applicants are required to provide feasible targets for the following performance metrics to track the efforts of developing new apprenticeship programs, expanding existing Registered Apprenticeship Programs, or taking existing apprenticeship programs to scale in the geographic area proposed. (6 points)
 - 1) Total number of all newly created apprenticeship programs, including newly created Registered Apprenticeship Programs.
 - 2) Total number of existing apprenticeship programs, including Registered Apprenticeship Programs, that are expanded, (e.g., new industries, occupations or service areas, or increased number of apprentices registered).
 - 3) Total number of employers engaged (i.e., those employers that adopt apprenticeship programs as a result of your grant project).
- ii. Thorough description of comprehensive approaches to develop an apprenticeship program(s) that have the characteristics of a high-quality apprenticeship program, as discussed in Section I.A. Program Purpose; and (4 points)

- iii. Thorough description of a plausible plan to increase the demand for apprentices among a broad network of employers in H-1B occupations and industries, including small- and medium-sized employers. This plan must include a thorough and convincing explanation of the methods used to promote the adoption of apprenticeship models and how to assist employers of all sizes in adopting them. This includes a description of how the project will engage partners that can help reduce the burden on smaller employers, such as by working with small employers to aggregate their training needs, coordinate with training providers, and manage the work-based learning component. This plan must also describe how the project will engage partners to assist the lead applicant's employer partners in implementing their programs, attracting and screening candidates, and interacting with local education providers. (4 points)

3. Feasibility of Proposed Outcomes (4 points)

- i. A thorough explanation of how the outcome projections for both apprenticeship training and expanding apprenticeship programs are feasible and appropriate numerical targets for the project design—specifically, detailing how the targets were derived and how the targets fit into the overall timeline of grant implementation.

c) Project Design (36 points)

Scoring under this criterion is based on a clear and complete identification of the proposed methods that the project will use to address the stated outcomes and outputs. Applicants must: Outline a plan of action that describes the scope and detail of how the project will accomplish the proposed work and include timelines for completion of work; account for all functions or activities identified in the application; cite factors that might accelerate or decelerate the work and state the reason for taking the proposed approach rather than other approaches; and identify any potential barriers and describe how the project will be able to overcome those barriers.

a. Apprenticeship Partnership (12 points)

Scoring under this criterion is based on how the apprenticeship partnership will directly engage employers within a specified industry sector and/or occupation to design work-based learning opportunities that align with and respond to employer hiring needs and career advancement opportunities, including how other partners are involved in the project as proposed.

- i. Comprehensive description of the apprenticeship partnership, including identifying all participating partners, particularly those required in the grant,

describing their roles, their match amount, and thoroughly and convincingly explaining how each partner supports the overall partnership. (4 points)

- ii. Clear and convincing explanation and demonstration that the private sector partner(s) represent(s) a significant presence in an industry sector or focused on a specific occupation, and how the entity(ies) will be involved in the project, including its specific role(s) in the activities proposed in Section IV.B.3. Project Narrative (2 points);
- iii. Clear description of how the institutions of higher education will support the apprenticeship program in specific service areas; (2 points) and
- iv. Documentation of the active roles of all required and optional partners identified in Section III.A.3. Apprenticeship Partnership. This includes a clear and thorough description of the capacity and role of all partners involved, including in expanding an existing apprenticeship program on a local/regional, statewide, or national scale, deploying a new apprenticeship program, and/or providing outreach and recruitment services, training activities, supportive services, and other services. Such documentation must be included in the form of attached partnership agreements, letters, or other documentation (as described in Sections IV.B.4. Attachments to the Project Narrative). Failure to provide documentation for each required partner and optional partners identified in Section III.A.3. Apprenticeship Partnership will cause the applicant to receive zero points for this rating factor. (4 points)

b. Apprenticeship Program Training Design (20 points)

Scoring under this criterion is based on how the skills instruction and training activities in the proposed apprenticeship program will be implemented. This includes educational or instructional components and paid, work-based learning components; and may also include supportive services designed to assist apprentices to participate and successfully complete the apprenticeship program.

- i. Comprehensive narrative description that describes and convincingly demonstrates how the proposed apprenticeship program(s) meet(s) the minimum requirements of an apprenticeship program(s) that have the characteristics of a high-quality apprenticeship program, as discussed above and in Section I.A. Program Purpose as described in Section I.E. Program Activities/Allowable Activities. These requirements include a paid, work component, work-based learning and mentorship component, an educational or instructional component an industry-recognized credentials earned, including competency-based credentials, policies and procedures for safety, supervision, and equal employment

opportunity. The applicant must also describe how the program will demonstrate quality assurance; (6 points)

- ii. Detailed and convincing explanation of how existing curricula will be adjusted to meet the needs of employer partners; how apprenticeship training activities will be appropriately tailored for online or virtual application to meet the needs of apprentices; and how standardized or centralized programs will be used to train mentors and trainers who may be experts in their craft, but have limited experience in mentoring novice workers or teaching others; (4 points)
- iii. Clear description of a plausible strategic plan to deploy the proposed apprenticeship program within an H-1B industry(ies) or occupation(s) as described in Section I.C. Target Industries to the proposed geographic scope as identified in Section I.D. Geographic Scope. Applicants that propose a national scope must provide an explanation of how those programs will rapidly ramp up and ultimately reach to proposed scale. This must include a clear identification of proposed local/regional, statewide, or national service area(s) such as economic region(s), cities, counties, and states, and an explanation that convincingly demonstrates how the project will be implemented at the proposed scale during the grant; (2 points)
- iv. Clear and convincing demonstration that these apprenticeship activities will lead to middle- to high-skilled jobs. This may include training services that will be used to prepare the targeted population(s) for apprenticeships; (2 points)
- v. Detailed explanation of a workable process or system for reviewing, approving, and collecting data from apprenticeship programs to assess the quality of the training standards, materials, and programs, and to inform continuous improvement; and (2 points)
- vi. Clear description of the proposed supportive service strategy(ies) for apprentices identified in Section III.C.3. Eligible Participants, including a thorough description of the specific services, such as childcare, transportation, equipment, needs-based payments, career counseling services, conflict management counseling, financial literacy education, accommodations for individuals with disabilities, and other supportive services. The description must provide a clear plan detailing how these services will be effectively provided and must convincingly demonstrate how these services will support apprentices in successfully remaining in and completing the apprenticeship training and obtaining employment in middle- and high-skilled jobs. (2 points)

- vii. Clear and convincing demonstration that apprentices will achieve the necessary degree(s) and/or industry-recognized credential(s) to qualify for placement into middle- to high-skilled jobs upon completion of the grant program; (2 points)

c. Project Work Plan (4 points)

Scoring under this criterion is based on a clear and complete identification of project goals, milestones, key activities, and key partners of the proposed apprenticeship program.

- i. Narrative description that clearly identifies the overall project goals and milestones for taking apprenticeships to scale, which will result from the apprenticeship project. The narrative description must demonstrate that milestones are reasonable based on the project design. To that end, the work plan must clearly describe short-term, mid-term, and long-term milestones that capture the results of taking apprenticeships to national scale, and employment/training activities. The work plan must include all of the following (2 points):
 - Project goals, which are the overarching achievements that will be pursued;
 - Milestones, which are key markers of grant progress; these are typically expressed in the form of an action or event marking a significant change or stage in development;
 - Key Activities, including timeframes for development or modification of apprenticeship programs, deployment of apprenticeship programs on a national scale, and/or enrollment in apprenticeship training; and
 - Key partner(s) identified for key activities.
- ii. Applicants must present the information described in their narrative in a work plan table format that provides an overview of activities, timelines, and key milestones. (See Appendix F for an example.) (2 points).

d) Organizational, Administrative, and Fiscal Capacity (6 points)

a. Capacity of Lead Applicant, Partnership Structure, and Administrative Controls and Systems (4 points)

- i. Detailed description demonstrating the lead applicant's capacity to effectively manage each component of the program, including a project management plan and a communications plan for efficient and effective management of the project with all partners and staff; and demonstrating its capacity to establish effective

procurement processes, systems, and procedures and those of any partners who will be providing any services or conducting any activities under the grant (if applicable); (2 points) and

- ii. Detailed organizational chart that identifies the lead applicant, apprenticeship partnerships, and other proposed partners. The chart must describe the structure of the relationships of all partners involved in the project. The chart must also identify the proposed project's staffing plan to illustrate that partners have the capacity to support the lead applicant to carry out the proposed project. The staffing plan must describe the qualifications and experience of all executive and administrative staff, as well as other personnel such as board members, advisors, and consultants, to fulfill the needs and requirements of the proposed project. Such qualifications and experience must demonstrate the ability to manage a strategic partnership, including fiscal and administrative management, outreach, and promotion. (2 points)

b. Financial, Data Collection, and Performance Reporting Systems (2 Points)

Applicants must agree to meet DOL reporting requirements and provide individual record-level data that would be made available for evaluation and national reporting purposes. Please refer to Section VI.C. for a description of the reporting requirements for projects funded under this grant program.

- i. Comprehensive description of the existing or planned systems and processes that the lead applicant will use to provide timely and accurate financial and participant-level performance reporting, including the process for tracking participant-level data on participant characteristics, services, activities, and employment outcomes of apprentices served through the project to report to the Department during the life of the grant. In addition, the description must detail how these systems will be used to regularly assess progress towards the identified performance goals and that rigorous performance reporting will be taken into account in staffing and budgeting plans. (2 points)

e) Past Performance – Programmatic Capability (4 points)

Applicants will receive points based on past performance data. Applicants must use the information below and provide the applicable past performance information.

- i. Full description of the lead applicant's prior experience in the development of apprenticeships or capacity to establish or expand apprenticeships within a regional, statewide or national scope during the grant period. This could include evidence of existing partnerships, prior experience in taking apprenticeship

programs to scale, and the number of apprentices placed in prior programs; (2 points) and

- ii. Demonstration that partners have experience in deploying apprenticeships; in developing work-based learning programs, internships, mentorships, externships, or clinical placements within the proposed industry; and in enrolling participants in apprenticeship programs, including securing employment placements, and/or wage increases. (2 points)

f) Budget and Budget Justification (4 points)

Please see Section IV.B.2. Project Budget for information on requirements related to the budget and budget justification. The Budget and Budget Justification do not count against the page limit requirements for the Project Narrative.

a. Budget Narrative (2 points)

- i. Detailed explanation of how the budget is reasonable and feasible based on the activities outlined in the Project Narrative, how the proposed expenditures will support the expansion of apprenticeship opportunities for both employers and individuals, and whether key personnel have adequate time devoted to the project to achieve project results (2 points).

b. Matching Funds (2 points)

- i. Within the Budget Narrative, a detailed description of the applicant's plan to match with external resources 45 percent of total requested grant funds. The description must identify how the matching funds will support grant activities, including how the matching funds will meet the goals for the numbers of apprentices to be served and of newly created and/or expanded apprenticeships (see Section II.A. Award Type and Amount), as well as the other outcomes and outputs proposed in response to Section IV.B.3b) Expected Outcomes and Outputs. This description should include the amount of cash and/or in-kind support from private sector investment funds (e.g., training investment funds, social impact bonds, industry association or labor organization funds, etc.) (2 points).

4. Attachments to the Project Narrative

In addition to the Project Narrative, you must submit attachments. All attachments must be clearly labeled. We will only exclude those attachments listed below from the page limit. The Budget and Budget Justification do not count against the page limit requirements for the Project Narrative.

You must not include additional materials such as resumés or general letters of support. You must submit your application in one package because documents received separately will be tracked separately and will not be attached to the application for review.

Save all files with descriptive file names of 50 characters or less and only use standard characters in file names: A-Z, a-z, 0-9, and underscore (_). File names may not include special characters (e.g. &, -, *, %, /, #), periods (.), blank spaces or accent marks, and must be unique (i.e., no other attachment may have the same file name). You may use an underscore (example: My_Attached_File.pdf) to separate a file name.

Required Attachments

a. **Abstract:** You must submit an up to two-page abstract summarizing the proposed project, including, but not limited to, the scope of the project and proposed outcomes. Omission of the abstract will not result in your application being screened out; however, the lack of the required information in the abstract may impact scoring. See Section III.C.1. Application Screening Criteria for a list of items that will result in the screening out of your application. Include the following in the abstract (see Appendix F for suggested template):

1. Lead applicant organization's name;
2. Lead applicant entity type;
 - a. If applying as an IHE representing a consortium of IHEs, provide the names of IHE consortium members.
3. Lead applicant location (city/state);
4. Organization names of required partners;
 - a. Employers: *List of at least three employer partners if serving local/regional, or statewide geographic scope, or list of at least five employer partners if serving national geographic scope*
- b. Institution(s) of Higher Education;
5. Organization names and entity type of optional partners, including the credentialing entity issuing exam and final credential(s);
6. Geographic scope (project service areas);
 - a. Identify scope: local/regional, statewide, or national
 - b. Identify specific location where grant services will be provided
 - c. Provide the census tract number(s) in an applicant's physical service area designated as a qualified Opportunity Zone, if applicable;
7. Total funding requested;
8. Total matched funds;
 - a. *Must be 45 percent of requested funding amount*
9. Project title/name;
10. Proposed number of apprentices to be served;

- a. *Must align with Minimum Figure 1 chart “Goals for Grant Apprentices Served During the Grant Period, Based on Funding Request”*

11. Summary of apprenticeship program activities;
12. Targeted population(s) to be served;
13. Targeted H-1B industry sector(s) and/or;
14. Targeted H-1B occupations(s);
15. Credential(s) to be awarded;
16. Indicate whether the project includes an *existing* apprenticeship program, OR *new* apprenticeship program, or both;
17. Indicate whether the project focuses on occupations in cybersecurity or artificial intelligence; and
18. Public contact information

The Abstract is limited to two, double-spaced, single-sided 8.5x11 inch pages with 12 point text font and 1-inch margins.

When submitting in grants.gov, this document must be uploaded as an attachment to the application package and specifically labeled “Abstract.”

- b. **Proof of Accreditation:** A lead applicant that is an IHE must submit documentation as an attachment verifying that it is an institution of higher education accredited by an agency that has been recognized by the U.S. Department of Education (see Section III.A.1. Eligible Lead Applicant Entities). If the lead applicant does not submit proof of accreditation, the application will be considered incomplete and non-responsive, and it will not move forward through the merit review process.

5. Requested Attachments

We request the following attachments, but their omission will not cause us to screen out the application. Furthermore, the omission of the attachment will impact scoring unless otherwise noted.

- a. **Documentation of Partnership Commitment:** You will be scored on the documentation showing representation from at least one senior-level representative from each of the required entities, as described in Section III.A.3. Apprenticeship Partnership. This may include signed and dated Letters of Commitment or Memoranda of Understanding between the applicant and all required and optional partner organizations and/or sub-grantees that propose to provide services to support the program model and lead to the identified outcomes.

When submitting in grants.gov, these letters must be uploaded as an attachment to the application package and specifically labeled “Letters of Commitment.”

- b. **Documentation of Commitment to Participate in Evaluation, if selected:** You may be required to participate in a Federal evaluation of the Apprenticeships: Closing the Skills Gaps grant program. The evaluation may include an experimental impact evaluation where eligible participants will be randomly assigned to the program or to a control group that does not receive the program. You must submit a statement of commitment to participate in a national evaluation initiated by DOL, for the applicant and all partners, including employers or regional industry associations. The evaluation may involve making records on participants, employers, and funding available; providing access to program and partner personnel and participants; facilitating random assignment by increased recruitment of potential participants; and following evaluation procedures as specified by the evaluator(s) under the direction of DOL ETA and the Chief Evaluation Office, including after the period of operation. This attachment does not impact the scoring of the application. Applicants that do not submit this attachment and are selected for grant award will not receive their grant funds unless this attachment is submitted as a condition of grant award funding.
- c. **Project Work Plan:** As described in Section IV.B.3.a(3)d, Project Work Plan. See Template in **Appendix F**. You will be scored on the completion and detail of the Project Work Plan.
- d. **Performance Outcomes Table:** You will be scored on the completion and detail of the projected performance outcomes information in a performance outcomes table. For an example, see Appendix D, Performance Outcome Measures Table.
- e. **Indirect Cost Rate Agreement:** If you are requesting indirect costs based on a Negotiated Indirect Cost Rate Agreement approved by your Federal Cognizant Agency, then attach the most recently approved Agreement. (For more information, see Section IV.B.2. Project Budget and Section IV.E.1. Indirect Costs.) This attachment does not impact scoring of the application.
- When submitting in grants.gov, this document must be uploaded as an attachment to the application package and specifically labeled “NICRA.”
- f. **Financial System Assessment Information:** All applicants requested to submit must submit Funding Opportunity Announcement Financial System Assessment Information. See Section V.B.2. Risk Review Process for a sample template and additional instructions. This attachment does not impact the scoring of the application.

C. SUBMISSION DATE, TIME, PROCESS AND ADDRESS

We will accept applications under this Announcement until **September 24, 2019**. We must receive your application either electronically on <https://www.grants.gov> or in hard copy by mail or in hard copy by hand delivery (*including overnight delivery*) **no later than 4:00:00 p.m. Eastern Time on the closing date.**

Applicants are encouraged to submit their application before the closing date to ensure that the risk of late receipt of the application is minimized. We will not review applications received after 4:00:00 p.m. Eastern Time on the closing date. We will not accept applications sent by e-mail, telegram, or facsimile (FAX).

1. Hardcopy Submission

All applications submitted by mail or overnight delivery submissions **must be received** at the designated place by the specified closing date and time. Applicants submitting applications in hard copy by mail or overnight delivery must submit a “copy-ready” version free of bindings, staples or protruding tabs to ease in the reproduction of the application by DOL. Applicants submitting applications in hard copy must also include in the hardcopy submission an identical electronic copy of the application on compact disc (CD) or flash drive. If we identify discrepancies between the hardcopy submission and CD/flash drive copy, we will consider the application on the CD/flash drive as the official submission for evaluation purposes.

If an application is physically submitted by both hard copy and through <https://www.grants.gov>, a letter must accompany the hardcopy application stating which application to review. If no letter accompanies the hard copy, we will review the copy submitted through <https://www.grants.gov>.

We will grant no exceptions to the mailing and delivery requirements set forth in this notice. Further, we will not accept documents submitted separately from the application, before or after the deadline, as part of the application.

Address mailed applications to the:

U.S. Department of Labor
Employment and Training Administration
Office of Grants Management
Attention: Brinda Ruggles, Grant Officer
Reference FOA-ETA-19-09
200 Constitution Avenue, NW, Room N4716
Washington, DC 20210

Please note that mail decontamination procedures may delay mail delivery in the Washington DC area. We will receive hand-delivered applications at the above address at the **3rd Street Visitor Entrance**. All overnight delivery submissions will be considered to be hand-delivered and must be received at the designated place by the specified closing date and time.

2. Electronic Submission through Grants.gov

Applicants submitting applications through Grants.gov must ensure successful submission **no later than 4:00:00 p.m. Eastern Time on the closing date.** Grants.gov will subsequently validate the application.

The process can be complicated and time-consuming. You are strongly advised to initiate the process as soon as possible and to plan for time to resolve technical problems. Note that validation does not mean that your application has been accepted as complete or has been accepted for review by the agency. Rather, grants.gov only verifies the submission of certain parts of an application.

a. How to Register to Apply through Grants.gov

Read through the registration process carefully before registering. These steps may take as much as **four weeks** to complete, and this time should be factored into plans for timely electronic submission in order to avoid unexpected delays that could result in the rejection of an application.

Applicants must follow the online instructions for registration at <https://www.grants.gov/web/grants/applicants/organization-registration.html>. We recommend that you prepare the information requested before beginning the registration process. Reviewing and assembling required information before beginning the registration process will alleviate last-minute searches for required information and save time.

An application submitted through Grants.gov constitutes a submission as an electronically signed application. The registration and account creation with Grants.gov, with E-Biz POC approval, establishes an Agency Organizational Representative (AOR). When an application is submitted through Grants.gov, the name of the AOR that submitted the application is inserted into the signature line of the application, serving as the electronic signature. The EBiz POC must authorize the individual who is able to make legally binding commitments on behalf of your organization as the AOR; this step is often missed and it is crucial for valid submissions.

b. How to Submit an Application to DOL via Grants.gov

Grants.gov applicants can apply online using Workspace. Workspace is a shared, online environment where members of a grant team may simultaneously access and edit different webforms within an application. For a complete workspace overview, refer to: <https://www.grants.gov/web/grants/applicants/workspace-overview.html>

For access to complete instructions on how to apply for opportunities, refer to: <https://www.grants.gov/web/grants/applicants/apply-for-grants.html>

When a registered applicant submits an application with Grants.gov, an electronic time stamp is generated within the system when the application is successfully received by Grants.gov. Grants.gov will send the applicant AOR an email acknowledgement of receipt and a tracking number (GRANTXXXXXXXX) with the successful transmission of the application, serving as proof of their timely submission. The applicant will receive two email messages to provide the status of the application's progress through the system.

- The first email will contain a tracking number and will confirm receipt of the application by Grants.gov.
- The second email will indicate the application has either been successfully validated or has been rejected due to errors.

Grants.gov will **reject applications if the applicant's registration in SAM is expired. Only applications that have been successfully submitted by the deadline and later successfully validated will be considered.** It is your sole responsibility to ensure a timely submission. While it is not required that an application be successfully validated before the deadline for submission, it is prudent to reserve time before the deadline in case it is necessary to resubmit an application that has not been successfully validated. Therefore, enough time should be allotted for submission (24-48 hours) and, if applicable, additional time to address errors and receive validation upon resubmission (an additional two business days for each ensuing submission). It is important to note that if enough time is not allotted and a rejection notice is received after the due date and time, DOL will not consider the application.

To ensure consideration, the components of the application must be saved as .doc, .docx, .xls, .xlsx, .rtf or .pdf files. If submitted in any other format, the applicant bears the risk that compatibility or other issues will prevent DOL from considering the application. We will attempt to open the document, but will not take any additional measures in the event of problems with opening.

We strongly advise applicants to use the various tools and documents, including FAQs, which are available on the “Applicant Resources” page at <https://www.grants.gov/web/grants/applicants/applicant-faqs.html>.

We encourage new prospective applicants to view the online tutorial, “Grant Applications 101: A Plain English Guide to ETA Competitive Grants,” available through WorkforceGPS at: <https://strategies.workforcegps.org/resources/2014/08/11/16/32/applying-for-eta-competitive-grants-a-web-based-toolkit-for-prospective-applicants-438?p=1>.

To receive updated information about critical issues, new tips for users, and other time-sensitive updates as information is available, you may subscribe to “Grants.gov Updates” at <https://www.grants.gov/web/grants/manage-subscriptions.html>.

If you encounter a problem with Grants.gov and do not find an answer in any of the other resources,

- **call** 1-800-518-4726 or 606-545-5035 to speak to a Customer Support Representative or
- **email** support@grants.gov.

The Grants.gov Contact Center is open 24 hours a day, seven days a week. However, it is closed on Federal holidays. If you are experiencing difficulties with your submission, it is best to call the Grants.gov Support Center and get a ticket number.

3. Late Applications

For applications submitted on Grants.gov, we will consider only applications successfully submitted no later than 4:00:00 p.m. Eastern Time on the closing date and then successfully validated. You take a significant risk by waiting to the last day to submit through Grants.gov.

We will not consider any hard copy application received after the exact date and time specified for receipt at the office designated in this notice, unless we receive it before awards are made, it was properly addressed, and it was: (a) sent by U.S. Postal Service mail, postmarked not later than the fifth calendar day before the date specified for receipt of applications (e.g., an application required to be received by the 20th of the month must be postmarked by the 15th of that month); or (b) sent by professional overnight delivery service to the addressee not later than one working day before the date specified for receipt of applications. “Postmarked” means a printed, stamped or otherwise placed impression (exclusive of a postage meter machine impression) that is readily identifiable, without further action, as having been supplied or affixed on the date of mailing by an employee of the U.S. Postal Service. Therefore, you should request the postal clerk to

place a legible hand cancellation “bull’s eye” postmark on both the receipt and the package. Failure to adhere to these instructions will be a basis for a determination that the application was not filed timely and will not be considered. Evidence of timely submission by a professional overnight delivery service must be demonstrated by equally reliable evidence created by the delivery service provider indicating the time and place of receipt.

D. INTERGOVERNMENTAL REVIEW

This funding opportunity is not subject to Executive Order 12372, “Intergovernmental Review of Federal Programs.”

E. FUNDING RESTRICTIONS

All proposed project costs must be necessary and reasonable and in accordance with Federal guidelines. Determinations of allowable costs will be made in accordance with the Cost Principles, now found in the Office of Management and Budget’s Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards (Uniform Guidance), codified at 2 CFR Part 200 and at 2 CFR Part 2900 (Uniform Guidance-DOL specific). Compensation, including salaries, must be handled consistent with the Uniform Guidance, including 2 CFR 200.430. Disallowed costs are those charges to a grant that the grantor agency or its representative determines not to be allowed in accordance with the Cost Principles or other conditions contained in the grant. Applicants, whether successful or not, will not be entitled to reimbursement of pre-award costs.

1. Indirect Costs

As specified in the Uniform Guidance Cost Principles, indirect costs are those that have been incurred for common or joint objectives and cannot be readily identified with a particular final cost objective. An indirect cost rate is required when an organization operates under more than one grant or other activity, whether Federally-assisted or not. You have two options to claim reimbursement of indirect costs.

Option 1: You may use a NICRA or Cost Allocation Plan (CAP) supplied by the Federal Cognizant Agency. If you do not have a NICRA/CAP or have a pending NICRA/CAP, and in either case choose to include estimated indirect costs in your budget, at the time of award the Grant Officer will release funds in the amount of 10 percent of salaries and wages to support indirect costs. Within 90 days of award, you are required to submit an acceptable indirect cost proposal or CAP to your Federal Cognizant Agency to obtain a provisional indirect cost rate. (See Section IV.B.2. Project Budget for more information on NICRA submission requirements.)

Option 2: Any organization that has never received a negotiated indirect cost rate, with the exceptions noted at 2 CFR 200.414(f) in the Cost Principles, may elect to charge a de minimis rate of 10 percent of modified total direct costs (see 2 CFR 200.68 for definition), which may be used indefinitely. If you choose this option, this methodology must be used consistently for all Federal awards until such time as you choose to negotiate for an indirect cost rate, which you may apply to do at any time (See 2 CFR 200.414(f) for more information on use of the de minimis rate).

2. Intellectual Property Rights

Pursuant to 2 CFR 2900.13, to ensure that the Federal investment of DOL funds has as broad an impact as possible and to encourage innovation in the development of new learning materials, the grantee will be required to license to the public all work created with the support of the grant under a Creative Commons Attribution 4.0 (CC BY) license. Work that must be licensed under the CC BY includes both new content created with the grant funds and modifications made to pre-existing, grantee-owned content using grant funds.

This license allows subsequent users to copy, distribute, transmit, and adapt the copyrighted Work and requires such users to attribute the Work in the manner specified by the grantee. Notice of the license shall be affixed to the Work. For general information on CC BY, please visit <https://creativecommons.org/licenses/by/4.0>.

Instructions for marking your work with CC BY can be found at https://wiki.creativecommons.org/Marking_your_work_with_a_CC_license.

Questions about CC BY as it applies to this specific funding opportunity should be submitted to the ETA Grants Management Specialist specified in Section VII. Agency Contacts.

Only work that is developed by the recipient in whole or in part with grant funds is required to be licensed under the CC BY license. Pre-existing copyrighted materials licensed to, or purchased by the grantee from third parties, including modifications of such materials, remain subject to the intellectual property rights the grantee receives under the terms of the particular license or purchase. In addition, works created by the grantee without grant funds do not fall under the CC BY licensing requirement.

The purpose of the CC BY licensing requirement is to ensure that materials developed with funds provided by these grants result in work that can be freely reused and improved by others. When purchasing or licensing consumable or reusable materials, the grantee is

expected to respect all applicable Federal laws and regulations, including those pertaining to the copyright and accessibility provisions of the Federal Rehabilitation Act.

Separate from the CC BY license to the public, the Federal Government reserves a paid-up, nonexclusive, and irrevocable license to reproduce, publish, or otherwise use, and to authorize others to use for Federal purposes: i) the copyright in all products developed under the grant, including a subaward or contract under the grant or subaward; and ii) any rights of copyright to which the recipient, subrecipient, or a contractor purchases ownership under an award (including, but not limited to, curricula, training models, technical assistance products, and any related materials). Such uses include, but are not limited to, the right to modify and distribute such products worldwide by any means, electronically or otherwise. The grantee may not use Federal funds to pay any royalty or license fee for use of a copyrighted work, or the cost of acquiring by purchase a copyright in a work, where the Department has a license or rights of free use in such work. If revenues are generated through selling products developed with grant funds, including intellectual property, DOL treats such revenues as program income. Such program income is added to the grant and must be expended for allowable grant activities.

If applicable, the following needs to be on all products developed in whole or in part with grant funds:

“This workforce product was funded by a grant awarded by the U.S. Department of Labor’s Employment and Training Administration. The product was created by the grantee and does not necessarily reflect the official position of the U.S. Department of Labor. The U.S. Department of Labor makes no guarantees, warranties, or assurances of any kind, express or implied, with respect to such information, including any information on linked sites and including, but not limited to, accuracy of the information or its completeness, timeliness, usefulness, adequacy, continued availability, or ownership. This product is copyrighted by the institution that created it.”

3. Grant Recipient Technical Assistance Training

Grantees are required to participate in all ETA training activities related to grantee orientation, financial management and reporting, performance reporting, product dissemination, and other technical assistance training as appropriate during the grant period. These sessions may occur via conference calls, virtual events such as webinars, and in-person meetings. Applicants should budget for at least two staff members to attend up to two in-person events in Washington, D.C. during the life of the grant.

4. Use of Grant Funds for Work-based Learning Components

For the purposes of grants awarded under this FOA, the following will apply:

Organizations may only use grant funds to reimburse a portion of the apprentice’s work-

based learning costs for small employers (50 or fewer employees). For those businesses that have more than 50 employees, grant funds may not be used to reimburse work-based learning costs.

For grants awarded under this FOA, the negotiated reimbursement percentage of work-based learning costs may be as high as 50 percent of the participant's hourly wage for employers with 50 or fewer employees. We also encourage grantees to negotiate lower rates or variable rates (such as starting at the maximum allowable reimbursement rate and reducing the subsidy over time), where possible, to ensure that the maximum number of apprentices will be served by the project.

The following are additional restrictions for use of grant funds for work-based learning:

- a) Participant placements may only occur in private for-profit and nonprofit sectors (i.e., the grant does not allow for public sector placements); and
- b) No placement may be made in staffing agencies providing workers on a temporary basis to employers for which the agency receives compensation from an employer.

5. Use of Funds for Supportive Services

Grantees may use up to 10 percent of grant funds to provide supportive services to individuals who are participating in education and training activities provided through the grant. Under this FOA, supportive services for training apprentices include services such as transportation, child care, dependent care, housing, and needs-related payments that are necessary to enable an individual to participate in education and training activities funded through this grant. Grantees may provide supportive services in various ways, including, but not limited to, providing the supportive service itself (e.g., childcare); providing apprentices with a voucher for the service (e.g., public transportation cards or tokens); or providing a stipend directly to the apprentice. Where stipends for supportive services are provided, the stipend amount must be for costs of a specific supportive service (e.g., childcare), rather than simply based on an unidentified need. For the purposes of this FOA, grantees may use grant funds, up to the percentage specified above, to provide supportive services only to individuals who are participating in education and training activities provided through the grant, and only when: 1) they are unable to obtain such services through other programs, and 2) such services are necessary to enable individuals to participate in education and training activities under the grant.

Grantees may establish limits on the provision of supportive services or provide their sub-recipients with the authority to establish such limits, including a maximum amount of funding and maximum length of time for supportive services to be available to apprentices. Grantees must ensure that their use of grant funds on supportive services is consistent with their organization's established written policy on the provision of

supportive services. Additionally, we encourage grantees to identify other sources of funding for supportive services, including through co-enrolling in WIOA.

6. Use of Funds for Incentive Payments to Collect Employment Outcomes

For purpose of this FOA, grantees may use up to 1.5 percent of grant funds for the provision of gift cards or other payments to apprentices for providing information on their employment status after they leave the program, for the purposes of increasing reported employment and retention outcomes to the Department. These incentive payments must be tied to the goals of the grant. Grantees must have policies and procedures in place governing the awarding of incentive payments, and any incentive payments provided under this grant must comply with these organizational policies.

7. Grant Profit

For all grant recipients and sub-recipients, the earning of profit is not an allowable cost item. Earnings above actual costs incurred are to be treated as program income. Any program income earned must be used for program purposes.

F. OTHER SUBMISSION REQUIREMENTS

Withdrawal of Applications: You may withdraw an application by written notice to the Grant Officer at any time before an award is made.

V. APPLICATION REVIEW INFORMATION

A. CRITERIA

Criterion	Points (maximum)
1. Statement of Need <u>(See Section IV.B.3.a. Statement of Need)</u>	12
(a) Target Industry/Occupation and Employer Demand	6
(b) Populations Served	4
(c) Priority Consideration: Opportunity Zones	2
2. Expected Outcomes, and Outputs <u>(See Section IV.B.3.b. Expected Outcomes and Outputs)</u>	38
(a) Apprentice Training and Employment Performance Outcomes	20
(b) Expanding Apprenticeship Programs Outputs	14

(c) Feasibility of Proposed Outcomes	4
3. Project Design <u>(See Section IV.B.3.c Project Design)</u>	36
(a) Apprenticeship Partnership	12
(b) Apprenticeship Training Design	20
(c) Project Work Plan	4
4. Organizational, Administrative, and Fiscal Capacity <u>(See Section IV.B.3.d Organizational, Administrative, and Fiscal Capacity)</u>	6
(a) Capacity of Lead Applicant, Partnership Structure, and Administrative Controls and Systems	4
(b) Financial, Data Collection, and Performance Reporting Systems	2
5. Past Performance – Programmatic Capability <u>(See Section IV.B.3.e Past Performance – Programmatic Capability)</u>	4
6. Budget and Budget Justification <u>(See Section IV.B.3.f Project Budget)</u>	4

We have instituted procedures for assessing the technical merit of applications to provide for an objective review of applications and to assist you in understanding the standards against which your application will be judged. The evaluation criteria are based on the information required in the application as described in Sections IV.B.2. Project Budget and IV.B.3. Project Narrative. Reviewers will award points based on the evaluation criteria described below.

Section IV.B.3. Project Narrative of this FOA has several “section headers” (i.e., IV.B.3.a.(1) Statement of Need). Each of these “section headers” of the Project Narrative include one or more “criterion,” and each “criterion” includes one or more “rating factors,” which provide detailed specifications for the content and quality of the response to that criterion. Each of the rating factors have specific point values assigned. These point values are the number of points possible for the application to earn for the rating factor.

B. STANDARDS FOR EVALUATING THE APPLICANT’S RESPONSE TO EACH REQUIREMENT

Section IV.B.3. Project Narrative provides a detailed explanation of the information an application must include (e.g., a comprehensive work plan for the whole period of performance with feasible and realistic dates). Reviewers will rate each “rating factor” based on how fully and convincingly the applicant responds. For each “rating factor” under each “criterion,” panelists will determine whether the applicant thoroughly meets, partially meets, or fails to meet the “rating factor,” based on the definitions below:

TABLE 1:

Standard Rating	Definition	Standard for Calculating Points
Thoroughly Meets	The application thoroughly responds to the rating factor and fully and convincingly satisfies all of the stated specifications.	Full Points
Partially Meets	The application responds incompletely to the rating factor or the application convincingly satisfies some, but not all, of the stated specifications.	Half Points
Fails to Meet	The application does not respond to the rating factor or the application does respond to the rating factor but does not convincingly satisfy any of the stated specifications.	Zero Points

In order to receive the maximum points for each rating factor, applicants must provide a response to the requirement that fully describes the proposed program design and demonstrates the quality of approach, rather than simply re-stating a commitment to perform prescribed activities. In other words, applicants must describe *why* their proposal is the best strategy and *how* they will implement it, *rather than* that the strategy contains elements that conform to the requirements of this FOA.

C. REVIEW AND SELECTION PROCESS

1. Merit Review and Selection Process

A technical merit review panel will carefully evaluate applications against the selection criteria to determine the merit of applications. These criteria are based on the policy goals, priorities, and emphases set forth in this FOA. Up to 100 points may be awarded to an applicant, depending on the quality of the responses provided. The final scores (which may include the mathematical normalization of review panels) will serve as the primary basis for selection of applications for funding. The panel results are advisory in nature and not binding on the Grant Officer. The Grant Officer reserves the right to make selections based solely on the final scores or to take into consideration other relevant factors when applicable. Such factors may include the geographic distribution of funds, distribution among industries/occupations, representation among new and expanded apprenticeship programs, and/or other relevant factors. The Grant Officer may consider any information that comes to his/her attention.

The government may elect to award the grant(s) with or without discussions with the applicant. Should a grant be awarded without discussions, the award will be based on the applicant's signature on the SF-424, including electronic signature via E-

Authentication on <https://www.grants.gov>, which constitutes a binding offer by the applicant.

2. Risk Review Process

Prior to making an award, ETA will review information available through various sources, including its own records and any OMB-designated repository of government-wide eligibility qualification or financial integrity information, such as Federal Awardee Performance and Integrity Information System (FAPIIS), Dun and Bradstreet, and “Do Not Pay.” Additionally, ETA will comply with the requirements of 2 CFR Part 180 codified by DOL at 29 CFR Part 98 [Government-wide Debarment and Suspension (Non-procurement)]. This risk evaluation may incorporate results of the evaluation of the applicant’s eligibility (application screening) or the quality of its application (merit review). If ETA determines that an award will be made, special conditions that correspond to the degree of risk assessed may be applied to the award.

Criteria to be evaluated include:

- (1) Financial stability;
- (2) Quality of management systems and ability to meet the management standards prescribed in the Uniform Grant Guidance;
- (3) History of performance. The applicant’s record in managing awards, cooperative agreements, or procurement awards, if it is a prior recipient of such Federal awards, including timeliness of compliance with applicable reporting requirements and, if applicable, the extent to which any previously awarded amounts will be expended prior to future awards;
- (4) Reports and findings from audits performed under Subpart F – Audit Requirements of the Uniform Grant Guidance or the reports and findings of any other available audits and monitoring reports containing findings, issues of non-compliance, or questioned costs;
- (5) The applicant’s ability to effectively implement statutory, regulatory, or other requirements imposed on recipients.

NOTE: As part of the Employment and Training Administration’s Risk Review process, The Grant Officer will determine:

- If the applicant had any restriction on spending for any ETA grant due to adverse monitoring findings ; or
- If the applicant received a High Risk determination in accordance with Training and Employment Guidance Letter (TEGL) 23-15.

Depending on the severity of the findings and whether the findings were resolved, the Grant Officer may, at his/her discretion, elect to not fund the applicant for a grant award regardless of the applicant’s score in the competition.

All applicants must submit the following information (suggested template below) for ETA to assess the applicant's Financial System. Applicants may use the suggested template or answer the questions in a separate attachment. This information will be taken into account as one component of ETA's Risk Review Process. It is unlikely that an organization will be able to manage a Federal grant without the following system/processes in place. Applicants are expected to have these in place before applying for a grant with ETA.

U.S. DEPARTMENT OF LABOR -EMPLOYMENT AND TRAINING ADMINISTRATION (ETA)		
FUNDING OPPORTUNITY ANNOUNCEMENT: FINANCIAL SYSTEM ASSESSMENT		
SECTION A: PURPOSE		
<p>The financial responsibility of grantees must be such that the grantee can properly discharge the public trust which accompanies the authority to expend public funds. Adequate administrative and financial systems including the accounting systems should meet the following criteria as contained in 2 CFR 200 and 2 CFR 2900.</p> <p>(1) Accounting records should provide information needed to adequately identify the receipt of funds under each grant awarded and the expenditure of funds for each grant.</p> <p>(2) Entries in accounting records should refer to subsidiary records and/or documentation which support the entry and which can be readily located.</p> <p>(3) The accounting system should provide accurate and current financial reporting information.</p> <p>(4) The accounting system should be integrated with an adequate system of internal controls to safeguard the funds and assets covered, check the accuracy and reliability of accounting data, promote operational efficiency, and encourage adherence to prescribed management policies.</p>		
SECTION B: GENERAL		
<p>1. Complete the following items:</p>		
<p>a. When was the organization founded/incorporated (<i>month, day, year</i>)</p>	<p>b. Principal officers Titles</p>	
<p>c. Employer Identification Number:</p>		
<p>d. Number of Employees Full Time: Part Time:</p>		
<p>2. Is the organization affiliated with any other organization: Yes No If yes, please provide details as to the nature of the company (for profit, non-profit, LLC, etc) and if it provides services or products to the organization in relation to this grant.</p>		<p>3. Total Sales/Revenues in most recent accounting period. (<i>12 months</i>) \$</p>
SECTION C: ACCOUNTING SYSTEM		
<p>1. Has any Government Agency rendered an official written opinion concerning the adequacy of the accounting system for the collection, identification and allocation of costs under Federal contracts/grants? Yes No</p>		
<p>a. If yes, provide name, and address of Agency performing review:</p>	<p>b. Attach a copy of the latest review and any subsequent correspondence, clearance documents, etc.</p>	
	<p align="center">Note: If review occurred within the past three years, omit questions 2-8 of this Section and Section D.</p>	

PLANNING, POLICY AND GOVERNMENTAL AFFAIRS

AUGUST 29, 2019

ATTACHMENT 1

2. Which of the following best describes the accounting system:	State administered	Internally Developed	Web-based
3. Does the accounting system identify the receipt and expenditure of program funds separately for each contract/grant?	Yes	No	Not Sure
4. Does the accounting system provide for the recording of expenditures for each grant/contract by the component project and budget cost categories shown in the approved budget?	Yes	No	Not Sure
5. Are time distribution records maintained for an employee when his/her effort can be specifically identified to a particular cost objective?	Yes	No	Not Sure
6. If the organization proposes an overhead rate, does the accounting system provide for the segregation of direct and indirect expenses?	Yes	No	Not Sure
7. Does the organization have an approved indirect cost rate or cost allocation plan?	Yes	No	Not Sure
If so, who approved it (Federal Cognizant Agency or a Pass-through Entity)? What are the effective dates?			
8. Does the accounting/financial system include budgetary controls to preclude incurring obligations in excess of:			
a. Total funds available for a grant?	Yes	No	Not Sure
b. Total funds available for a budget cost category (e.g. Personnel, Travel, etc)?	Yes	No	Not Sure
9. Does the organization have an internal control structure that would provide reasonable assurance that the grant funds, assets and systems are safeguarded?	Yes	No	Not Sure
SECTION D: FINANCIAL STABILITY			
1. Is there any legal matter or an ongoing financial concern that may impact the organization's ability to manage and administer the grant? Yes No If yes, please explain briefly.			
SECTION E: FINANCIAL STATEMENTS			
1. Did an independent certified public accountant (CPA) ever examine the financial statements? Yes No			
2. If an independent CPA review was performed please attach a copy of their latest report and any management letters issued. Enclosed N / A			
3. If an independent CPA was engaged to perform a review and no report was issued, please provide details and an explanation below:			
SECTION F: ADDITIONAL INFORMATION			

1. Use this space for any additional information (*indicate section and item numbers if a continuation*)

VI. AWARD ADMINISTRATION INFORMATION

A. AWARD NOTICES

All award notifications will be posted on the ETA Homepage (<https://www.doleta.gov>). Applicants selected for award will be contacted directly before the grant's execution. Non-selected applicants will be notified by mail or email and may request a written debriefing on the significant weaknesses of their application.

Selection of an organization as a recipient does not constitute approval of the grant application as submitted. Before the actual grant is awarded, we may enter into negotiations about such items as program components, staffing and funding levels, and administrative systems in place to support grant implementation. If the negotiations do not result in a mutually acceptable submission, the Grant Officer reserves the right to terminate the negotiations and decline to fund the application. We reserve the right to not fund any application related to this FOA.

B. ADMINISTRATIVE AND NATIONAL POLICY REQUIREMENTS

1. Administrative Program Requirements

All grantees will be subject to all applicable Federal laws and regulations—including the OMB Uniform Guidance, and the terms and conditions of the award. The grant(s) awarded under this FOA will be subject to the following administrative standards and provisions:

- a. Non-Profit Organizations, Educational Institutions, For-profit entities and State, Local and Indian Tribal Governments – 2 CFR Part 200 (Uniform Administrative Requirements, Cost Principles, and Audit Requirements for Federal Awards) and 2 CFR 2900 (DOL's Supplement to 2 CFR Part 200)
- b. Appeal – This program is authorized under section 414(c) of the American Competitiveness and Workforce Improvement Act of 1998 (ACWIA), as amended (codified at 29 USC 2916a). Therefore, appeal under sections 186 of the Workforce Investment Act or the Workforce Innovation and Opportunity Act is not available.

- c. All entities must comply with 29 CFR Part 93 (New Restrictions on Lobbying), 29 CFR Part 94 (Governmentwide Requirements for Drug-Free Workplace (Financial Assistance)), 29 CFR Part 98 (Governmentwide Debarment and Suspension, and drug-free workplace requirements), and, where applicable, 2 CFR Part 200 (Audit Requirements).
- d. 29 CFR Part 2, subpart D—Equal Treatment in Department of Labor Programs for Religious Organizations; Protection of Religious Liberty of Department of Labor Social Service Providers and Beneficiaries.
- e. 29 CFR Part 31—Nondiscrimination in Federally Assisted Programs of the Department of Labor—Effectuation of Title VI of the Civil Rights Act of 1964.
- f. 29 CFR Part 32—Nondiscrimination on the Basis of Handicap in Programs or Activities Receiving Federal Financial Assistance.
- g. 29 CFR Part 35—Nondiscrimination on the Basis of Age in Programs or Activities Receiving Federal Financial Assistance from the Department of Labor.
- h. 29 CFR Part 36—Nondiscrimination on the Basis of Sex in Education Programs or Activities Receiving Federal Financial Assistance.
- j. 29 CFR Parts 29 and 30—Labor Standards for the Registration of Apprenticeship Programs, and Equal Employment Opportunity in Apprenticeship and Training, as applicable.
- k. DOL will follow the procedures outlined in the Department’s Freedom of Information ACT (FOIA) regulations (29 CFR Part 70). If DOL receives a FOIA request for your application, the procedures in DOL’s FOIA regulations for responding to requests for commercial/business information submitted to the government will be followed, as well as all FOIA exemptions and Procedures. See generally 5 U.S.C. § 552; 29 CFR Part 70.
- l. Standard Grant Terms and Conditions of Award—see the following link:
<https://www.doleta.gov/grants/resources.cfm>

2. Other Legal Requirements

a) Religious Activities

The Department notes that the Religious Freedom Restoration Act (RFRA), 42 U.S.C. Section 2000bb, applies to all Federal law and its implementation. If an applicant organization is a faith-based organization that makes hiring decisions on the basis of religious belief, it may be entitled to receive Federal financial assistance under this grant announcement and maintain that hiring practice. If a faith-based organization is awarded a grant, the organization will be provided with more information.

b) Lobbying or Fundraising the U.S. Government with Federal Funds

In accordance with Section 18 of the Lobbying Disclosure Act of 1995 (Public Law 104-65) (2 U.S.C. 1611), non-profit entities incorporated under Internal Revenue Service

Code Section 501(c) (4) that engage in lobbying activities are not eligible to receive Federal funds and grants. No activity, including awareness-raising and advocacy activities, may include fundraising for, or lobbying of, U.S. Federal, State or Local Governments (see 2 CFR 200.450 for more information).

c) Transparency Act Requirements

You must ensure that you have the necessary processes and systems in place to comply with the reporting requirements of the Federal Funding Accountability and Transparency Act of 2006 (Pub. Law 109-282, as amended by section 6202 of Pub. Law 110-252) (Transparency Act), as follows:

- Except for those excepted from the Transparency Act under sub-paragraphs 1, 2, and 3 below, you must ensure that you have the necessary processes and systems in place to comply with the subaward and executive total compensation reporting requirements of the Transparency Act, should they receive funding.
- Upon award, you will receive detailed information on the reporting requirements of the Transparency Act, as described in 2 CFR Part 170, Appendix A, which can be found at the following website: <https://edocket.access.gpo.gov/2010/pdf/2010-22705.pdf>

The following types of awards are not subject to the Federal Funding Accountability and Transparency Act:

1. Federal awards to individuals who apply for or receive Federal awards as natural persons (i.e., unrelated to any business or non-profit organization he or she may own or operate in his or her name);
2. Federal awards to entities that had a gross income, from all sources, of less than \$300,000 in the entities' previous tax year; and
3. Federal awards, if the required reporting would disclose classified information.

d) Safeguarding Data Including Personally Identifiable Information (PII)

Applicants submitting applications in response to this FOA must recognize that confidentiality of PII and other sensitive data is of paramount importance to the Department of Labor and must be observed except where disclosure is allowed by the prior written approval of the Grant Officer or by court order. By submitting an application, you are assuring that all data exchanges conducted through or during the course of performance of this grant will be conducted in a manner consistent with applicable Federal law and TEGL NO. 39-11 (issued June 28, 2012). All such activity

conducted by ETA and/or recipient(s) will be performed in a manner consistent with applicable state and Federal laws.

By submitting a grant application, you agree to take all necessary steps to protect such confidentiality by complying with the following provisions that are applicable in governing their handling of confidential information:

1. You must ensure that PII and sensitive data developed, obtained, or otherwise associated with DOL/ETA funded grants is securely transmitted.
2. To ensure that such PII is not transmitted to unauthorized users, all PII and other sensitive data transmitted via e-mail or stored on CDs, DVDs, thumb drives, etc., must be encrypted using a Federal Information Processing Standards (FIPS) 140-2 compliant and National Institute of Standards and Technology (NIST) validated cryptographic module. You must not e-mail unencrypted sensitive PII to any entity, including ETA or contractors.
3. You must take the steps necessary to ensure the privacy of all PII obtained from participants and/or other individuals and to protect such information from unauthorized disclosure. You must maintain such PII in accordance with the ETA standards for information security described in TEGL NO. 39-11 and any updates to such standards we provide to you. Grantees who wish to obtain more information on data security should contact their Federal Project Officer.
4. You must ensure that any PII used during the performance of your grant has been obtained in conformity with applicable Federal and state laws governing the confidentiality of information.
5. You further acknowledge that all PII data obtained through your ETA grant must be stored in an area that is physically safe from access by unauthorized persons at all times and the data will be processed using recipient-issued equipment, managed information technology (IT) services, and designated locations approved by ETA. Accessing, processing, and storing of ETA grant PII data on personally owned equipment, at off-site locations, (e.g., employee's home), and non-recipient managed IT services, (e.g., Yahoo mail), is strictly prohibited unless approved by ETA.
6. Your employees and other personnel who will have access to sensitive/confidential/proprietary/private data must be advised of the confidential nature of the information, the safeguards required to protect the information, and that there are civil and criminal sanctions for noncompliance with such safeguards that are contained in Federal and state laws.
7. You must have policies and procedures in place under which your employees and other personnel, before being granted access to PII, acknowledge their understanding of the confidential nature of the data and the safeguards with which they must comply in their handling of such data, as well as the fact that they may be liable to civil and criminal sanctions for improper disclosure.
8. You must not extract information from data supplied by ETA for any purpose not stated in the grant agreement.

9. Access to any PII created by the ETA grant must be restricted to only those employees of the grant recipient who need it in their official capacity to perform duties in connection with the scope of work in the grant agreement.
10. All PII data must be processed in a manner that will protect the confidentiality of the records/documents and is designed to prevent unauthorized persons from retrieving such records by computer, remote terminal or any other means. Data may be downloaded to, or maintained on, mobile or portable devices only if the data are encrypted using NIST validated software products based on FIPS 140-2 encryption. In addition, wage data may only be accessed from secure locations.
11. PII data obtained by the recipient through a request from ETA must not be disclosed to anyone but the individual requestor, except as permitted by the Grant Officer or by court order.
12. You must permit ETA to make onsite inspections during regular business hours for the purpose of conducting audits and/or conducting other investigations to assure that you are complying with the confidentiality requirements described above. In accordance with this responsibility, you must make records applicable to this Agreement available to authorized persons for the purpose of inspection, review, and/or audit.
13. You must retain data received from ETA only for the period of time required to use it for assessment and other purposes, or to satisfy applicable Federal records retention requirements, if any. Thereafter, you agree that all data will be destroyed, including the degaussing of magnetic tape files and deletion of electronic data.

e) Record Retention

You must follow Federal guidelines on record retention, which require that you maintain all records pertaining to grant activities for a period of at least three years from the date of submission of the final expenditure report. See 2 CFR 200.333-.337 for more specific information, including information about the start of the record retention period for awards that are renewed quarterly or annually, and when the records must be retained for more than three years.

f) Use of Contracts and Subawards

You must abide by the following definitions of contract, contractor, subaward, and subrecipient:

Contract: Contract means a legal instrument by which a non-Federal entity (defined as a state, local government, Indian tribe, institution of higher education (IHE), nonprofit organization, for-profit entity, foreign public entity, or a foreign organization that carries out a Federal award as a recipient or subrecipient) purchases property or services needed to carry out the project or program under a Federal award. The term as used in this FOA does not include a legal instrument, even if the non-Federal entity considers it a contract, when

the substance of the transaction meets the definition of a Federal award or subaward (see definition of Subaward below).

Contractor: Contractor means an entity that receives a contract as defined above in Contract.

Subaward: Subaward means an award provided by a pass-through entity (defined as a non-Federal entity that provides a subaward to a subrecipient to carry out part of a Federal program) to a subrecipient for the subrecipient to carry out part of a Federal award received by the pass-through entity. It does not include payments to a contractor or payments to an individual that is a beneficiary of a Federal program. A subaward may be provided through any form of legal agreement, including an agreement that the pass-through entity considers a contract.

Subrecipient: Subrecipient means a non-Federal entity that receives a subaward from a pass-through entity to carry out part of a Federal program; but does not include an individual that is a beneficiary of such program. A subrecipient may also be a recipient of other Federal awards directly from a Federal awarding agency.

You must follow the provisions at 2 CFR 200.330-.332 regarding subrecipient monitoring and management. Also see 2 CFR 200.308(c)(6) regarding prior approval requirements for subawards. When awarding subawards, you are required to comply with provisions on government wide suspension and debarment found at 2 CFR Part 180 and codified by DOL at 29 CFR Part 98.

g) Closeout of Grant Award

Any entity that receives an award under this Announcement must close its grant with ETA at the end of the final year of the grant. Information about this process may be found in ETA's Grant Closeout FAQ located at <https://www.doleta.gov/grants/docs/GCFAQ.pdf>.

3. Other Administrative Standards and Provisions

Except as specifically provided in this FOA, our acceptance of an application and an award of Federal funds to sponsor any programs(s) does not provide a waiver of any grant requirements and/or procedures. For example, the OMB Uniform Guidance requires that an entity's procurement procedures ensure that all procurement transactions are conducted, as much as practical, to provide full and open competition. If an application identifies a specific entity to provide goods or services, the award does not provide the justification or basis to sole source the procurement, i.e., avoid competition.

4. Special Program Requirements

a) ETA Evaluation

As a condition of grant award, grantees are required to participate in an evaluation, if undertaken by DOL. The evaluation may include an implementation assessment across grantees, an impact and/or outcomes analysis of all or selected sites within or across grantees, and a benefit/cost analysis or assessment of return on investment. Conducting an impact analysis could involve random assignment (which involves random assignment of eligible participants into a treatment group that would receive program services or enhanced program services, or into control group(s) that would receive no program services or program services that are not enhanced). We may require applicants to collect data elements to aid the evaluation. As a part of the evaluation, as a condition of award, grantees must agree to: (1) make records available to the evaluation contractor on participants, employers, and funding; (2) provide access to program operating personnel, participants, and operational and financial records, and any other pertaining documents to calculate program costs and benefits; (3) in the case of an impact analysis, facilitate the assignment by lottery of participants to program services (including the possible increased recruitment of potential participants); and (4) follow evaluation procedures as specified by the evaluation contractor under the direction of DOL, including after the period of operation.

After award, grantees will receive detailed guidance on ETA's evaluation methodology, including requirements for data collection. Grantees will receive technical assistance to support their participation in these activities.

b) Performance Goals

Please note that applicants will be held to outcomes provided, and failure to meet those outcomes may result in technical assistance or other intervention by ETA, and may also have a significant impact on decisions about future grants with ETA. Specifically, grantees are required to propose goals for the six outcome categories and three outputs identified in Section IV.B.3.a.(2) Expected Outcomes and Outputs, which are specific to this FOA, and report data to the Department in accordance with these outcome goals.

C. REPORTING

You must meet DOL reporting requirements. Specifically, you must submit the reports and documents listed below to DOL electronically:

1. Quarterly Financial Reports

A Quarterly Financial Status Report (ETA 9130) is required until such time as all funds have been expended or the grant period has expired. Quarterly reports are due 45 days after the end of each calendar year quarter. On the final Financial Status Report, you must include any subaward amounts so we can calculate final indirect costs, if applicable. You must use DOL's Online Electronic Reporting System and information and

instructions will be provided to grantees. For other guidance on ETA's financial reporting, reference Training and Employment Guidance Letter (TEGL) 02-16 and our webpage at https://www.doleta.gov/grants/financial_reporting.cfm.

a) Quarterly Performance Reports

You must submit a quarterly progress report within 45 days after the end of each calendar year quarter. This report includes a quarterly narrative report that details all grant activities that occurred during the quarter, as well as a quarterly performance report, which is produced online using a data file upload function that contains participant records. In order to submit these quarterly reports, the grantee will be expected to track and report on certain participant-level data to ETA, including Social Security Numbers (SSNs), on all individuals who are provided grant-funded services. The SSN information allows ETA to efficiently match employment data from state unemployment insurance and other wage records. Thus, the collection of participant SSNs lessens the burden on grantees in tracking exit-based employment measures (WIOA Primary Indicators of Performance), while permitting consistent and reliable outcome information to be produced regarding the program. Performance reporting for these grants will align with the WIOA performance reporting requirements.

The last quarterly progress report will serve as the grant's Final Performance Report. This report must provide both quarterly and cumulative information on the grant activities. It must summarize project activities, employment outcomes and other deliverables, and related results of the project, and must thoroughly document the training or labor market information approaches that you used.

We will provide you with an online reporting system, along with detailed formal guidance about the data and other information that is required to be collected and reported, on either a regular basis or a special request basis. Applicants may view the current OMB-approved reporting requirements that will apply to these grants, OMB Control No. 1205-0521. As noted above, these grants will align with WIOA performance reporting requirements, including the online reporting system. Grantees must agree to meet DOL reporting requirements.

VII. AGENCY CONTACTS

For further information about this FOA, please contact Denise Roach, Grants Management Specialist, Office of Grants Management, at (202) 693-3820. Applicants should e-mail all technical questions to roach.denise@dol.gov and must specifically reference FOA-ETA-19-09, and along with question(s), include a contact name, fax and phone number. This

Announcement is available on the ETA Web site at <https://www.doleta.gov/grants> and at <https://www.grants.gov>.

VIII. OTHER INFORMATION

A. WEB-BASED RESOURCES

DOL maintains a number of web-based resources that may be of assistance to applicants. These include the CareerOneStop portal (<https://www.careeronestop.org>), which provides national and state career information on occupations; the Occupational Information Network (O*NET) Online (<https://online.onetcenter.org>), which provides occupational competency profiles; and America's Service Locator (<https://www.servicelocator.org>), which provides a directory of our nation's American Job Centers (formerly known as One-Stop Career Centers).

B. APPRENTICESHIP RESOURCES

- Presidential Executive Order: Expanding Apprenticeship in America: <https://www.whitehouse.gov/presidential-actions/3245/>
- DOL Apprenticeship Web Site: <https://www.dol.gov/apprenticeship/> and <https://www.apprenticeship.gov/>
- Training and Employment Notice (TEN) 3-18: Creating Industry-Recognized Apprenticeships Programs to Expand Opportunity in America https://wdr.doleta.gov/directives/attach/TEN/TEN_3-18_Acc.pdf

C. INDUSTRY COMPETENCY MODELS AND CAREER CLUSTERS

ETA supports an Industry Competency Model Initiative to promote an understanding of the skill sets and competencies that are essential to an educated and skilled workforce. A competency model is a collection of competencies that, taken together, define successful performance in a particular work setting. Competency models serve as a starting point for the design and implementation of workforce and talent development programs. To learn about the industry-validated models, visit the Competency Model Clearinghouse (CMC) at <https://www.careeronestop.org/CompetencyModel>. The CMC site also provides tools to build or customize industry models, as well as tools to build career ladders and career lattices for specific regional economies.

D. SKILLSCOMMONS RESOURCES

SkillsCommons (<https://www.skillscommons.org>) offers an online library of curriculum and related training resources to obtain industry-recognized credentials in manufacturing, IT, health care, energy, and other industries. The website contains thousands of Open Educational Resources (OER) for job-driven workforce development, which were produced by grantees

funded through the US Department of Labor’s Trade Adjustment Assistance Community College and Career Training (TAACCCT) program. Community colleges and other training providers across the nation can reuse, revise, redistribute, and reorganize the OER on SkillsCommons for institutional, industry, and individual use. See Appendix C for more information.

E. WORKFORCEGPS RESOURCES

We encourage you to view the information on workforce resources gathered through consultations with Federal agency partners, industry stakeholders, educators, and local practitioners, and made available on WorkforceGPS at: <https://workforcegps.org>.

We encourage you to view the online tutorial, “Grant Applications 101: A Plain English Guide to ETA Competitive Grants,” available through WorkforceGPS at: <https://strategies.workforcegps.org/resources/2014/08/11/16/32/applying-for-eta-competitive-grants-a-web-based-toolkit-for-prospective-applicants-438?p=1>.

We created Workforce System Strategies to make it easier for the public workforce system and its partners to identify effective strategies and support improved customer outcomes. The collection highlights strategies informed by a wide range of evidence, such as experimental studies and implementation evaluations, as well as supporting resources, such as toolkits. We encourage you to review these resources by visiting <https://strategies.workforcegps.org>.

We created a technical assistance portal at <https://www.workforcegps.org/resources/browse?id=b8dd0aa1ecfb4b2282d6cd30c7248790> that contains online training and resources for fiscal and administrative issues. Online trainings available include, but are not limited to, Introduction to Grant Applications and Forms, Indirect Costs, Cost Principles, and Accrual Accounting.

IX. OMB INFORMATION COLLECTION

OMB Information Collection No 1225-0086, Expires June 30, 2019.

According to the Paperwork Reduction Act of 1995, no persons are required to respond to a collection of information unless such collection displays a valid OMB control number. Public reporting burden for this collection of information is estimated to average 20 hours per response, including time for reviewing instructions, searching existing data sources, gathering and maintaining the data needed, and completing and reviewing the collection of information.

Send comments about the burden estimated or any other aspect of this collection of information, including suggestions for reducing this burden, to the U.S. Department of Labor,

to the attention of the Departmental Clearance Officer, 200 Constitution Avenue NW, Room N1301, Washington, DC 20210. Comments may also be emailed to DOL_PRA_PUBLIC@dol.gov .

PLEASE DO NOT RETURN YOUR GRANT APPLICATION TO THIS ADDRESS.
ONLY SEND COMMENTS ABOUT THE BURDEN CAUSED BY THE COLLECTION OF INFORMATION TO THIS ADDRESS. SEND YOUR GRANT APPLICATION TO THE SPONSORING AGENCY AS SPECIFIED EARLIER IN THIS ANNOUNCEMENT.

This information is being collected for the purpose of awarding a grant. DOL will use the information collected through this “Funding Opportunity Announcement” to ensure that grants are awarded to the applicants best suited to perform the functions of the grant. This information is required to be considered for this grant.

Signed June 24, 2019, in Washington, D.C. by:
Brinda Ruggles
Grant Officer, Employment and Training Administration

APPENDIX A: LIST OF H-1B INDUSTRIES

The Apprenticeships: Closing the Skills Gaps grants will fund projects that support well-paying, middle- and high-skilled jobs across the entire range of H-1B industries.

Applicants should review the below list of industries that are using H-1B visas to hire foreign workers to assist your program alignment. Included within the below H-1B industries, the Department is particularly interested in expanding the apprenticeship model across H-1B industries for cybersecurity and artificial intelligence (AI) jobs. These jobs can fall within a single H-1B industry, or may cross more than one H-1B industry.

H-1B Industries that are using a significant number of visas to hire foreign workers include:

- IT and IT-related industries
- Health Care
- Advanced Manufacturing

These are the H-1B industries that we have identified as permissible for applicants to target under this grant competition. Applicants that propose to train apprentices in occupations that fall outside of these industries must provide data showing that they are occupations for which a significant number of H-1B visas have been certified. This may be shown by using the data provided on DOL's Foreign Labor Certification Data Center Web site.

To view specific occupations for which H-1B visas have been certified, visit the Department of Labor's Foreign Labor Certification Data Center Web site

(http://www.foreignlaborcert.doleta.gov/performance_data.cfm) and select the "Data Disclosure" tab for the latest database of occupations approved under H-1B petitions.

APPENDIX B: OPEN EDUCATIONAL RESOURCES (OER)

Open educational resources are freely accessible, openly licensed documents and media that are useful for teaching, learning, assessment, and research.

SkillsCommons (<https://www.skillscommons.org>)

The US Department of Labor' [Trade Adjustment Assistance Community College and Career Training \(TAACCCT\) program](#) created a free and open online library, called SkillsCommons, which contains free and open learning materials and program support materials for job-driven workforce development. The OER in SKillsCommons are produced by community colleges across the nation, and can be found, reused, revised, retained, redistributed, and remixed by individuals, institutions, and industry.

- **Finding Materials in SkillsCommons:** Information on how to browse for materials in SkillsCommons is available here: <http://support.skillscommons.org/home/discover-reuse/finding-materials/> For assistance finding a wide range of OER collections, please see:: <http://support.skillscommons.org/home/discover-reuse/finding-more-oers/>
- **Professional Development: Industry Experts Becoming Expert Instructors (IE2EI)** <http://support.skillscommons.org/connect/impact-communities/ie2et/>
The Industry Expert to Expert Instructor (IE2EI) IMPACT Community on SkillsCommons.org has produced free online videos, tools, and resources featuring exemplary teaching practices that educational institutions can easily adopt and adapt to produce successful transitions of industry experts into expert teachers.

For example, the IE2EI New Faculty Development Course is a free and user-friendly mini-course that provides essential information and guidance on classroom management, assessment and evaluation, engaging students, and other topics to support industry experts with strong content knowledge but little-to-no classroom teaching experience: <http://support.skillscommons.org/showcases/open-courseware/teacher-training/ie2ei-course/>

- **The IE2EI Network** (<http://voices.merlot.org/group/ie2et-impactcommunity>) supports workforce development programs across all industry sectors to prepare industry experts to become excellent teachers. Join the [online community forums for the IE2EI](#) at the MERLOT Voices website, a collection of over 100 online communities forums led by a wide range of individuals and groups.
- **Apprenticeships Showcase: Design for Success with SkillsCommons** <http://support.skillscommons.org/showcases/apprentices-resources/>
SkillCommons has created a collection of free and open educational resources supporting work-based learning and apprentices programs. To date, the site has compiled resources

in the following industries/occupational areas: Welding, Health care, HealthIT, and Industrial Technology. Each compilation includes the following types of materials: guidelines for the design of apprenticeship programs, instructional materials for apprenticeship programs, a Career One Stop occupational profile, and a link to DOL's Registered Apprenticeship Programs in the specific industry area.

- **Women in Sustainable Employment (WISE) Pathways**

<http://support.skillscommons.org/connect/impact-communities/wise/>

This SkillsCommons initiative has created a series of career exploration courses designed for women to explore non-traditional, in-demand jobs in the manufacturing, energy, construction, information technology and transportation industries. By completing all 16 sessions of the WISE Pathways program, women have the opportunity to learn about career paths, strategies in conflict management, team building, workplace expectations, resume creation, applying online, interviewing, and connecting with recruiters.

TAACCCT Program Finder (<https://www.careeronestop.org/taaccct>)

This site provides information about education and training programs funded by the Trade Adjustment Assistance Community College and Career Training (TAACCCT) Program. Applicants may find this site useful for identifying TAACCCT grantees who developed resources related to apprenticeships, including programs of study, courses, projects, and program support material.

APPENDIX C: NATIONAL OCCUPATIONAL FRAMEWORKS

The U.S. Department of Labor has contracted with the Urban Institute to develop voluntary, consensus-based National Occupational Frameworks (NOFs) to help employers and sponsors develop, and apprenticeship officials evaluate, new apprenticeship programs. These NOFs were developed in partnership with employers, sponsors, expert workers, educators, subject matter experts, trade associations, labor organizations, and licensing bodies to ensure that they meet the needs of a broad range of companies and organizations and enable industry-wide acceptance of apprenticeship training. For more information, please visit: <https://www.urban.org/policy-centers/center-labor-human-services-and-population/projects/competency-based-occupational-frameworks-registered-apprenticeships>.

The NOFs identify core job functions, competencies, and performance criteria that meet the needs of most employers who sponsor apprentices in a given occupation. To date, the NOFs approved by the Department include:

- Community Health Worker
- Medical Records and Health Information
- Cyber Security Support Technician
- Information Technology Generalist
- Medical Assistant

You may download a copy of the National Occupational Framework template to help create your own apprenticeship, using the following link: <https://innovativeapprenticeship.org/national-occupational-frameworks-2/>

For detailed information on the components of a National Occupational Framework, please see “The National Occupational Frameworks: A Technical Guide to Structure and Content, Draft 3.0 (January 2017),” which is found here: http://innovativeapprenticeship.org/wp-content/uploads/2017/02/NOF-tech-guide-with-appendices_revised.pdf

APPENDIX D: SUGGESTED PERFORMANCE OUTCOME MEASURES TABLE

A.	Apprenticeship Employment & Training Apprentice Performance Outcomes		
1	Total participants served Total number of all apprentices served (receiving a grant-funded and/or match-funded service, education/training) in apprenticeship programs. Figures provided for total apprentices served include all individuals who receive a grant-funded service, after they are determined eligible for the program.	Year 1: Year 2: Year 3: Year 4:	Total:
2	Total participants enrolled in education/training activities The total apprentices enrolled in education/training activities should not exceed total apprentices served.	Year 1: Year 2: Year 3: Year 4:	Total:
3	Total participants who complete education/training activities	Year 1: Year 2: Year 3: Year 4:	Total:
4	Total participants who complete education/training activities and receive a degree, or other type of credential	Year 1: Year 2: Year 3: Year 4:	Total:
5	Total number of participants who obtain employment This measure includes unemployed, underemployed and employed workers as defined on Section III.C.3. Eligible Participants. Incumbent workers should not be included in this outcome.	Year 1: Year 2: Year 3: Year 4:	Total:
6	Total number of incumbent worker participants who complete training activities and that advance into a new position This includes incumbent workers who advanced into a new position with their current employer or a new employer following the completion of a training program. Incumbent workers who do not advance into a new position (i.e., who retained their existing position or layoff aversion) following the completion of a training program should not be included in this outcome.	Year 1: Year 2: Year 3: Year 4:	Total:
B.	Expanding Apprenticeship Program Outputs		

1	Total number of all newly created apprenticeship programs, including newly created Registered Apprenticeship Programs.		Total:
2	Total number of existing apprenticeship programs, including Registered Apprenticeship Programs, that are expanded, (e.g., new industries, occupations or service areas, or increased number of apprentices registered.		Total:
3	Total number of employers engaged (i.e., those employers that adopt apprenticeship programs as a result of your grant project.		Total:

Please Note:

- Applicants should provide targets in raw numbers; percentages or other types of data projections are not acceptable.
- Applicants should provide targets for each year of the grant and for the total grant period. The figure provided for the total should equal the sum of the projections for each year.
- While applicants are required to propose goals for the six outcome categories identified in Section IV.B.3.a.(2) Expected Outcomes and Outputs, which are specific to this FOA, they will also be required to report outcomes in alignment with outcomes identified in WIOA, as applicable.

APPENDIX E: SUGGESTED PROJECT WORK PLAN FORMAT

Applicants are encouraged to align their goals with specific activities that will meet those goals. Sample activities can include project administration and ramp-up; partnership engagement, outreach and recruitment; enrollment and training; case management services and provision of other supportive services; employment placement; and follow-up tracking of apprentices to collect outcomes. For planning purposes, the applicant should identify key deliverables and the timeframe for achieving each deliverable, including any milestones to indicate progression of activities. The applicant should also provide the name of the lead or supporting institution engaged in each activity or producing each deliverable, including any partner organizations.

GOAL #1	<i>Insert goal</i>		
Activity: <i>Insert activity (Sample: Project Administration & Ramp-Up)</i>	<i>Insert description (if applicable)</i>	Lead/Support Implementer (s)	<i>Insert lead or supporting organization that will implement proposed activity</i>
Deliverable(s): <i>Insert deliverable(s)</i>	<i>Insert description (if applicable)</i>		
Milestones	Timeframe	Deliverable Dates	
<i>Insert milestone</i>	<i>Insert timeframe for deliverable</i>	Start:	<i>Insert start and end dates</i>
		End:	
		Annual Costs	
		Year 1	\$ Insert annual costs
		Year 2	\$
		Year 3	\$
		Year 4	\$
		TOTAL	\$
GOAL #2			
Activity:		Lead/Support Implementer (s)	
Deliverable(s):			
Milestones	Timeframe	Deliverable Dates	
		Start:	
		End:	
		Annual Costs	
		Year 1	\$
		Year 2	\$
		Year 3	\$
		Year 4	\$
		TOTAL	\$

Please Note: Applicants may replicate this chart in order to submit information on all activities and deliverables proposed during the period of performance.

APPENDIX F: SUGGESTED ABSTRACT FORMAT

Applicants may tailor this template as needed to fit your proposed application.

LEAD APPLICANT

Lead Applicant Organization Name:	
Lead Applicant Entity Type: <ul style="list-style-type: none"> • Trade, industry, or employer association; • Labor union; • Labor-management organization; • An institution of higher education; • An IHE representing a consortium of institutions of higher education; or • A state system of higher education, such as a community college system office or a single state higher educational board. <i>(If applying an IHE representing a consortium of IHEs, provide the names of IHE consortium members)</i>	
Lead Applicant Location: City and state	

APPRENTICESHIP PARTNERSHIP

Required Partners: The application must identify and include the types of entities listed below, which collectively form the “apprenticeship partnership,” and any optional partners that support the goals of the apprenticeship partnership.	
EMPLOYER PARTNERS <ul style="list-style-type: none"> • List of at least 3 employer partners if serving local/regional, or statewide geographic scope; • List of at least 5 employer partners if serving national geographic scope. 	
Name of Employer Partner(s):	Industry Sector:
INSTITUTIONS OF HIGHER EDUCATION	
Name of Institution(s) of Higher Education:	Industry Sector:

Optional Partners:		
Name of Optional Partner(s):	Type of Organization:	Industry Sector:

PROJECT INFORMATION

Geographic Scope: (Project Service Area(s)):	
<ul style="list-style-type: none"> Identify scope: local/regional, statewide, or national Identify specific location(s) where grant services will be provided (e.g. economic region(s), cities, counties, or state(s)) Indicate the census tract number(s) in your service area designated as a qualified Opportunity Zone, if applicable. 	
Total Funding Requested:	
Total Matched Funds: Must be 45 percent of total funding requested	
Project Title/Name:	
Proposed Number of Apprentices to be Served: Must align with the minimum goals as identified in Figure 1: Minimum Goals for Grant Apprentices Served During the Grant Period, Based on Funding Request	
Summary of Apprenticeship Program Activities:	
Targeted Population(s) to be Served: Unemployed, underemployed, and/or incumbent workers (within these three target groups applicants may also describe other populations such as: veterans, military spouses, transitioning service members, and underrepresented populations in apprenticeships, including women, people of color, and ex-offenders, and other populations with employment barriers that hinder movement into middle-to high-skilled H-1B occupations and industries.)	

INDUSTRY FOCUS

Targeted H-1B Industry Sector(s): (Indicate all that apply below)	Targeted H-1B Occupations: (Indicate the occupations where training will be provided) See Section I.C TARGET INDUSTRIES	Credential(s) to be Awarded
<input type="checkbox"/> Advanced Manufacturing		
<input type="checkbox"/> Health care		
<input type="checkbox"/> IT and IT-related Industries		
<input type="checkbox"/> Other(s): (Specify: _____) (Use only if following “Option 2” in Section I.C. Target Industries)		
New or Existing Apprenticeship Program: Does the proposed project include: <input type="checkbox"/> An <i>existing</i> apprenticeship program <input type="checkbox"/> A <i>new</i> apprenticeship program <input type="checkbox"/> Both		
Does the Project Focus on Occupations in: <input type="checkbox"/> Cybersecurity <input type="checkbox"/> Artificial Intelligence <input type="checkbox"/> Both		
Public Contact Information:	Name, Title: Address: Phone Number: Email Address:	

**PLANNING, POLICY AND GOVERNMENTAL AFFAIRS
AUGUST 29, 2019**

IDAHO DEPARTMENT OF LABOR

SUBJECT

Idaho Job Corps Demonstration Project Update

ALIGNMENT WITH STRATEGIC PLAN

Goal 4: Workforce Readiness: Objective A – Workforce Alignment

BACKGROUND/DISCUSSION

In April of 2019, Idaho Department of Labor was awarded funding for the Idaho Job Corps Demonstration Projects. Provisions of the grant require a presentation to the Idaho State Board of Education, as the project will impact colleges and high schools across the state.

The Idaho Job Corps demonstration project is a three-year grant, funded by the US Department of Labor (USDOL) that aims to service income-eligible youth, ages 16-24 by connecting them to training and workplace opportunities that will jumpstart them into a career. Idaho Job Corps will bring together community and government resources in a manner that provides wrap-around services for students, connecting them to training and in-demand jobs in Idaho.

IMPACT

This demonstration project will bring nearly \$18 million of funding to connect Idaho's youth to the workforce. It will require cooperation between IDOL and the State Board of Education, particularly in college and career readiness initiatives.

ATTACHMENTS

Attachment 1 – Idaho Job Corps Summary

STAFF COMMENTS AND RECOMMENDATIONS

The Job Corps demonstration project provides an opportunity to evaluate the effectiveness of wrap around services for low income youth.

BOARD ACTION

This item is for informational purposes only.

Idaho Job Corps Demonstration Project

The Idaho Job Corps demonstration project is a three-year grant, funded by the US Department of Labor (USDOL) that aims to service income-eligible youth, ages 16-24 by connecting them to training and workplace opportunities that will jumpstart them into a career. Idaho Job Corps will bring together community and government resources in a manner that provides wrap-around services for students, connecting them to training and in-demand jobs in Idaho.

As the grant recipient, the Idaho Department of Labor (IDOL) is serving as the center operator for the Centennial Job Corps facility, located in Nampa, Idaho. This facility will serve 150 students each year (50 residential and 100 non-residential), while partnering with College of Western Idaho to provide instruction. In years two and three, IDOL will partner with other community colleges to onboard 50 non-residential students each, bringing program participation up to 750 students. Upon enrollment at Idaho Job Corps, students will receive services that will help them explore their skills, interests, and aptitudes in order to identify a career pathway. Students will be connected to appropriate educational pathways. These pathways will include a high school diploma or GED, career technical training, and even associate degrees in some cases. By partnering with community colleges, Idaho Job Corps will be able to connect students to instruction that will lead to meaningful credentials. During their enrollment at Job Corps, all students will be required to complete an internship or apprenticeship with an employer that can translate into permanent job placement.

Idaho Job Corps will provide a plethora of social services for students in order to remove barriers that get in the way of students success; these will include healthcare services, dental services, food, wellness training, counseling, and life skills training. Idaho Job Corps will partner with community-based organizations for these services; through this structure, students will be able to access these services even after graduating from Job Corps. Additionally, Job Corps students will be connected to a myriad of volunteer and leadership opportunities both at the Centennial Job Corps facility, and around the community. Through these opportunities, students will be able to acquire leadership skills that are necessary for them to be success in their future jobs and in life.

IDOL has a cooperative agreement with the US Department of Labor. IDOL is in the planning phase of this project, and intends to begin services on October 1, 2019 for non-residential students, with services for residential students beginning in 2020. Over the summer, IDOL will be hiring staff that will help run the Centennial Job Corps Center, and will begin recruiting students in August. In years two and three of the grant, remote Job Corps sites will be open at or near each of the other community colleges in Idaho. The demonstration project is scheduled to conclude September 30, 2022.

Job Corps centers around the country aim to assist income-eligible youth by connecting them to training and jobs that empower them to become contributing members of society. This grant demonstration project gives Idaho the opportunity to customize the Job Corps model to fit Idaho's needs. The program will serve Idaho youth, and connect them to Idaho jobs, which in turn will boost Idaho's economy.

For More Information on Idaho Job Corps, Contact:

Jani Revier, Idaho Department of Labor Director
Tina Polishchuk , Idaho Job Corps Program Manager

Jani.Revier@labor.idaho.gov
Tina.Polishchuk@labor.idaho.gov

Rev. 07/02/19

Implementation Summary

In order to participate in Idaho Job Corps, students must meet the same eligibility requirements as all other Job Corps centers in the country. These include the following:

1. Students must lawfully reside in the US
2. Students must be between the ages 16 and 24
3. Students must qualify as low income
4. Students must have an educational barrier to their employment
5. Male students must have registered for Selective Service
6. It must be determined that a student's training needs are best served through Job Corps
7. Students must be able to participate in a group without interference to others
8. Students must agree to comply with rules of the center
9. Students may not have convictions of any severe felonies
10. Students may not be on probation or parole
11. Students must demonstrate that child care needs for any of their dependents are arranged
12. Students must agree to authorize the disclosure of health information
13. Students under the age of 18 must receive parental consent

Students may be enrolled in Idaho Job Corps from 3 to 24 months, depending on their educational needs. Upon admission into Idaho Job Corps, a student will engage in career exploration and will working intensively with an academic advisor who will assist them in setting up the best pathway to their career. In addition to education and skills training, Idaho Job Corps will offer intensive wrap-around services that will include counseling, healthy meals, recreational activities, medical exams, transportation and more.

At the end of their time at Idaho Job Corps, students will be connected to an employer for 4-6 weeks of training, at which point the employer can choose to retain the student full time. Students that are not retained by an employer will be connected to a WIOA Case Manager for further job searching.

To measure the success of the program, IDOL will collect data on:

- The percentage of program participants who are in education or training activities, or in unsubsidized employment, during the second and fourth quarter after exit from the program;
- The median earnings of program participants who are in unsubsidized employment during the second quarter after exit from the program;
- The percentage of program participants who obtain a recognized postsecondary credential, or a secondary school diploma or its recognized equivalent during participation in or within 1 year after exit from the program. Program participants who obtain a secondary school diploma or its recognized equivalent will be included in the percentage only if they also have obtained or retained employment, or are in an education or training program leading to a recognized postsecondary credential, within 1 year after exit from the program;
- The percentage of program participants who, during a program year, are in an education or training program that leads to a recognized postsecondary credential or employment and who are achieving measurable skill gains toward such a credential or employment; and the indicators of effectiveness in serving employers determined by the Secretaries of Labor and Education.

PLANNING, POLICY AND GOVERNMENTAL AFFAIRS
AUGUST 29, 2019

SUBJECT

Higher Education Task Force - Guided Pathways Workgroup Recommendations

REFERENCE

August 2017	Board approved FY 2019 Budget Requests.
September 29, 2017	Board adopted the Governor's Higher Education Task Force recommendations and amended the FY 2019 Budget Request to add three line items. The addition of the postsecondary degree audit/student data analytics system (K-20 Pipeline Recommendation – Guided Pathways) and the addition of \$5M in Statewide Scholarships for the Opportunity Scholarship (Access and Affordability Work Recommendation - Systemically increase dollars to fund all eligible Idaho high school students...)
October 2017	Board assigned the 12 Task Force Recommendations to one or more of the Board's standing committees for prioritization and initial implementation planning.
December 2017	Board approved implementation prioritization of the Higher Education Task Force recommendations at the committee level.
February 2018	The Board received an update on the implementation of the Higher Education Task Force recommendations.
August 2018	Board received an update on the final Guided Pathways Work Group recommendations and took action on those items tied to budget requests through the line item agenda.

ALIGNMENT WITH STRATEGIC PLAN

Goal 1: Educational System Alignment, Objective B: alignment and Coordination
Goal 4: Workforce Readiness, Objective A: Workforce Alignment.

BACKGROUND/DISCUSSION

On January 6, 2017, former Governor C.L. "Butch" Otter identified the need to focus on the postsecondary part of Idaho's K-through-Career education system and announced the creation of a Higher Education Task Force charged with studying the state of higher education in Idaho. The Task Force was charged with looking at initiatives underway, proven practices that support postsecondary access and completion, and the State's role in funding higher education. In addition, the Task Force was asked to make recommendations that focus on postsecondary access and completion, lead toward increased progress in meeting the Board's 60% college attainment goal, and transition the existing state-funding formula for higher education to a formula that focuses on student completion. The Board formally adopted the recommendations at its September 29, 2017 Special Board meeting.

PLANNING, POLICY AND GOVERNMENTAL AFFAIRS
AUGUST 29, 2019

At the October 2017 regularly scheduled Board meeting the Board assigned the various recommendations to the Board's standing committees: Business Affairs and Human Resources (BAHR), Instruction, Research and Student Affairs (IRSA), and Planning, Policy and Government Affairs (PPGA). Each of the committees were assigned the task of prioritizing their assigned recommendations. Committee priorities were brought back to the Board for consideration at the regular December 2017 Board meeting. The Board approved all prioritization recommendations as submitted. The PPGA Committee was assigned the lead on the Guided Pathways recommendation with the implementation work split between the PPGA and IRSA committee. The PPGA Committee was tasked with developing an implementation plan for K-12 and postsecondary transition recommendations.

As part of this work, Board Member Critchfield convened a workgroup comprised K-12 educators and postsecondary staff that work with advising students. The focus of the work during these two days was identifying strategies for advising students in elementary and secondary school and helping them through the transition to some form of postsecondary education. The work group identified 24 strategies and then consolidated those strategies to 16 recommendations. The group then prioritized the 16 recommendations. The work group recommendations are provided in priority order as Attachment 1.

Of the 16 recommendations from the work group, many are in progress:

- Recommendation 1 and 5 - The Board's FY 2020 Budget Request included a line item request for funding to scale up the parent academy work started at Boise State University and the College of Southern Idaho and funding for a system-wide contract for software that would create a transcript for high school students taking dual credit courses. The Parent Academy line item was not funded by the 2020 Legislature. The Board received funding for the implementation of a software solution for managing dual credit enrollment and transcripts on a system-wide basis.
- Recommendation 4 - The NextSteps website provides resources for college and career advising and career exploration through the Career Information System. Additional efforts need to be made to increase the visibility of the site with parents and to assure the information on the site is culturally relevant. Significant work has been done in this area and continues to progress.
- Recommendation 9 - The Career Information System provides tools including curriculum for school districts to use in class for career exploration. Additionally, the Idaho Digital Learning Academy provides an eighth grade career exploration course that is available for students. What was a standalone career information system has now been integrated into the NextSteps website and the resources provided through this site.
- Recommendation 11 - In 2017 a large group of stakeholders worked with Board staff, Department of Labor Staff and Department of Education staff to develop common descriptions of college and career advising models

school districts could use pursuant to Section 33-1212A, Idaho Code (College and Career Advisors and Student Mentors). This group identified six models. Each of these models can be found on the NextSteps Website and was shared with school districts and charter schools. Additional work needs to be done in this area with the postsecondary institutions on aligning terminology. It is recommended the Board's Instruction, Research and Student Affairs committee work with postsecondary institutions in this area.

- Recommendation 12 - In 2017 the Board incorporated College and Career Readiness Competencies into IDAPA 08.02.03 as an additional content standards student must master by the end of the 12th grade.

IMPACT

This item will inform the Board of the progress being made toward implementation on the Higher Education Task Force recommendation for P-20 Guided Pathways.

ATTACHMENTS

Attachment 1 – K-12 Guided Pathways Workgroup Recommendations

Attachment 2 – Higher Education Task Force Recommendation Assignments

STAFF COMMENTS AND RECOMMENDATIONS

While work continues to implement the recommendations adopted by the Board, additional areas have been identified where further Board action would help to move the recommendations forward. The areas identified include:

- Recommendation 2: Communication/Outreach to parents and students to increase engagement – Request a full-time position in the Board office that is dedicated to providing outreach to parents and students specific to work around guided pathways and increased parent and student engagement.
- Recommendation 3: Transition Coordinators/Near Peers statewide (in all high schools), consistent first year postsecondary experience – Direct Board staff to work with the postsecondary institutions to expand transition coordinators employed by the institutions statewide and develop a framework for a consistent first year postsecondary experience.
- Recommendation 5: Common Transcripts (HS/Dual Credit) – Clarify with the postsecondary institutions the expectation for use of unofficial transcripts from students matriculating from an Idaho public secondary schools directly to postsecondary institutions prior to graduation (7th Semester Transcripts) and direct Board and Department staff to explore ways to use current technology and ISEE data for developing a statewide secondary transcript.
- Recommendation 11: Uniform Terminology (including postsecondary titles for advisors, single identified point of contact, consistent use of defined transition coordinator model at postsecondary institutions) – Direct staff to work with the postsecondary institutions on identifying barriers and ways to remove those barriers at the postsecondary institutions and to report back to the Instruction, Research and Student Affairs Committee.

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- Recommendation 14: College and Career Advising Centers around the state with trained staff in college and careers advising – Direct staff to work with the postsecondary institutions to identify the resources needed for their advising centers/staff to serve in this capacity and to report back to the Instruction, Research and Student Affairs Committee.
- Recommendation 15: Grade 8 advising overhaul. Push advising down to the sixth grade. Direct staff to look at ways to expand college and career advising resources and the current “8th Grade/High School” plans to the sixth grade.

BOARD ACTION

I move to direct the Executive Director to add one additional line item to the Office of the State Board of Education’s FY 2021 Budget request for one FTE to serve in the role of a Community Outreach Coordinator for the purposes on implementing Recommendation 2 in Attachment 1.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

K-12 Guided Pathways Workgroup – Prioritized Recommendations

1. Parent Academy
2. Communication/Outreach to parents and students, increased parent and student engagement
3. Transition Coordinators/Near Peers statewide (in all high schools), consistent first year postsecondary experience
4. Parent Portal – resource for college and career advising and career exploration
5. Common Transcripts (HS/Dual Credit)
6. School Counselor Roles/Duties defined (eliminate non-school counselor duties from current tasks)
7. Simplify Advanced Opportunities Administration
8. BEST, AVID, etc. (Student Type) Programs funded/provided statewide
9. Create a uniform K-12 career exploration class.
10. Liaison/better customer service/reduce confusion (between K-12 and postsecondary)
11. Uniform Terminology (including postsecondary titles for advisors, single identified point of contact, consistent use of defined transition coordinator model – six defined models).
12. Senior Projects (expand to include more career exploration/internships) – Require to be more meaningful.
13. New standards of Life Skills added to existing content standards.
14. College and Career Advising Centers around state with trained staff in college and career advising. At institutional level with defined roles.
15. 8th grade advising overhaul (start earlier). Push down to sixth grade. Starting in 2020.
16. System-like Approach to (LEA) College and Career Advising plans (develop best practices). (3, 11, 14).

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Higher Education Task Force Recommendations - Committee Assignments

<u>Recommendation</u>	<u>Committee Assignment</u>
1. Recommendation – Efficiencies, Cost Savings and Service – <u>Drive efficiencies, cost savings, and a higher level of service in back office functions by migrating from our current federated system of institutions to a more integrated, centralized and student-centric System (combined with: Centralize and standardize processes to promote system-wide efficiencies).</u>	<u>BAHR – Lead</u> <u>Business Affairs and HR Systems</u> <u>IRSA Admissions and Registration (student services)</u> <u>PPGA Governmental Affairs Directors consolidation of efforts.</u>
2. Recommendation – 60% Goal – <u>Review and update the 60% goal and establish a clear, credible, and measurable roadmap on how Idaho gets to the 60% goal. Focus on the key outcomes that are critical to the state's economic future and to the continued standard of living and quality of life for Idaho citizens.</u>	<u>PPGA Amendment to strategic plan and communications and outreach.</u>
3. Recommendation – Structural Change and System Improvements - <u>Implement structural change and system improvements through enhancements to critical areas of the public education system that will remove barriers as students progress through the educational pipeline and lead students to be prepared for postsecondary technical and academic training and education at the end of their high school experience. System improvements will include an enhanced statewide digital delivery system that creates a single digital campus that integrates and incorporates the Idaho educational system across the state and uses community outreach centers for support of students educational and career goals in local areas, thereby, removing barriers created by time or location restraints to opportunities for preparing students for postsecondary education as well as postsecondary resources. Identified barriers include the relevancy and rigor of the secondary senior year, more targeted advanced opportunities that lead to transferability of dual credits toward degree progress, full implementation of the Complete College America "Game Changers" through the strategies adopted by the Board's Complete College Idaho Plan, and alignment with workforce skills.</u>	<u>PPGA – Lead</u> <u>(Responsible for K-12 items, and policy issues related to administrative code or statute) – additional improvement to college and career advising and graduation requirements at the K-12 level. Administrative Code amendments would be necessary for K-12 requirement changes</u> <u>IRSA (Responsible for postsecondary items) – full implementation of Game Changers adopted by the Board in 2012. Implementation of a degree audit/student data analytics system for postsecondary students, development of postsecondary pathways. Development of dual credit pathways and offers that better serve students progression toward a degree or certificate.</u>
4. Recommendation – Guided Pathways (P-20) - <u>Develop and implement a comprehensive guided pathways program starting with early learning opportunities for students that are culturally relevant and provide support and guidance for the student through the education pipeline (early learning to prepare students for kindergarten through graduate degree attainment). An integrated guided pathways program would include parent engagement, student academic and career planning, proactive advising with early and urgent intervention (targeted/relevant), work-based learning, and community engagement (e.g. Indiana's Twenty-first Scholars and Scholar Success programs, Tennessee's Promise and Achieves programs, Iowa's BEST Program and Maryland's Achieving Collegiate Excellence and Success program). Advising activities would start no later than the 8th grade. The electronic campus platform will be used to expand access to resources and provide college and career advising and mentoring services to students in areas where other options are not available or practical or where time/life constraints may limit access to in-person resources. Educator and student access to the statewide data analytics/degree audit system will be integrated into the electronic campus platform.</u>	<u>PPGA – Lead</u> <u>Additional improvement to college and career advising and graduation requirements at the K-12 level. Administrative Code amendments would be necessary for K-12 requirement changes</u> <u>IRSA Implementation of a degree audit/student data analytics system</u> <u>Error! Bookmark not defined. for postsecondary students.</u>

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<p>5. Recommendation – Improved Certificate and Degree Completion - Leverage guided pathways to improve postsecondary completion through research based effective programs that lead to on-time completion in certificate and degree programs for all students. Barriers to access for place bound or time bound students will be removed through a state digital campus allowing individuals in remote and rural areas and working adults to access postsecondary education regardless of location and scheduling needs. Early interventions and targeted services will lead to greater retention and completion of postsecondary student's undergraduate goals as well as prepare students to pursue and complete graduate and professional degrees that are equally vital to the economic growth of Idaho.</p>	<p>IRSA – Lead <u>Development of program targeting individuals with some credits and no degree. Implementation of a degree audit/student data analytics system</u> <u>PPGA Amendments to scholarship requirements in Idaho Code and Admin Code</u></p>
<p>6. Recommendation – Provide a statewide digital delivery system - a digital campus that integrates and incorporates the current public system and partnering private institutions. This system is scalable, high quality, accessible and affordable.</p>	<p>IRSA</p>
<p>7. Recommendation – Systemically increase dollars to fund all eligible Idaho high school students while not losing sight of the goal of lowering cost/improving access.</p>	<p>BAHR – Lead <u>Institutional efficiencies, lower tuition and fees, elimination/ streaming of student fees.</u> <u>PPGA Legislation for scholarships</u></p>
<p>8. Recommendation - Further careful analysis, working with a technical committee and outside experts such as National Center for Higher Education Management Systems (NCHEMS) is necessary to ensure the outcomes-based funding model is fully vetted and pressure tested and that proper weighting is provided for each of the formula's metrics. Metrics should include:</p> <ol style="list-style-type: none"> 1. <u>Verifiable Job Outs</u> 2. <u>18-29 Credit Undergraduate Certificates</u> 3. <u>1-Year Certificates</u> 4. <u>Associate Degrees</u> 5. <u>Bachelor Degrees</u> 6. <u>High Impact Completion Bonus</u> 7. <u>At-Risk Completion Bonus</u> 8. <u>Progression per Student Credit Hour Milestone</u> 9. <u>Transfers</u> 10. <u>On-Time Completion Bonus</u> <p>The FY 2019 higher education budget line items requested by the colleges and universities should proceed through the budget process this year rather than attempting to launch an outcomes-based funding model for the 2018/2019 year. The State Board of Education should "shadow track" the metric outcomes for the 2018/2019 academic year to allow the institutions to prepare for full implementation in the following year.</p>	<p>BAHR</p>
<p>9. Recommendation – Adopt the Recommendations of the Governor's Workforce Development Task Force – The Governor's Higher Education Task Force should adopt the recommendations of the Governor's Workforce Development Task Force in order to establish a coordinated implementation effort between higher education, industry and state government to meet Idaho's future workforce needs.</p>	<p><u>Varied depending on individual recommendation.</u> <u>Additional staff work needed in this area.</u></p>
<p>10. Recommendation – Competency-Based System – The public higher education system should shift to a competency-based system for career technical education. (Implementation of this recommendation should be included as part of the work on Recommendation 5)</p>	<p>IRSA</p>

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11. Recommendation – Partner with Industry – The public higher education system should partner with industry to include more workplace experiences as part of certificate and degree programs. (Implementation of this recommendation should be included as part of the work on Recommendation 5)	IRSA
12. Recommendation – Workforce Training towards Degree or Certificate Completion – Workforce training completed by an individual should count towards degree or certificate completion. (Implementation of this recommendation should be included as part of the work on Recommendation 5)	IRSA

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DIVISION OF CAREER TECHNICAL EDUCATION (ICTE)

SUBJECT

Board Policy IV.E. Division of Career Technical Education – First Reading

REFERENCE

August 2017	Board approved the first reading of amendments to Board Policy IV.E. adding definitions of terms used and secondary program descriptions.
October 2017	Board approved the second reading of proposed amendments to Board Policy IV.E.
August 2018	Board approved proposed rule docket 08-0202-1805 establishing occupational specialist certificate endorsements
November 8, 2018	Board vacated pending rule docket 08-0202-1805 and requested the Division of Career Technical Education work more with school districts prior to bringing back occupational certification endorsements.

APPLICABLE STATUTE, RULE, OR POLICY

Idaho State Board of Education Governing Policies and Procedures Section IV.E.
Section 33-1204, Idaho Code
Idaho Administrative Code, IDAPA 08.02.02

ALIGNMENT WITH STRATEGIC PLAN

GOAL 1: EDUCATIONAL SYSTEM ALIGNMENT, Objective B: Alignment and Coordination

BACKGROUND/DISCUSSION

As career technical education continues to evolve, policies must also be updated to reflect those changes. Over the past two years, the Division of Career Technical Education has continued to refine its definitions, more clearly articulate its mission and focus, and strive to hold districts and programs accountable for delivering high quality career technical education programs of study that provide students with meaningful opportunities for postsecondary education and career opportunities.

The proposed amendments to Board Policy IV.E. Division of Career Technical Education provide updates to the existing policy, including bringing references to the Division's Administrator into alignment with Board Policy I.E. Executive Officers and removing obsolete references to Eastern Idaho Technical College. In addition, the amendments create three (3) new sections within the policy. These new sections update and formalize current practice of the Division of Career Technical Education and include: secondary career technical program approval requirements; identifying allowable uses for added-cost funds distributed by the Division; and formalizing occupational specialist certificate endorsements. The endorsement section, if approved, would be effective July 1, 2020.

Board Policy IV.E. currently defines secondary career technical education cluster programs and pathway programs. Both of these program types receive funding from the Division to help offset the additional costs of delivering a career technical funding program. These funds are separate and distinct from salary-based apportionment distributed by the Department of Education as part of the state's public schools funding. The Division has relied on an internal policy for several decades to govern the distribution and use of these added-cost funds. As programs continue to grow and expand, the Division's intent is to formalize the existing practice to help ensure consistency statewide and to help ensure both teachers and administrators have a common understanding of how career technical funds can help support strong, eligible programs.

The proposed policy would require programs eligible to receive secondary added-cost funds to first be approved by the Division. Applications for new, reactivated, or changed programs would be required to be submitted by February 15 prior to the year the district plans to launch the program. This approach has historically been the practice of the Division, but applications were generally approved without significant or substantive review of the alignment of the proposed program with workforce needs. The proposed amendments would further specify allowable uses for the distributed added-cost funds.

In addition to the program approval process and added-cost funds requirements, the proposed amendments identify endorsement areas for occupational specialist certificates. Occupational specialist certificate endorsements have been attached to Limited, Standard, or Advanced Occupational Specialist Certificates for years. However, no rule or policy regarding these endorsements exists outside of agency practice. Proposed rules regarding the Occupational Specialist Endorsement were vacated at the November 8, 2019 Special Board meeting after concerns were raised about a lack of stakeholder involvement in the development process for the endorsements, and the lack of a transition plan for moving from the current endorsement practices to the proposed endorsements.

Individuals coming from the private sector into the career technical education teaching profession are awarded a three (3) year non-renewable Limited Occupational Specialist (LOS) Certificate while they work to meet the necessary requirements to obtain a Standard Occupational Specialist teaching certification. Endorsements attached to Occupational Specialist Certificates focus on the content knowledge relevant to the industry from which the individual came prior to teaching and identify the areas in which the teacher is qualified to teach.

A workgroup of career technical education stakeholders has been instrumental in the development of the proposed endorsements and is still actively working with the Division's certification personnel to solidify the plan that will allow current occupational specialist certificate holders to move seamlessly from their current endorsement to the proposed endorsement. Another role of this workgroup is to

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actively communicate the work of the Division completed to date, receive feedback, and share concerns with the workgroup and the Division to inform next steps.

IMPACT

As part of the Division's ongoing efforts to formalize existing practices, these policy amendments will help ensure that added-cost funds are spent in a way that aligns with the Board intent, and that schools and districts understand both the flexibility and restrictions associated with added-cost funds. The impact of formalizing the occupational specialist certificate endorsements will help ensure that secondary instructors coming from industry will have an endorsement that aligns with their content knowledge and will help to ensure uniformity statewide regarding instructor qualifications.

ATTACHMENTS

Attachment 1 – Board Policy IV:E. Division of Career Technical Education – First Reading

STAFF COMMENTS AND RECOMMENDATIONS

Chapter 22, Title 33, Idaho Code, establishes the duties, powers, and responsibilities of the State Board for Career Technical Education, including naming the State Board of Education as the Board of Career Technical Education and granting authority to the Board to establish the Division of Career Technical Education. As the Board for Career Technical Education, the Board is granted the authority to disburse monies appropriated by the state for the promotion of career technical education. Section 33-2203, Idaho Code, further grants the Board "full power to formulate plans for the promotion of career technical education in such subjects as are an essential and integral part of the public school system of the state of Idaho, and to provide for the preparation of teachers of such subjects..." In addition to the authority vested in the Board for career technical education, Chapter 12, Title 33 establishes minimum educator certification requirements and grants the responsibility and authority of implementing these requirements in the State Board of Education. These duties include responsibility for certification of all teachers. The Board has exercised its duties for educator certification through the establishment of certification requirements in IDAPA 08.02.02, Rules Governing Uniformity. This includes the requirements for occupation specialist certificates as industry based career technical educator certificates. However, the occupational specialist certificate requirements established in IDAPA 08.02.02 only reference a work-based learning coordinator endorsement and career counseling endorsements for degree based career technical certification and there is no reference to endorsements for occupation specialists.

Pursuant to Section 33-107, Idaho Code the Board may delegate to its executive officer or such other administrators as the Board may appoint, to exercise discretionary authority and to perform duties vested in the Board. The delegation of duties vested in the Board are required to be adopted as statements of agency

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action as provided in Section 33-105, Idaho Code, and pursuant to a process that provides for notice, opportunity for input and formal adoption by the State Board. These requirements are exercised through the Board's current policy approval process consisting of two readings and public meeting of the Board.

While the Board has the authority to establish the requirements proposed in the amendments to Board Policy IV.E., the current practices of the Division have developed over the past decade or more without any record of Board action approving the practices or formal delegation through the process required in Section 33-105, Idaho Code.

Given the added focus on career technical education opportunities by state lawmakers and the Board's Career Technical Education Work Group, the Board should carefully consider the requirements for establishing career technical programs and the use of added cost funds. Educators participating in the Governor's Task Force, Our Kids, Idaho's Future, subcommittees have expressed concerns over the ability for rural school districts to develop full pathway programs as opposed to cluster programs. The proposed policy amendments would identify pathway programs as priority programs for consideration of approval and subsequent added-cost funding. Additionally, during the 2019 legislative session the House and Senate Education committees expressed concern over the perception that the Division was requiring all secondary career technical programs to have a face-to-face component regardless if the program could meet all of the established program standards virtually. The proposed policy is silent on requirements for face-to-face or in-person requirements as long as the program can meet the applicable program standards. While the discussions during the legislative session resulted in amendments to the requirements for career technical school added-cost funding and the proposed policy addresses career technical programs, additional clarification on the difference between the two types of funding may be helpful in the policy.

BOARD ACTION

I move to approve the first reading of amendments to Board policy IV.E. Division of Career Technical Education as provided in Attachment 1.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

Idaho State Board of Education

GOVERNING POLICIES AND PROCEDURES

SECTION: IV. ORGANIZATION SPECIFIC POLICIES AND PROCEDURES

Subsection: E. Division of Career Technical Education

October ~~2017~~2019

1. Purpose.

The Division of Career Technical Education (Division) provides leadership and coordination for programs in career technical education in various parts of the state. The general purposes ~~are of the Division is~~ to carry out the governing policies and procedures of the Board and the applicable provisions of state and federal ~~legislation~~ career technical education regulations assigned to the Division.

2. Delegation of Authority

The Administrator is the chief program and administrative officer of the Division, is appointed by, and serves in this position at the pleasure of the Board. The Board delegates to the state aAdministrator of the Division of eCareer tTechnical eEducation; serves as the chief executive officer of the statewide career technical education system; with the responsibility to supervise and manage career technical education programs in Idaho; within the framework of the Board's Governing Policies and Procedures for the organization, management, direction, and supervision of the agency and is held accountable by the Board for the successful functioning of the institution or agency in all of its units, divisions, and services pursuant to Board Policy I.E. Executive Officers. The ~~division a~~Administrator shall report to the Board through the Executive Director. ~~The Board has the power to name a president of Eastern Idaho Technical College who may perform such duties as delegated by the Board. For purposes of accreditation the EITC President shall be the CEO of the institution. The state a~~Administrator is responsible for the preparation and submission, through the Executive Director, of any agenda for matters related to career technical education for Board review and action.

3. Definitions

- a. Concentrator means a secondary student enrolled in a capstone course.
- b. Local Education Agencies means a public school district or charter school, including specially chartered districts.
- c. Technical College Leadership Council (TCLC) means the career technical education deans of the six regional public technical colleges in Idaho.
- ad. Technical Skill Assessment: means an assessment given at the culmination of a pathway program during the capstone course and measures a student's understanding of the technical requirements of the occupational pathway.

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~~be.~~ Workplace Readiness Assessment: means an assessment of a career technical education student's understanding of workplace expectations ~~upon completion of a career technical education program and entering the workforce.~~

4. Functions

The Division provides statewide leadership, administration, supervision, planning, and coordination for career technical education activities in Idaho. The major functions include:

a. Statewide Administration: maintaining a qualified professional staff to provide statewide leadership and coordination for career technical education and the programs offered in accordance with applicable state and federal legislation.

~~b. Eastern Idaho Technical College: assist in the delivery of career technical programs and courses consistent with the role and mission of the college, assist the EITC President with the programmatic affairs of the college, supervise the budgetary affairs of the college as part of the career technical education budget, and in cooperation with the EITC president, to recommend appointment of advisory committee representatives to the State Board.~~

~~be.~~ Supervisory and Consultative Services: providing technical assistance to local education agencies to assist in the implementation and maintenance ~~and implementation~~ of career technical education programs including support and leadership for student organizations and education equity.

~~cd.~~ Planning: assisting local education agencies in the development of annual plans and data collection and analyzing services for the establishment of a ~~Five-Year Plan~~, annual plans, and accountability reports from the local education ~~at~~ agencies.

~~de.~~ Evaluation: conducting and coordinating career technical education evaluations in accordance with state and federal guidelines to monitor program activities and to determine the status of program quality in relation to established standards and access.

~~ef.~~ Budget Preparation: preparing annual budgets and ~~the maintenance of~~ maintaining a statewide finance and accountability system.

~~fg.~~ Program and Professional Improvement: ~~through its professional staff,~~ initiating and coordinating research, curriculum development, process improvement, and staff development statewide.

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g~~h~~. Management Information: collecting, analyzing, evaluating and disseminating data and program information which provides a comprehensive source of accurate, current, and easily accessible information for statewide decision making.

h~~i~~. Coordination: providing liaison with related state agencies and organizations, ~~the State Advisory Council~~, business and industry, and community-based organizations.

5. Organization.

The programs and services of the ~~state d~~Division are organized into two (2) broad segments: (a) Regular Occupational Programs and (b) Special Programs and Support Services.

a. Regular Occupational Programs are programs designed to prepare students at the secondary and postsecondary levels with the skills, knowledge, attitudes, and habits necessary for entry-level employment in recognized occupations in Idaho regions, and may extend to the Northwest, and nationally. These programs also provide the supplemental training to upgrade the skills of those citizens of Idaho who are currently employed. Regular programs include: clusters and pathways in the following program areas:

- i. Agriculture, Food & Natural Resources;
- ii. Business & Marketing and Multi-Occupations;
- iii. Health Occupations Engineering & Technology Education;
- iv. Industrial Arts Family and Consumer Sciences and Human Services;
- v. Home Economics Health Professions and Public Safety; and
- vi. Business and Office Trades & Industry; and (7) Trade and Technical.

A program specialist-program quality manager is employed in each program area to provide leadership and technical assistance to local education agencies.

b. Special Programs and Support Services are special programs designed to serve students who are considered special populations, students with ~~in Consumer Home Economics~~, special needs, and include other program activities not considered occupational in nature. These programs include Single Parent/Displaced Homemaker, Education Equity, and middle school career technical education. These Special Programs include: (1) Consumer and Homemaking Education; (2) Pre-Career Technical Education; and (3) Special Needs—Disadvantaged and Handicapped. In addition, support services are provided in the areas of Education Equity; Program Improvement (to include Curriculum Development, Research, and Personnel Development); Career Technical Guidance; and Work Study.

c. Additionally, t~~t~~Through state and federal legislation regulations, or by contract for administration, career technical education the Division may supervises and manages the following programs: (1) Job Training and Partnership Act (JTPA);

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~~(2) State Occupational Information Coordinating Committee (SOICC); (3) the Displaced Homemaker Program; and (4) Fire Service Training; and, from time to time,~~ other career technical training programs as appropriate.

6. Program Delivery

Career ~~T~~technical ~~E~~education ~~P~~programs are made available at three (3) levels in Idaho -- secondary, postsecondary, and adult workforce training.

7. Secondary Programs

a. Secondary Programs are provided through all participating local education agencies and high school districts and several joint district career technical schools education programs. Secondary programs are established by the Division and may be categorized as either a cluster program or a pathway program fall into one of two program types and are subject to the following assessment requirements.

b. Cluster Program: provides introductory and intermediate courses as an introduction to a career technical area and the opportunity to learn workplace readiness expectations. career technical education students with career preparation opportunities and opportunities to develop an understanding of workplace readiness expectations. A cluster program must meet the following requirements:

- i. Consists of a variety of foundation and intermediate courses within a single Career Cluster. The program does not culminate in a capstone course.
- ii. Must be Offer a program that is two or more yearsthree or more semesters (or the equivalent) in length.
- iii. Demonstrates a strong career/workplace readiness skills alignment.
- iv. Incorporate an active Participate in a related Career Technical Student Organization into the program
- v. Include Maintain an active Technical Advisory Committee to guide program development and foster industry engagement.
- vi. Require the a nationally validated, industry-based Workplace Readiness Assessment created to evaluate skills and attitudes needed for success in the workplace administered by an approved developer as part of the program.

c. Pathway Program: provides specific career area occupational preparation. technical education students with specific career and occupational preparation, an understanding of the opportunity to learn workplace readiness expectations, and the knowledge and skill development required to transition into a similar as well as postsecondary program. transition opportunities. A pathway program must meet the following requirements:

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- 1) Consists of a sequence of courses that culminate in a capstone course and aligns with state-Board approved career technical education content standards.
- 2) ~~Must be two or more years~~ Offer a program that is three or more semesters (or the equivalent) in length.
- 3) Demonstrates a strong career/workplace readiness skills alignment.
- 4) ~~Incorporate an active~~ Participate in a related Career Technical Student Organization ~~into the program.~~
- 5) ~~Include~~ Maintain an active Technical Advisory Committee to guide program development and foster industry engagement.
- 6) Requiress the ~~Career Technical Education Consortium of States (CTECS)~~ Workplace Readiness Assessment as part of the program.
- 7) Demonstrates alignment to similar postsecondary program outcomes as well as to relevant industry recognized standards.
- 8) Offers work-~~related~~ based learning experience opportunities for students (paid or unpaid).
- 9) Requiress a pathway-identified Technical Skill Assessment for all students enrolled in the capstone course (~~career technical education concentrators~~).
- 10) ~~Require~~ Ensure the program meets the requirements for concentrators to obtain Technical Competency Credit for aligned postsecondary programs. ~~must meet expectation for at least one aligned postsecondary course~~
- 11) Requires a nationally validated, industry-based technical skill assessment administered by an approved developer.

~~i. The technical skills assessment is a nationally validated, industry-based assessment, administered by an approved vendor (e.g. CTECS). Instructor-developed and administered exams do not qualify. All juniors and seniors enrolled in a capstone course (concentrators) are required to take the technical skills assessment.~~

~~Note: In the event a concentrator is enrolled in a pathway program that does not yet have an approved technical skills assessment, that student will take only the workplace readiness assessment until the pathway program TSA has been finalized and approved.~~

~~ii. d. All junior and senior concentrators are required to take the technical skill assessment associated with their program. In the event a senior concentrator is enrolled in a pathway program that does not yet have an approved technical skill assessment, that student will take only the workplace readiness assessment until the pathway program technical skill assessment has been approved.~~

~~e. All seniors enrolled in at least their second~~ more than one career technical education course are required to take the workplace readiness assessment.

f. Secondary Program Approval

The Division accepts applications each year from local education agencies to establish new secondary career technical programs, change a program type or reactivate an inactive program each year. To be considered in a given fiscal year the application must be received no later than February 15. Only approved programs are eligible to receive added-cost funds, or additional career technical education funding including, Idaho Program Quality Standards, Program Quality Initiative, Workforce Readiness Incentive Grant, and federal Perkins funding. In order to receive added-cost funds, a program must also be taught by an appropriately certified career technical education teacher. Career technical education teacher certification requirements are established in IDAPA 08.02.02. Applications must be submitted in a format established by the Administrator.

The Division will evaluate applications on standard criteria. Approval of new programs and reactivation of inactive programs will be based on available funding; priority will be given to pathway programs. A local education agency must demonstrate that, as part of its decision for creating, changing, or reactivating a career technical program, the local education agency has considered the recommendations from a local technical advisory committee. If such a committee does not already exist, the local education agency must create a committee for the express purpose of evaluating local and/or regional need for the proposed career technical program and for providing guidance on the application for such program. Applications must indicate if the program is a cluster or a pathway program and will be evaluated according to the specific program type. Denial of applications will be based on failure to meet the application requirements, including but not limited to missing deadlines, information, failure to meet minimum program requirements or failure to respond to any request for additional information within the timeframe specified in the application. Local education agencies will be notified of their application status on or before April 30 of the application year. Prior to receiving added-cost funds, the local education agency must submit the applicable statement of assurances, as outlined in the application approval letter.

i. Comprehensive high school new cluster programs will be evaluated on the following criteria:

- 1) Meeting minutes that reflect recommendations from the local technical advisory committee
- 2) Alignment with one of four approved cluster program areas
- 3) Provides basic workplace readiness skills
- 4) Connection to a Career Technical Student Organization (CTSO) supported by the Division
- 5) Representation on the technical advisory committee in alignment with the program area industry
- 6) Realistic, applied learning, provided through lab and industry-related activities

- 7) Facilities to accommodate the program with equipment and space
 - 8) Agreement with the Statement of Assurances, as defined in the application
 - ii. Comprehensive high school new pathway programs will be evaluated on the following criteria:
 - 1) Meeting minutes that reflect recommendations from the local technical advisory committee
 - 2) Alignment with one of the approved pathway programs established by the Division
 - 3) Provide basic workplace readiness skills
 - 4) Consists of sequential, intermediate and capstone courses that meet the minimum requirements
 - 5) Connection to a Career Technical Student Organization (CTSO) supported by the Division
 - 6) Technical advisory committee that includes representatives from the identified occupational pathway
 - 7) Realistic, applied learning, provided through lab and industry-related activities
 - 8) Work-based learning opportunities
 - 9) Regional need for the program, established through labor market data
 - 10) Alignment with Board-approved program standards
 - 11) Alignment to related postsecondary program
 - 12) Facilities to accommodate a pathway program with the appropriate and relevant equipment and space for the pathway
 - 13) Agreement with the Statement of Assurances, as defined in the application
 - iii. Career Technical School (CTS) pathway programs must meet the evaluation criteria for a new pathway program, as well as the criteria outlined in IDAPA 55.01.03.
- g. Allowable Use of Added-Cost Funds

Added-cost funds are distributed to school districts to cover instructor and program expenses beyond those normally encountered by Idaho public schools at the secondary level. Allocations are calculated based on career technical education teacher full-time equivalency (FTE) and must be used to support all career technical education programs in the school districts. Added-cost funds may only be used for expenses directly related to an approved career technical education program in five (5) categories:

 - i. Instructional and Program Promotion Materials and Supplies
 - 1) Single copy reference materials, including single-user electronic reference materials
 - 2) Consumable student lab and classroom manuals
 - 3) Consumable materials and supplies that support the instructional program

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- 4) Workplace Readiness Assessment (WRA) and Technical Skill Assessment (TSA) exam costs (excluding retakes) for those exams administered outside the Division-funded testing window
- 5) Web-based licensed products to support program instruction and management
- 6) Materials and supplies used in CTE program promotion

ii. Equipment

- 1) Equipment costing \$500 or more per unit cost and having an expected life greater than two years (software is not considered equipment)
- 2) Computers and peripherals necessary for program instruction above and beyond equipment provided to academic classrooms

iii. Salaries

- 1) Time beyond the normal academic year to be defined as the last school session calendar day of the current year and before the first session calendar day of the subsequent year, which should be a documented agreement between the district and the CTE instructor
- 2) Time during the normal academic year for CTSO advisors who travel and stay in hotels to attend state and national leadership conferences with their students, beyond the normal school week to include one (1) day for a state leadership conference and two (2) days for a national leadership conference
- 3) For health professions programs only, time beyond the normal school day, i.e., evenings and weekends, for licensed professional teachers delivering required instruction to students at clinical sites

iv. Contracts

- 1) Services contracted by the district for maintaining and repairing CTE equipment and for operating and maintaining CTE labs and shops (e.g., equipment service contracts and hazardous waste disposal)
- 2) Fees and expenses for supplemental specialized instruction (e.g., certified CPR trainer, OSHA certification instructor, short-term specialized instruction from subject matter expert, supplemental staff to supervise students in a clinical environment)

v. Travel and Professional Expenses

- 1) Instructor travel costs and fees for CTE-related professional development (e.g., conferences, seminars, workshops, state-sponsored meetings, summer conference, and back-to-industry experiences related to the CTE program)

- 2) Instructor travel costs and fees related to CTE student activities and CTSO activities (e.g., conference registration fees, mileage, per diem, lodging)
- 3) Instructor membership dues for professional associations and CTSO affiliations related to program area.
- 4) Up to ten percent (10%) of the CTE added-cost funding for student transportation within the state to a state-approved CTSO leadership conference or event

vi. Added-Cost Funds may not be used for:

- 1) Print textbooks, electronic textbooks, and/or other electronic media used as the primary source of content delivery
- 2) Technology related to general instructional delivery (e.g., projectors, cell phones)
- 3) Classroom equipment, supplies, and web-based licensed products that are provided to all district teachers and classrooms
- 4) Fundraising equipment and supplies
- 5) Equipment not related to program instruction
- 6) Salaries and benefits for certified employees (i.e., teachers who hold certification) and classified employees (i.e., employees other than certified or professional teachers)
- 7) Salaries and benefits to replace furlough days
- 8) Salaries and benefits for district pre-service and/or in-service days
- 9) Salaries and benefits for substitutes
- 10) Contracted salaries or benefits to provide the basic instructional program
- 11) Fees to obtain or renew teaching credentials and/or professional licenses
- 12) Tuition and transcribed credits, including professional development credits
- 13) Individual student travel fees and expenses

6. Occupational Specialist Certificate Endorsements, effective July 1, 2020.

Pursuant to Section 33-1201, Idaho Code, every person employed in an elementary or secondary school in the capacity of a teacher must have a certificate issued under the authority of the State Board of Education. Certification requirements are established in IDAPA 08.02.02. In addition to a certificate, each certificate must have one or more endorsements indicating the occupational area the teacher is qualified in to provide instruction. Endorsement eligibility is determined by the Division of Career Technical Education. Career technical education endorsements consist of the following:

a. Endorsements A-C

- i. Administrative Services (6-12). Industry experience that indicates applied competence in the majority of the following areas: proficiency in word processing, spreadsheet, database, presentation, and technology media applications; accounting functions; legal and ethical issues that impact business; customer relations; business communication; and business office operations.

- ii. Agribusiness (6-12). Industry experience that indicates applied competence in the majority of the following areas: plant and animal science; agricultural economic principles; business planning and entrepreneurship; agriculture business financial concepts and recordkeeping systems; risk management in agriculture; laws related to agriculture and landowners; marketing and sales plans; and sales.
- iii. Agriculture Food Science and Processing Technologies (6-12). Industry experience that indicates applied competence in the majority of the following areas: properties of food; principles of processing; post-processing operations; safety practices; and equipment and tools used in food processing.
- iv. Agriculture Leadership and Communications (6-12). Industry experience that indicates applied competence in the majority of the following areas: applied communications and leadership through agricultural education; supervised agricultural experience; career opportunities in agricultural science, communications, and leadership; agriculture's impact on society; agricultural science principles; agricultural communication principles; and agricultural leadership principles.
- v. Agriculture Mechanics and Power Systems (6-12). Industry experience that indicates applied competence in the majority of the following areas: safety practices; tools and hardware; metal technology; power systems; electricity; mathematical applications; insulation; and careers in agricultural mechanics and powers systems.
- vi. Animal Science (6-12). Industry experience that indicates applied competence in the majority of the following areas: animal agricultural industries; nutritional requirements for livestock; livestock reproductive systems; principles of evaluation for animal selection; animal welfare, handling, and quality assurance; medication and care; disease transmission and care; harvesting and processing of animal products; and, animal science risk management.
- vii. Applied Accounting (6-12). Industry experience that indicates applied competence in the majority of the following areas: accounting functions; accounting ethics; software application packages; financial statements; asset protection and internal controls; inventory records; long-term assets; and payroll procedures.
- viii. Automated Manufacturing (6-12). Industry experience that indicates applied competence in the majority of the following areas: lab organization and safety practices, blueprint reading, measuring, computer-aided design (CAD); computer-aided manufacturing (CAM), computer numeric control

(CNC), fundamental power system principles, manufacturing processes, electronic and instrumentation principles, machining, robotics and materials-handling systems, and additive (3D) printing.

- ix. Automotive Collision Repair (6-12). Industry experience that indicates applied competence in the majority of the following areas: auto body collision-repair practices; tools; trade skills in refinishing, welding, and painting.
- x. Automotive Maintenance & Light Repair (6-12). Industry experience that indicates applied competence in the majority of the following areas: service, maintenance, and repair practices for a wide variety of vehicles; and diagnosing, adjusting, repairing, and replacing individual vehicle components and systems.
- xi. Business Digital Communications (6-12). Industry experience that indicates applied competence in the majority of the following areas: elements and principles of design and visual communications; professional communication skills; editing and proofreading; copyright and intellectual property law; portfolio development; content development strategy; branding and corporate identity; graphic communication production; video editing; web page development; web page design and layout; and web-related planning and organizational standards.
- xii. Business Management (6-12). Industry experience that indicates applied competence in the majority of the following areas: planning and organizing; directing, controlling and evaluating goals and accomplishments; financial decision-making; competitive analysis and marketing strategies; human resource management; customer relations; technology; project management; operations and inventory; and social responsibility.
- xiii. Cabinetmaking and Bench Carpentry (6-12). Industry experience that indicates applied competence in the majority of the following areas: cabinetmaking and millwork production; cutting, refinishing, installing, and shaping of various materials; knowledge of industry standards and construction applications; hardware; and blueprint reading.
- xiv. Certified Welding (6-12). Industry experience that indicates applied competence in the majority of the following areas: fundamental print reading; measurement and layout/fit-up techniques; properties of metals; shielded metal arc welding (SMAW); gas metal arc welding (GMAW and GMAW-S); flux cored arc welding (FCAW-G); gas tungsten arc welding (GTAW); thermal cutting processes; welding codes; inspection and testing principles; and fabrication techniques.

- xv. Child Development & Services (6-12). Industry experience that indicates applied competence in the majority of the following areas: early childhood-education career paths and opportunities for employment; ethical conduct; advocacy for children; child/human development and learning; family and community relations; child observation, documentation, and assessment; positive relationships and supportive interaction; and approaches, strategies, and tools for early childhood education.
- xvi. Commercial Photography (6-12). Industry experience that indicates applied competence in the majority of the following areas: ethics in photography, elements and principles of design composition, cameras and lenses, exposure settings, light sources, digital workflow, presentation techniques and portfolios, and production using industry standard software.
- xvii. Computer Support (6-12). Industry experience that indicates applied competence in the majority of the following areas: basic network technologies, laptop support, PC support, printer support, operating systems, security, mobile device support, troubleshooting techniques, and trends in the industry.
- xviii. Construction Trades Technology (6-12). Industry experience that indicates applied competence in the majority of the following areas: comprehensive knowledge of structural systems and processes, classical and contemporary construction elements, knowledge of industry standards, knowledge of architecture, basic cabinetry and millwork, and blueprint reading.
- xix. Cosmetology (6-12). Industry experience that indicates applied competence in the majority of the following areas: hair design; skincare; nail care; industry guidelines and procedures; entrepreneurship; and communications. Instructor must hold a current and valid Idaho license or certificate as a cosmetologist.
- xx. Culinary Arts (6-12). Industry experience that indicates applied competence in the majority of the following areas: experience as a chef in a full-service restaurant; business operations experience in the culinary/catering industry; communication and organization skills with customers and vendors; industry-recognized food safety and sanitation certification; knowledge of proper food handling, ingredients, food quality and control practices; culinary tools and equipment; cooking methods; meal preparation; menu planning principles and industry trends and career options.

b. Endorsements D-N

- i. Dental Assisting (6-12). Industry experience that indicates applied competence in the majority of the following areas: dental professions

pathways; ethics in dental practice; nutrition as related to oral health; infection control; occupational safety; dental-related anatomy and pathology; dental anesthesia; dental assisting skills; dental materials; and, dental radiology. Instructor must hold a current and valid Idaho license or certificate as a dental assistant, dental hygienist, or dentist.

- ii. Digital Media Production (6-12). Industry experience that indicates applied competence in the majority of the following areas: graphic design industry structure; elements and principles of design composition; visual communication; industry-standard software production; ethics and graphic design; digital portfolios; mathematical skills as related to design; communication skills; editing and proofreading; video editing; digital media and production; dissemination techniques and methods; broadcasting equipment, camera, and lens operations; light sources; presentation techniques; public speaking; and writing skills.
- iii. Drafting and Design (6-12). Industry experience that indicates applied competence in the majority of the following areas: technical drawings, scale drawings, architectural drafting, mechanical drafting, orthographic projection, two- and three-dimensional drawings, manual drafting, and computer aided design.
- iv. Ecology and Natural Resource Management (6-12). Industry experience that indicates applied competence in the majority of the following areas: ecological concepts and scientific principles related to natural resource systems; forest types; forest management components and practices; fire ecology and management; importance and application of GPS/GIS in natural resource management; fish and wildlife ecology; and mineral and energy resources management.
- v. Electrical Technology (6-12). Industry experience that indicates applied competence in the majority of the following areas: digital and solid-state circuits, DC principles, AC concepts, soldering techniques, circuits, and electrician-associated electronic components and tools. Instructor must hold a current and valid Idaho license or certificate as an electrician.
- vi. Electronics Technology (6-12). Industry experience that indicates applied competence in the majority of the following areas: digital and solid-state circuits; DC principles; AC principles; soldering techniques; circuits; digital electronics; electronic circuits; electronic devices; and electronic digital circuitry simulations and associated electronic components and tools.
- vii. Emergency Medical Technician (EMT) (6-12). Industry experience that indicates applied competence in the majority of the following areas: fundamental knowledge of the emergency management services (EMS) system; medical and legal/ethical issues in the provision of emergency care;

EMS systems workforce safety and wellness; documentation; EMS system communication; therapeutic communication; anatomy and physiology; medical terminology; pathophysiology; and lifespan development (per the EMR and EMT sections of the Idaho EMS Education Standards located on the Idaho Department of Health and Welfare website). Instructor must have passed the National Registry exam. Instructor must hold a current and valid Idaho EMS license or certificate and be certified as an EMT instructor through Idaho EMS.

- viii. Firefighting (6-12). Industry experience that indicates applied competence in the majority of the following areas: knowledge of local, state, and federal laws and regulations; firefighting procedures; firefighting tactics; firefighting equipment and vehicles; EMT basic training; first aid and CPR training; and reporting requirements under Idaho criminal code. Instructor must hold a current and valid Idaho license or certificate as an EMT and firefighter.
- ix. Graphic Design (6-12). Industry experience that indicates applied competence in the majority of the following areas: the graphic design industry; elements and principles of design and visual communication; production using industry standard software; branding and corporate identity; ethical and legal issues related to graphic design; portfolio development and evaluation; mathematics for visual communications; communication; editing and proofreading; graphic design in digital media; and applied art.
- x. HVAC Technology (6-12). Industry experience that indicates applied competence in technical subjects and skills related to the HVAC trade as approved by the Idaho HVAC Board and the Idaho State Board for Career Technical Education: installing, altering, repairing, and maintaining HVAC systems and equipment including air conditioners, venting or gas supply systems, ductwork, and boilers. Instructor must hold a current and valid Idaho license or certificate as an HVAC Technician.
- xi. Heavy Equipment/Diesel Technology (6-12). Industry experience that indicates applied competence in the majority of the following areas: knowledge of diesel engine service; preliminary inspection; identification and repair of vehicle components; preventative maintenance; and heavy equipment applications.
- xii. Hospitality Management (6-12). Industry experience that indicates applied competence in the majority of the following areas: business structures; economics; human resources; sales and marketing; finance and budgeting; safety and security; legal and ethical considerations; event planning and management; teamwork; communication skills; lodging operations; and food and beverage operations.

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- xiii. Hospitality Services (6-12). Industry experience that indicates applied competence in the majority of the following areas: careers in the hospitality and tourism industry; customer service; event planning implementation; procedures applied to safety, security, and environmental issues; practices and skills involved in lodging occupations and travel-related services; and facilities management.
- xiv. Industrial Mechanics (6-12). Industry experience that indicates applied competence in the majority of the following areas: industrial mechanics knowledge; shop skills; diagnostic and repair techniques; welding; hydraulic; electronic systems; and maintenance and preventative maintenance.
- xv. Journalism (6-12). Industry experience that indicates applied competence in the majority of the following areas: legal and ethical issues related to journalism and photojournalism, principles and techniques of media design, design formats, journalistic writing, social media and digital citizenship, and media leadership.
- xvi. Law Enforcement (6-12). Industry experience that indicates applied competence in the majority of the following areas: knowledge of local, state, and federal laws and regulations; defensive strategies; investigative strategies; search principles and strategies; tactical procedures; vehicle operations; knowledge of weapons and use where appropriate; first aid and CPR training; social and psychological sciences; and identification systems.
- xvii. Marketing (6-12). Industry experience that indicates applied competence in the majority of the following areas: economic systems; international marketing and trade; ethics; external factors to business; product/service management; pricing; distribution channels; advertising; sales promotion; public relations; retail management; market research and characteristics; digital marketing; and financing and financial analysis.
- xviii. Medical Assisting (6-12). Industry experience that indicates applied competence in the majority of the following areas: human anatomy, physiology and pathology, medical terminology, pharmacology, clinical and diagnostic procedures, medication administration, patient relations, medical law and ethics, scheduling, records management, and health insurance. Instructor must hold a current and valid medical assistant certification as evidenced in the national registry.
- xix. Networking Support (6-12). Industry experience that indicates applied competence in the majority of the following areas: PC hardware configuration, fundamental networking technologies, operating systems, basic networking, basic security, and basic network configurations.

xx. Nursing Assistant (6-12). Industry experience that indicates applied competence in the majority of the following areas: scope of practice; ethics and legal issues; communication and interpersonal relationships; documentation; care practices; infection prevention; human anatomy and physiology; medical terminology; personal care procedures; physiological measurements; nutritional requirements and techniques; procedures and processes related to elimination; quality patient environment; patient mobility; admission, transfer, and discharge procedures; care of residents with complex needs; and safety and emergency. Instructor must hold a current and valid Idaho registered nursing license, and be approved as a certified CNA primary instructor through Idaho Department of Health and Welfare.

c. Endorsements O-W

- i. Ornamental Horticulture (6-12). Industry experience that indicates applied competence in the majority of the following areas: safety practices; plant anatomy; plant physiology; plants identification skills; growing media; plant nutrition; integrated pest management; plant propagation; ornamental horticulture crops; business concepts; plant technologies; ornamental design standards; and career opportunities in ornamental horticulture.
- ii. Pharmacy Technician (6-12). Industry experience that indicates applied competence in the majority of the following areas: patient profile establishment and maintenance; insurance claim preparation; third-party insurance provider correspondence; prescription and over-the-counter medications stocking and inventorying; equipment and supplies maintenance and cleaning; and cash register operation. Instructor must be a pharmacist, registered nurse, or pharmacy technician holding a current and valid Idaho license or certification.
- iii. Plant and Soil (6-12). Industry experience that indicates applied competence in the majority of the following areas: plant anatomy and identification; plant processes, growth, and development; soil and water; plant nutrition; integrated pest management; careers and technology; and safety.
- iv. Plumbing Technology (6-12). Industry experience that indicates applied competence in technical subjects and skills related to the plumbing trade as approved by the Idaho Plumbing Board and the Idaho Board for Career Technical Education: repairing, installing, altering, and maintaining plumbing systems and fixtures including interconnecting system pipes and traps, water drainage, water supply systems, and liquid waste/sewer facilities. Instructor must hold a current and valid Idaho license or certificate as a plumber.

- v. Pre-Engineering Technology (6-12). Industry experience that indicates applied competence in the majority of the following areas: lab safety; impacts of engineering; ethics of engineering; design process; documentation; technical drawing; 3D modeling; material science; power systems; basic energy principles; statistics; and kinematic principles.
- vi. Precision Machining (6-12). Industry experience applied the majority of the following areas: precision machining practices; tools used to shape parts for machines; industrial mechanics; shop skills; safety in practice; blueprint reading; and diagnostic and repair techniques.
- vii. Programming & Software Development (6-12). Industry experience that indicates applied competence in the majority of the following areas: basic programming principles; problem solving; programming logic; validation; repetition; programming classes; exceptions, events, and functionality; arrays and structure; design principles; system analysis; and implementation and support.
- viii. Rehabilitation Services (6-12). Industry experience that indicates applied competence in the majority of the following areas: ethical, legal, and professional responsibilities; medical terminology; anatomy and physiology; roles and responsibilities of the rehabilitation team; patient care skills; therapeutic interventions; and common pathologies. Instructor must be a health professional holding a current and valid Idaho license or certificate in his/her field of study.
- ix. Small Engine Repair/Power Sports (6-12). Industry experience that indicates applied competence in the majority of the following areas: small gasoline engine construction and performance; industry-related resources; equipment used to diagnose and troubleshoot issues; repair; entrepreneurship; and customer service.
- x. Web Design and Development (6-12). Industry experience that indicates applied competence in the majority of the following areas: web page development, web page design and layout, integration of web pages, web planning and organizational standards, and web marketing.
- xi. Work-Based Learning (6-12). Educators assigned to coordinate approved work-based experiences must hold this endorsement. Applicants must hold an occupational endorsement on the Standard Instructional Certificate or Occupational Specialist Certificate, and complete coursework in coordination of work-based learning programs.

8. Postsecondary Programs

- b. Postsecondary Programs are provided through the state system of six (6) area regional career-technical schoolscolleges. Postsecondary programs are defined in

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Board Policy III.E and are reviewed by the Administrator. In accordance with Board Policy III.G., the Administrator shall meet with the Technical College Leadership Council (TCLC) on a regular basis. The area-regional technical schools-colleges are:

- i. College of Western Idaho (Nampa)
- ii. College of Southern Idaho ~~Career Technical School~~ (Twin Falls)
- iii. ~~Eastern Idaho Technical College~~ of Eastern Idaho (Idaho Falls)
- iv. Idaho State University College of Technology ~~Career Technical School~~ (Pocatello)
- v. Lewis-Clark State College ~~School of Technology~~ (Lewiston)
- vi. North Idaho College ~~Career Technical School~~ (Coeur d'Alene)

~~69.~~ Adult Workforce Training Programs: Are primarily provided through the six (6) area-regional career-technical schools-colleges to provide upgrading and retraining programs for persons in the work force and to support regional industry needs. ~~Some classes are offered by Idaho public high schools.~~ These offerings range from brief seminar classes to intensive courses which normally are ~~less~~ fewer than 500 hours of annual instruction.

~~10.~~ The Idaho Agricultural Education Quality Program Standards shall be used to evaluate the quality of Agricultural, Food and Natural Resource education programs. The Idaho Agricultural Education Quality Program Standards as approved August 14, 2014, are adopted and incorporated by reference into this policy. The standards may be found on the Division of Career Technical Education ~~Website~~ at <http://cte.idaho.gov>.

~~711.~~ Internal Policies and Procedures

The chief executive officer may establish additional policies and procedures for the internal management of the Division of Career Technical Education ~~which that~~ complement, but do not supplant, the Governing Policies and Procedures of the Board. Such internal policies and procedures are subject to Board review and action.

~~812.~~ Industry Partner Fund

In an effort to increase the capacity of each of Idaho's six public technical colleges to work with regional industry partners to provide a "rapid response to gaps in skills and abilities," Idaho has established the Industry Partner Fund. The purpose of the fund is to provide funds that give the technical colleges the flexibility to work with Idaho employers to provide "timely access to relevant college credit and non-credit training and support projects."

a. Definitions

- i. Technical College Leadership Council (TCLC) means the career technical education deans of Idaho's six public technical colleges
- ii. Wage threshold means evidence that training will lead to jobs that provide living wages appropriate to the local labor market or local standard of living.
- iii. Regional means the six defined career technical service regions pursuant to Board Policy III.Z.
- iv. Support project means supplemental items, activities, or components that may enhance program outcomes (such as job analysis, placement services, data collection and follow up, workplace readiness skills training, etc.)
- v. Regional industry partners means employers that operate in Idaho and/or serve as a talent pipeline for Idaho students and employees.
- vi. Impact potential means the extent to which the training or project will increase regional capacity to meet talent pipeline needs. May include number of students or employees affected, associated wages, and long-term regional improvement or sustainability. May also include the timeframe for implementation.
- vii. Demonstrated commitment means the promissory financial commitment made by the partner employer that includes cash or in-kind contribution to the project.

b. Roles and Responsibilities

The ~~Division of Career Technical Education~~ Administrator and TCLC are jointly responsible for reviewing and administering the application process for accessing Industry Partner Fund monies.

The TCLC, in accordance with the deadlines outlined in the following section, shall conduct the preliminary review of all proposals to ensure they meet the eligibility requirements and align with legislative intent. Each institution shall have one vote on the TCLC throughout the recommendation process. Deans shall not vote on proposals from their institution. The TCLC shall make recommendations to the division administrator to approve, deny, or modify submitted proposals.

The ~~division~~ Administrator shall review all eligible proposals and make the final determination on the award of those proposals.

The Division shall be responsible for management and distribution of all moneys associated with the fund.

c. Submission and Review Process

Proposals will be accepted quarterly, on a schedule set by the Division. The TCLC shall provide the ~~division~~ Administrator with recommendations on which proposals to award within 14 calendar days of the closing date of the application period. Pursuant to language outlined in Section 33-2213, Idaho Code, the TCLC

and the ~~division~~-Administrator will notify the technical college within 30 days of submission of their proposal as to whether their proposal was approved.

Submitted proposals must contain all required supporting documentation, as outlined by the ~~division~~-Administrator, the TCLC, and as specified in the application.

Proposals must be signed by the College Dean, Financial Vice President/Chief Fiscal Officer, Provost/Vice President for Instruction, and institution President.

Proposals must outline how the institution and industry partner(s) are unable to meet industry need with existing resources.

d. Eligibility Criteria

Each proposal will be reviewed and evaluated according to the following criteria:

- i. The extent to which the proposal meets regional demand
- ii. Relevant labor market information, which must include, but is not limited to, Idaho Short Term Projections (Idaho Department of Labor)
- iii. Wage thresholds – low wage program starts should be accompanied with appropriate justification including regional economic demand.
- iv. Impact potential
- v. Degree of employer commitment
- vi. The extent to which the proposal aligns with and/or supports career technical education programs and relevant workforce training
- vii. the anticipated administrative costs
- viii. any special populations that may benefit from the proposed education or training
- ix. sustainability of the program

Preference will be given to proposals that include:

- i. Multiple employers
- ii. Higher number of impacted workers
- iii. Demonstrated commitment (highest consideration will be given to proposals with a matching component)

Each college may submit more than one proposal per quarter. In the event a qualified proposal isn't selected in the quarter in which it was submitted, the proposal may be resubmitted the following quarter. Resubmission of an eligible proposal is not a guarantee of future awards.

e. Distribution and Use of Funds

The ~~division~~-Administrator, in awarding funds, shall ensure that funds are available each quarter. As such, the ~~division~~-Administrator may adjust or reduce the award amount to an accepted proposal. These adjustments or reductions shall

be made in consultation with the TCLC and the technical college impacted and will ensure the original intent of the proposal can still be met.

Funds will be distributed on a one-time basis; renewal proposals may be submitted, based on the nature of the project or training.

Industry Partner Fund moneys may be used for:

- i. Facility improvement/expansion
- ii. Facility leasing
- iii. Curriculum development
- iv. Salaries and benefits (if the training program needs are anticipated to go beyond the initial award, the college must provide additional details on long-term sustainability of the position filled through the fund)
- v. Staff development
- vi. Operating expenses
- vii. Equipment and supplies
- viii. Travel related to the project
- ix. Approved administrative costs, as outlined in the application

Funds may not be used for:

- i. Real property
- ii. indirect costs
- iii. the cost of transcribing credits
- iv. tuition and fees
- v. materials and equipment normally owned by a student or employee for use in the program or training

f. Performance Measures and Reporting Requirements

In accordance with the approved proposal, colleges shall provide a quarterly update and closeout report on elements such as:

- i. Number of affected workers
- ii. Number of enrolled or participating students
- iii. Placement rate of training completers
- iv. Average wages and any wage differential
- v. Industry match
- vi. If practicable, Idaho public college credits, certificates, certifications, qualifications or microcertifications of value toward postsecondary certificates or degrees.
- vii. Funds obligated and expended. Any funds not obligated within 18 months of the initial award shall revert back to the fund.

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SUBJECT

Policy V.Q. Residency for Tuition Purposes – Second Reading

REFERENCE

April 2019	Board received an update on impact of the legislature not extending codified rules after June 30, 2019.
May 2019	Board approved temporary and proposed rules for reinstatement due to 2019 legislative action and an update on which rules could be allowed to expire June 30, 2019.
June 2019	Board approved the first reading of new Board Policy V.Q. Residency for Tuition Purposes.

APPLICABLE STATUTE, RULE, OR POLICY

Section 33-3717B, Idaho Code

ALIGNMENT WITH STRATEGIC PLAN

GOAL 3: Educational Attainment, Objective C: Access.

BACKGROUND/DISCUSSION

Section 33-3717B, Idaho Code establishes residency requirements for tuition purposes at the University of Idaho, Boise State University, Idaho State University and Lewis-Clark State College. Administrative Code, IDAPA 08.01.04 (expired June 30, 2019) provided further clarification of the provisions set by Section 33-3717B, Idaho Code through the establishment of definitions and factors for determining domicile in Idaho, the process for students to submit a residency reclassification determination and a student appeals process.

Board Policy V.Q. re-establishes the student residency classification process, factors for determining domicile in Idaho, and the appeals process.

IMPACT

Approval of the first reading of proposed new Board Policy V.Q. Residency for Tuition Purposes will be the first step in re-establishing the existing requirements for evaluating student domicile for determining student residency for tuition purposes. This will provide consistency for those students that are already in the process of having their residency determined for the 2019-2020 school year.

ATTACHMENTS

Attachment 1 - V.Q. Residency for Tuition Purposes – Second Reading

STAFF COMMENTS AND RECOMMENDATIONS

No comments were received between the first and second reading. No additional amendments have been made.

Staff recommends approval.

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BOARD ACTION

I move to approve the second reading of new Board Policy V.Q. Residency for Tuition Purposes as provided in Attachment 1.

Moved by_____ Seconded by_____ Carried Yes____ No____

**Idaho State Board of Education
GOVERNING POLICIES AND PROCEDURES
SECTION: V. FINANCIAL AFFAIRS
SUBSECTION: Q. Residency for Tuition Purposes**

August 2019

Section 33-3717B, Idaho Code establishes residency requirements for tuition purposes at University of Idaho, Boise State University, Idaho State University and Lewis-Clark State College. When applying the provisions of Section 33-3717B, Idaho Code the institutions shall apply the following definitions and factors.

1. Definitions

- a. Accredited Secondary School. "Accredited Secondary School" means an Idaho secondary school accredited by a body recognized by the State Board of Education.
- b. Armed Forces. "Armed Forces" means the United States Army, Navy, Air Force, Marine Corps, Coast Guard, and their reserve forces. It does not include the National Guard or any other reserve force.
- c. Continuously Resided. "Continuously Resided" means physical presence in the state for twelve (12) consecutive months. Absence from the state for normal vacations, family travel, work assignments, short-term military training, and similar occasions during the twelve-month (12) qualifying period, in and of itself, will not be regarded as negating the continuous residence of the individual.
- d. Full-time Employment. "Full-time Employment" means employment consisting on average of at least thirty (30) hours of service per week, or one hundred twenty (120) hours of service per month.
- e. Full-time Student. "Full-time Student" means a student taking the number of credits set by the State Board of Education to constitute a full course load.
- f. Support. "Support" means financial support given to the student during the twelve (12) months preceding the opening date of the term for which resident status is requested, but shall not include educational scholarships or grants provided to the student to attend a postsecondary educational institution. Any student who receives less than fifty percent (50%) support may demonstrate this by showing that the student is not claimed as a dependent by a parent or guardian for income tax purposes.

2. Resident Classification by All Institutions

Any student classified as a resident student for purposes of tuition by one (1) of the institutions shall be considered a resident by all other institutions.

3. Residency Classification Process

All requests for residency reclassification must be submitted by the student to the institution by the 10th day of the term in which reclassification is sought. Each institution shall develop its own procedures to determine the residency status of applicants, disseminate information about the classification process, and determine the documentation required of each applicant to the institution. The institution may require whatever records, documents, or affidavits it deems necessary to classify each applicant correctly. It is the responsibility of the institution to notify the student in a timely manner of the documentation required for the classification process, and it is the responsibility of the student to provide the documentation by the deadline established by the institution. Each student shall be notified in writing of the residency classification decision within fifteen (15) days of such determination being made.

4. Factors for Determining Domicile

The following, if supported by documentation, support a claim of domicile in Idaho.

- a. Tax Returns and Employment. Both of the following, if done for at least twelve (12) months before the term in which the student proposes to enroll, proves the establishment and maintenance of domicile in Idaho for purposes other than educational:
 - i. Filing of Idaho state income tax returns covering a period of at least twelve (12) months before the term in which the student proposes to enroll as a resident student; and
 - ii. Full-time employment in Idaho.
- b. Multiple Factors. Five (5) of the following factors, if done for at least twelve (12) months before the term in which the student proposes to enroll, proves the establishment and maintenance of domicile in Idaho for purposes other than educational:
 - i. Ownership or leasing of a residence in Idaho.
 - ii. Registration and payment of Idaho taxes or fees, other than sales tax, including registration and payment of Idaho taxes or fees on a motor vehicle, mobile home, travel trailer, or other item of personal property for which state registration and the payment of state tax or fee is required.
 - iii. Registration to vote for state elected officials in Idaho at a general election.
 - iv. Holding of an Idaho driver's license or state-issued identification card.
 - v. Evidence of the abandonment of a previous domicile.
 - vi. The establishment of accounts with financial institutions in Idaho.
 - vii. Other similar factors indicating intent to be domiciled in Idaho and the maintenance of such domicile. Factors may include, but are not limited to, enrollment of dependent children in Idaho elementary or secondary

schools, establishment of acceptance of an offer of permanent employment for self in Idaho, documented need to care for a relative in Idaho, utility statements, or employment documentation. Multiple factors under this category may be used.

- c. Idaho Elementary and Secondary Students. If a student meets the requirements set forth under Idaho Code, Section 33-3717B(1)(c), that student shall not be required to meet the twelve (12) month requirement for establishing domicile.

5. Independent Students and Domicile

Domicile in the state of Idaho primarily for purposes other than education includes a domicile in Idaho that was established by the student prior to pursuing higher education in Idaho unless the student's Idaho domicile was thereafter interrupted by an intervening change of domicile.

6. Appeals Procedure

Any student who contests the residency classification decision made by the institution may appeal the decision. The student shall be informed of his right to appeal by the institution at the time the student is notified of the residency classification decision. The student must request the appeal in writing and agree to the release of information provided to determine residency to the review body, and comply with deadlines established by the institution for requesting such appeal.

- a. Institution Appeal. The chief executive officer of each institution or his designee shall appoint or cause to be appointed a committee of no less than three (3) no more than five (5) members who represent faculty and administration and who will constitute a residency review committee. Within thirty (30) days following receipt of the student's written request to appeal the residency classification decision, the committee must meet and review the ruling. The student appealing is responsible for presenting such evidence as the committee may request and such other evidence, as the student may deem pertinent to his residency status. The individual responsible for the initial residency classification decision may be present, if requested by the committee, to answer questions from the committee. The student must be notified in writing of the committee's decision. The decision of the committee is final unless the student elects to appeal the decision to the State Board of Education.
- b. Board Appeal. Any student who contests the decision of the residency review committee may appeal to the State Board of Education. In such case, the student must advise the chief executive officer of the institution, in writing, of his request to submit an appeal. The chief executive officer will submit the request to the Office of the State Board of Education for review by the Board or the Board's designated representatives. The decision of the State Board of Education is the final determination and is binding on all parties concerned, subject to the student's statutory right to appeal the final determination to district court.

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SUBJECT

2020 Proposed Legislation

REFERENCE

June 2018	The Board approved three (3) legislative ideas to be submitted through the Executive Agency Legislative process.
June 2019	The Board approved thirteen (13) legislative ideas to be submitted through the Executive Agency Legislative process.

ALIGNMENT WITH STRATEGIC PLAN

GOAL 3: EDUCATIONAL ATTAINMENT: Objective C: Access

GOAL 4: WORKFORCE READINESS: Objective A: Workforce Alignment

BACKGROUND/ DISCUSSION

The Board approved thirteen (13) legislative ideas at the June 2018 Board meeting. One (1) additional legislative idea was identified and authorized by the Executive Director for submittal through the Executive Agency Legislative process. The additional piece of legislation would allow the Board the discretion in releasing only three (3) finalist names in a university president search rather than the current requirement that the top five (5) finalist names be released.

Staff have received feedback from the Governor's Office that given consideration of what may come forward from the Governor's Our Kids, Idaho's Future Task Force, the Governor's Office would like the Board to limit the education related legislation that is run this year. Of the thirteen (13) total legislative ideas, five (5) have been approved to forward to the 2020 Legislative Session:

- Seed Certification (501-01)
- Professional Studies Loan Program Repeal (501-06)
- Educational Interpreter (501-07)
- Extended Employment Services Program (501-08)
- Postsecondary Institutions – Presidential Finalist List (501-14)

IMPACT

Staff will submit Board-approved legislative ideas through the executive agency legislative process and will bring back legislative language to the Board once approved by the Governor's Office. Legislative ideas not approved will not be submitted to through the executive agency legislative process and will not be sponsored by the Board for introduction to the legislature.

ATTACHMENTS

Attachment 1 – Legislative Ideas – Statement of Purpose and Fiscal Impact
Attachment 2 – Seed Certification
Attachment 3 – Professional Studies Loan Program Repeal
Attachment 4 – Educational Interpreter
Attachment 5 – Extended Employment Services Program
Attachment 6 – Postsecondary Institutions – Presidential Finalist List

STAFF COMMENTS AND RECOMMENDATIONS

The State Board of Education's legislative process starts with the approval of legislative ideas. Legislative ideas that are approved by the Board are submitted electronically to the Division of Financial Management (DFM) through the Executive Agency Legislative process. The next phase of the legislative approval process consists of the Board's approval of the actual legislative language, submittal of approved language to DFM for the Governor's consideration and then submittal to the Legislative Services Office for the language to be converted into a proposed bill. During this phase of the process, non-substantive changes made be made as staff work with the Governor's Office and Legislative Services on final bill drafting.

Attachment 1 provides a brief summary of each piece of legislation and the estimated fiscal impact.

Staff recommends approval.

BOARD ACTION

I move to approve the proposed legislation in substantial conformance to the form provided in Attachment 2 through 6 and to authorize the Executive Director to make additional changes as necessary as the legislation moves forward through the legislative process.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

LEGISLATIVE IDEAS

1. Seed Certification

Statement of Purpose

The purpose of this legislation is to amend Section 22-1505, Idaho Code, removing the requirement that the Idaho Agricultural Experiment Station in the College of Agriculture of the University of Idaho use the Administrative Rule process for setting standards for seed certification. The current process that allows for public/industry input in setting seed certification standards through the Idaho Crop Improvement Association, the current Agent of the Idaho Agricultural Experiment Station, would remain in place, however, the added formal rule promulgation process would be removed. Layering the formal rule promulgation process on top of the process that has been developed through the Idaho Crop Improvement Association has added a layer of bureaucracy and time lines that limits the ability to amend standards in a manner responsive to industry needs. The current framework for gathering stakeholder/industry input used by the Idaho Crop Improvement Association allows those that are impacted to be involved in the process through the Idaho Crop Improvement Association. Additionally, a thirty-day public comment period for the standards would be required prior to their establishment.

Fiscal Impact

There would be a de minimis positive fiscal impact. The current processes facilitated by the College of Agriculture and its agent the Idaho Crop Improvement Association would continue. The administrative rule process would be eliminated resulting in one less rule being published each year. The publication costs for this rule have run between \$500 and \$1,000 each year.

2. Professional Studies Loan Program Repeal

Statement of Purpose

The proposed legislation would repeal Section 33-3720, Idaho Code. This section of code establishes a loan program that is no longer administered and has not been funded in over a decade.

Fiscal Impact

There would be no fiscal impact. This program has not been funded in a number of years and is no longer administered.

3. Educational Interpreter

Statement of Purpose

Chapter 13, Title 33 establishes provisions for educational interpreters. Additionally, Chapter 29, Title 54 sets out licensing requirements for individuals providing interpreting services. Individuals who are providing interpreting services as education interpreters pursuant to the requirements in chapter 13, title 33, are exempt from the licensing requirements in chapter 29, title 54. To qualify for this exemption the individual is required to be interpreting in a kindergarten through grade 12 educational setting. School districts

provide educational services to students with disabilities that meet the definition of school age and fall outside of the kindergarten through grade 12 range. In these cases, school districts are required to hire a licensed interpreter at an increased cost. The proposed amendment would change the reference to grade ranges in the education interpreter provisions to the statutorily defined term of “school age.” This will allow for school district to use education interpreters for students that fall outside of the grade range while still meeting the school age definition. These students are students with disabilities that the school districts are required to provide services for through the Individuals with Disability Education Act.

Fiscal Impact

There would be no fiscal impact to the state. Interpreters are hired and funded at the local school level. The amendments could result in cost savings to the school district as educational interpreters are generally hired at a lower rate than licensed interpreters are.

4. Extended Employment Services Program (Submitted by the Division of Vocational Rehabilitation)

Statement of Purpose

The purpose of this legislation is to codify the Extended Employment Services (EES) Program. The legislation would statutorily establish the EES program with a twofold mission: (1) provide work skills training on a short-term bases for Idahoans with the Most Significant Disabilities for whom competitive integrated employment has not been successful due to the specific limitations of their disability or disabilities; and (2) serve Idahoans with the Most Significant Disabilities who require long term supports in order to maintain competitive integrated employment due to the specific limitations of their disability or disabilities. The legislation would further stipulate that the EES program supports Idahoans who are not otherwise eligible for any other public program funding, including Department of Health and Welfare Medicaid Waivers. In other words, the EES program would be the payer of last resort and would not supplant or duplicate any other public funding source.

Fiscal Impact

There would be no fiscal impact based on the FY20 EES program appropriation.

5. Postsecondary Institutions – Presidential Finalist List

Statement of Purpose

The proposed legislation would amend Section 74-106, Idaho Code to allow an exception for the public postsecondary institutions to the number of finalist names that are required to be released to the public when hiring for nonclassified positions. The amendment would reduce the number of required applicant names that must be released from five (5) to three (3). The requirement that the names of the five final applicants be released to the public has had a chilling effect on the applicants willing to apply for the chief executive officer (President) positions at the public postsecondary institutions. This caused some applicants to withdraw from the list of finalist during the recent Presidential searches.

Applicants were much more willing to be publicly announced if they were in the top three rather than the top five list of candidates.

Fiscal Impact

There could be a positive fiscal impact. The impact would be variable based on the applicant pool. Reducing the number of finalist that are brought in for campus visits and interviews would reduce the cost of president searches. There may be an additional indirect benefit if the amendments help to ensure a competitive pool of applicants for these positions.

Be It Enacted by the Legislature of the State of Idaho:

SECTION 1. That Section 22-1502, Idaho Code, be, and the same is hereby amended to read as follows:

22-1502. COMPLIANCE ~~WITH REGULATIONS~~ REQUIRED WHERE CERTAIN PHRASES USED. Every person, firm, association or corporation who shall issue, use or circulate, any certificate, advertisement, tag, seal, poster, letterhead, marking, circular, written or printed representation or description, of or pertaining to lots of seeds, tubers, plants or plant parts intended for propagation or sale, or sold or offered for sale wherein the words "Idaho State Certified," "State Certified," "Idaho Certified," or similar words or phrases are used or employed, or wherein are used or employed signs, symbols, maps, diagrams, picture words or phrases expressly or impliedly stating or representing that such seed, tubers, plants or plant parts comply with or conform to the standards ~~or~~ and requirements approved by the Idaho agricultural experiment station in the college of agriculture of the university of Idaho shall be subject to the provisions of this chapter.

SECTION 2. That Section 22-1503, Idaho Code, be, and the same is hereby amended to read as follows:

22-1503. DEFINITIONS. (1) "Breeder seed" means seed or vegetative propagating material directly controlled by the originating, or in certain cases the sponsoring plant breeder or institution, and which provides the source for the initial increase of foundation seed.

(2) "Certified" means the written assurance, in certificate form, of the college of agriculture of the university of Idaho, or of its agent designated hereunder, that the particular seeds, tubers, plants or plant parts have the necessary genetic purity of strain and/or other characteristics to meet the standards and requirements ~~of the rules and regulations promulgated approved~~ hereunder. Certification by the certifying agent or college of agriculture of the university of Idaho, or its agent, or state of Idaho does not constitute any warranty that certified seeds, tubers, plants or plant parts will be free from disease or contamination.

(3) "Foundation seed" means the progeny of breeder seed stocks that are so handled as to maintain specific genetic identity and purity, and that are designated or distributed by the Idaho agricultural experiment station or private companies.

(4) "Genetic purity" means that the lot of seeds, tubers, plants or plant parts are homogenous for inheritable characteristics as stated in the official description of the variety or strain represented.

(5) "Lot" means a definite quantity of seed identified by a lot number or other mark, every portion or bag of which is uniform within recognized tolerances for the factors which appear in the labeling.

(6) "Plant" or "tubers" or "plants" or "plant parts" mean any variety or strain of plant or part thereof which may be eligible for certification, as hereinafter provided.

(7) "Seed" or "seeds" mean the seed of any variety or strain of plant, including tubers, which may be eligible for certification, as hereinafter provided.

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(8) "Variety or strain" means a subdivision of a kind characterized by growth, yield, plant, fruit, seed, or other characteristics, by which it can be differentiated from other plants of the same kind.

SECTION 3. That Section 22-1504, Idaho Code, be, and the same is hereby amended to read as follows:

22-1504. ADMINISTRATION OF THE CHAPTER. The regents of the university of Idaho through the Idaho agricultural experiment station in the college of agriculture of the university of Idaho, or the agent of the university of Idaho, an entity or servant of the state, appointed in writing, as hereinafter provided, is hereby authorized to administer the provisions of this chapter to establish, alter, amend and repeal, ~~in compliance with the provisions of chapter 52, title 67, Idaho Code,~~ reasonable rules and regulations standards and requirements as to what shall constitute certified seeds, tubers, plants and plant parts under the terms of this chapter. Such reasonable rules and regulations standards and requirements shall also comprehend and fix the standards and requirements necessary to qualify seeds, tubers, plants and plant parts for certification hereunder and the procedures for certification by the said college of agriculture or the said agent thereof. All varieties or strains of seed, tubers, plants and plant parts eligible for certification in the state of Idaho shall be approved by the director of the Idaho agricultural experiment station. Any agent designated hereunder shall be a servant of the state of Idaho and shall be acting in an official capacity for the state of Idaho and under the supervision of the college of agriculture of the university of Idaho and the director of the Idaho experiment station consistent with this chapter.

SECTION 4. That Section 22-1505, Idaho Code, be, and the same is hereby amended to read as follows:

22-1505. RULES AND REGULATIONS STANDARDS AND REQUIREMENTS — PREPARATION AND PROMULGATION. Every person, firm, association or corporation that intends to offer for sale, offers or sells seeds, tubers, plants or plant parts as certified shall comply with the provisions of this chapter and such rules and regulations standards and requirements as are promulgated by the Idaho agricultural experiment station in the college of agriculture of the university of Idaho as provided herein, such rules and regulations standards and requirements to contain, among other things, a designation of the crops grown or to be grown in Idaho eligible for certification with standards, requirements and procedure necessary for certification with designation of the agency authorized to provide certification.

Upon the passage of this chapter the Idaho agricultural experiment station in the college of agriculture of the university of Idaho shall prepare and issue ~~such rules and regulations standards, requirements and procedures~~ as are required by this chapter ~~in compliance with the provisions of chapter 52, title 67, Idaho Code,~~ Such standards and requirements shall be made publicly available for review and public comment for a period of not less than thirty (30) days prior to their establishment. At the close of the public comment period the standards and requirements shall be filed with the college of agriculture of the university of Idaho, such standards and requirements shall become

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effective thirty (30) days from the date the same are filed with the college of agriculture of the university of Idaho.

SECTION 5. That Section 22-1506, Idaho Code, be, and the same is hereby amended to read as follows:

22-1506. FEES CHARGED BY CERTIFYING AGENCY. Fees may be charged by the certifying agency, under schedules set forth in rules and regulations standards, requirements and procedures for certification of seeds, tubers, plants and plant parts under this chapter, but these fees shall have a reasonable relation to the cost, and may be used only for expenses in connection with certification and improvement of certification services.

SECTION 6. That Section 22-1507, Idaho Code, be, and the same is hereby amended to read as follows:

22-1507. MAINTENANCE OF SEED STOCKS. The Idaho agricultural experiment station or an agent of the university of Idaho appointed, in writing, shall be responsible to obtain and maintain sources of basic seed stocks which include breeder class and foundation class seed of public varieties or strains of crops deemed appropriate by the director of the Idaho agricultural experiment station. Basic seed stocks, limited generation certified seed tubers, plant or plant parts shall first be made available for production in Idaho. This shall be accomplished through a system of equitable allocation to any person, firm, partnership, association, corporation or entity located in this state unless a contract or agreement entered into with another public research entity or institution provides otherwise. Price established for the basic seed stocks of seed, tubers, plants or plant parts shall be in reasonable relation to the cost of production, maintenance, handling, storage and processing necessary to meet standards set forth in the rules and regulations standards and requirements.

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ATTACHMENT 3

Be It Enacted by the Legislature of the State of Idaho:

SECTION 1. That Section 33-3720, Idaho Code, be, and the same is hereby repealed.

~~33-3720. PROFESSIONAL STUDIES PROGRAM. (1) It is hereby declared that it is in the public interest to assist Idaho citizens who wish to pursue professional studies in the fields of medicine, dentistry, veterinary medicine, and other health related areas of study which are not available within the state by (a) entering into compacts or contractual agreements which make such courses of study available to Idaho citizens, and (b) providing a mechanism to provide funds for such Idaho citizens.~~

~~(2) The state board of education is hereby authorized to enter into loan agreements with qualified recipients to participate in qualified programs, which agreements shall include provisions for repayment of the loan on terms agreed to by the board and the qualified recipient; such repayment agreements may include provisions for decreasing or delaying or forgiving the repayment obligation in relationship to the recipient's course of study or agreement to return to Idaho to practice professionally.~~

~~(a) A qualified recipient shall be any Idaho student accepted into a qualified program who meets the residency requirements imposed by section 33-3717B, Idaho Code, and the rules of the state board of education.~~

~~(b) A qualified program shall be a program enumerated in section 33-3717B(7), Idaho Code, and any other medical, dental, veterinary medicine, or other health related program in which participation by Idaho residents has been authorized by the legislature and for which funds have been obligated by the board pursuant to subsection (3) of this section.~~

~~(3) The state board of education is hereby authorized to transfer, distribute or pay such moneys as are available in the professional studies account to the school, program, or compact providing the course of study pursuant to contracts, agreements, or compacts entered into by the legislature or the state board of education.~~

~~(4) The state board of education is hereby authorized to adopt all necessary rules, subject to the provisions of chapter 52, title 67, Idaho Code, for the administration of the professional studies program.~~

33-1304. QUALIFICATION OF EDUCATIONAL INTERPRETERS. (1) Except as provided in this section, no person shall act as an educational interpreter in an Idaho public school unless the person has been qualified to do so. The person shall be qualified if the person:

(a) Has achieved a score of 3.5 or higher on the educational interpreter performance assessment or has achieved a comparable score on an equivalent test as determined by the bureau; or

(b) Is currently certified by:

(i) The registry of interpreters for the deaf;

(ii) The national association of the deaf at a level of III or higher;

(iii) The registry of interpreters for the deaf, oral transliteration for oral transliterators; or

(iv) The testing, evaluation, and certification unit for cued language transliterators.

(2) An educational interpreter currently employed in an Idaho public school may continue in the practice of educational interpreting without meeting the requirements of subsection (1) of this section, provided that such requirements are met on or before June 30, 2009.

(3) Effective July 1, 2009, newly-hired educational interpreters, who have not worked in an Idaho public school as an educational interpreter in kindergarten through grade twelve (12) prior to the enactment of this chapter, may apply in writing to the bureau for emergency authorization to work as an educational interpreter for two (2) years before being required to meet the requirements of subsection (1) of this section. An educational interpreter who has received an emergency authorization under this subsection (3) may apply in writing to the bureau for a one-time, one (1) year extension of the emergency authorization. The bureau may grant such a one (1) year extension of the emergency authorization for good cause shown.

(4) A graduate of an interpreter education program may serve as an educational interpreter in Idaho public schools, kindergarten through grade twelve (12) school age children, pursuant to section 33-201, Idaho Code, before meeting the requirements of subsection (1) of this section for one (1) year following such graduation.

(5) Educational interpreters employed by an Idaho public school in kindergarten through grade twelve (12) must complete a minimum of eighty (80) hours of training in the areas of interpreting or transliterating every five (5) years. This training must be documented and may include home study coursework, seminars, workshops and mentoring programs.

(6) The board is authorized to promulgate rules necessary to implement this chapter.

SECTION 1: That Chapter 23, Title 33, Idaho Code, be, and the same is hereby amended by the addition thereto of a NEW SECTION, to be known and designated as Section 33-2309, Idaho Code, and to read as follows:

33-2309. EXTENDED EMPLOYMENT SERVICES PROGRAM

(1) There is hereby created the Idaho extended employment services program for the purpose of assisting individuals to develop skills necessary to achieve and maintain competitive integrated employment.

(2) The program shall provide services that are either long-term job coaching services or short-term training services based on the needs of an eligible individual, as specified in an individualized program plan for employment.

(a) Long-term job coaching services shall be:

(i) Needed to support and maintain competitive integrated employment for an individual with a most significant disability, or a youth with a most significant disability, in supported employment; and

(ii) Provided after the individual has received vocational rehabilitation services; or

(iii) Organized or made available, singly or in combination, in such a way as to assist an eligible individual in maintaining supported employment.

(b) Short-term training services shall be:

(i) Needed to obtain employment skills necessary for an individual to either become eligible for vocational rehabilitation services or to become a competitive applicant for competitive integrated employment and may be delivered in a nonintegrated setting; and

(ii) Organized or made available, singly or in combination, in such a way as to assist an eligible individual in obtaining or increasing work skills necessary for that individual to benefit from vocational rehabilitation services and competitive integrated employment.

(c) The services provided by the extended employment services program shall only be provided when individuals do not have access to comparable services or have fully utilized comparable services they are eligible for.

(d) The services provided by the extended employment services program shall be separate from and delivered subsequent to vocational rehabilitation services, as defined in 29 U.S.C. § 705(40), provided by the Idaho Division of Vocational Rehabilitation.

(3) The extended employment services program shall be administered by the

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Idaho Division of Vocational Rehabilitation. Program services may be provided by another state agency, private nonprofit, private for profit, employer, or any other appropriate resource.

(4) The Idaho Division of Vocational Rehabilitation may periodically review participant's eligibility for the extended employment services program.

(5) In order to provide extended employment services, the board for career technical education may enter into, or authorize a state agency over which it has oversight to enter into, agreements with any person, corporation or association, approved by the board for career technical education to provide such services.

(6) The State Board of Education shall have the authority to promulgate rules necessary to implement and administer the Idaho extended employment services program.

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74-106. RECORDS EXEMPT FROM DISCLOSURE — PERSONNEL RECORDS, PERSONAL INFORMATION, HEALTH RECORDS, PROFESSIONAL DISCIPLINE. The following records are exempt from disclosure:

(1) Except as provided in this subsection, all personnel records of a current or former public official other than the public official's public service or employment history, classification, pay grade and step, longevity, gross salary and salary history, including bonuses, severance packages, other compensation or vouchered and unvouchered expenses for which reimbursement was paid, status, workplace and employing agency. All other personnel information relating to a public employee or applicant including, but not limited to, information regarding sex, race, marital status, birth date, home address and telephone number, social security number, driver's license number, applications, testing and scoring materials, grievances, correspondence and performance evaluations, shall not be disclosed to the public without the employee's or applicant's written consent. Names of applicants to classified or merit system positions shall not be disclosed to the public without the applicant's written consent. Disclosure of names as part of a background check is permitted. Names of the five (5) final applicants ~~to all other positions shall be available to the public, or the three (3) final applicants for university president positions, shall be available to the public.~~ If such group is less than five (5) finalists or three (3) for university president positions, then the entire list of applicants shall be available to the public. A public official or authorized representative may inspect and copy his personnel records, except for material used to screen and test for employment.

(2) Retired employees' and retired public officials' home addresses, home telephone numbers and other financial and nonfinancial membership records; active and inactive member financial and membership records and mortgage portfolio loan documents maintained by the public employee retirement system. Financial statements prepared by retirement system staff, funding agents and custodians concerning the investment of assets of the public employee retirement system of Idaho are not considered confidential under this chapter.

(3) Information and records submitted to the Idaho state lottery for the performance of background investigations of employees, lottery retailers and major procurement contractors; audit records of lottery retailers, vendors and major procurement contractors submitted to or performed by the Idaho state lottery; validation and security tests of the state lottery for lottery games; business records and information submitted pursuant to sections 67-7412(8) and (9) and 67-7421(8) and (9), Idaho Code, and such documents and information obtained and held for the purposes of lottery security and investigative action as determined by lottery rules unless the public interest in disclosure substantially outweighs the private need for protection from public disclosure.

(4) Records of a personal nature as follows:

(a) Records of personal debt filed with a public agency or independent public body corporate and politic pursuant to law;

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(b) Personal bank records compiled by a public depositor for the purpose of public funds transactions conducted pursuant to law;

(c) Records of ownership of financial obligations and instruments of a public agency or independent public body corporate and politic, such as bonds, compiled by the public agency or independent public body corporate and politic pursuant to law;

(d) Records, with regard to the ownership of, or security interests in, registered public obligations;

(e) Vital statistics records; and

(f) Military records as described in and pursuant to section [65-301](#), Idaho Code.

(5) Information in an income or other tax return measured by items of income or sales, which is gathered by a public agency for the purpose of administering the tax, except such information to the extent disclosed in a written decision of the tax commission pursuant to a taxpayer protest of a deficiency determination by the tax commission, under the provisions of section [63-3045B](#), Idaho Code.

(6) Records of a personal nature related directly or indirectly to the application for and provision of statutory services rendered to persons applying for public care for people who are elderly, indigent or have mental or physical disabilities, or participation in an environmental or a public health study, provided the provisions of this subsection making records exempt from disclosure shall not apply to the extent that such records or information contained in those records are necessary for a background check on an individual that is required by federal law regulating the sale of firearms, guns or ammunition.

(7) Employment security information, except that a person may agree, through written, informed consent, to waive the exemption so that a third party may obtain information pertaining to the person, unless access to the information by the person is restricted by subsection (3)(a), (3)(b) or (3)(d) of section [74-113](#), Idaho Code. Notwithstanding the provisions of section [74-113](#), Idaho Code, a person may not review identifying information concerning an informant who reported to the department of labor a suspected violation by the person of the employment security law, [chapter 13, title 72](#), Idaho Code, under an assurance of confidentiality. As used in this section and in [chapter 13, title 72](#), Idaho Code, "employment security information" means any information descriptive of an identifiable person or persons that is received by, recorded by, prepared by, furnished to or collected by the department of labor or the industrial commission in the administration of the employment security law.

(8) Any personal records, other than names, business addresses and business phone numbers, such as parentage, race, religion, sex, height, weight, tax identification and social security numbers, financial worth or medical condition submitted to any public agency or independent public body corporate and politic pursuant to a statutory requirement for licensing, certification, permit or bonding.

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(9) Unless otherwise provided by agency rule, information obtained as part of an inquiry into a person's fitness to be granted or retain a license, certificate, permit, privilege, commission or position, private association peer review committee records authorized in [title 54](#), Idaho Code. Any agency that has records exempt from disclosure under the provisions of this subsection shall annually make available a statistical summary of the number and types of matters considered and their disposition.

(10) The records, findings, determinations and decisions of any prelitigation screening panel formed under chapters 10 and 23, [title 6](#), Idaho Code.

(11) Complaints received by the board of medicine and investigations and informal proceedings, including informal proceedings of any committee of the board of medicine, pursuant to [chapter 18, title 54](#), Idaho Code, and rules adopted thereunder.

(12) Records of the department of health and welfare or a public health district that identify a person infected with a reportable disease.

(13) Records of hospital care, medical records, including prescriptions, drug orders, records or any other prescription information that specifically identifies an individual patient, prescription records maintained by the board of pharmacy under sections [37-2726](#) and [37-2730A](#), Idaho Code, records of psychiatric care or treatment and professional counseling records relating to an individual's condition, diagnosis, care or treatment, provided the provisions of this subsection making records exempt from disclosure shall not apply to the extent that such records or information contained in those records are necessary for a background check on an individual that is required by federal law regulating the sale of firearms, guns or ammunition.

(14) Information collected pursuant to the directory of new hires act, [chapter 16, title 72](#), Idaho Code.

(15) Personal information contained in motor vehicle and driver records that is exempt from disclosure under the provisions of [chapter 2, title 49](#), Idaho Code.

(16) Records of the financial status of prisoners pursuant to subsection (2) of section [20-607](#), Idaho Code.

(17) Records of the Idaho state police or department of correction received or maintained pursuant to section [19-5514](#), Idaho Code, relating to DNA databases and databanks.

(18) Records of the department of health and welfare relating to a survey, resurvey or complaint investigation of a licensed nursing facility shall be exempt from disclosure. Such records shall, however, be subject to disclosure as public records as soon as the facility in question has received the report, and no later than the fourteenth day following the date that department of health and welfare representatives officially exit the facility pursuant to federal regulations. Provided however, that for purposes of confidentiality, no record shall be released under this section that specifically identifies any nursing facility resident.

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(19) Records and information contained in the registry of immunizations against childhood diseases maintained in the department of health and welfare, including information disseminated to others from the registry by the department of health and welfare.

(20) Records of the Idaho housing and finance association (IHFA) relating to the following:

(a) Records containing personal financial, family, health or similar personal information submitted to or otherwise obtained by the IHFA;

(b) Records submitted to or otherwise obtained by the IHFA with regard to obtaining and servicing mortgage loans and all records relating to the review, approval or rejection by the IHFA of said loans;

(c) Mortgage portfolio loan documents;

(d) Records of a current or former employee other than the employee's duration of employment with the association, position held and location of employment. This exemption from disclosure does not include the contracts of employment or any remuneration, including reimbursement of expenses, of the executive director, executive officers or commissioners of the association. All other personnel information relating to an association employee or applicant including, but not limited to, information regarding sex, race, marital status, birth date, home address and telephone number, applications, testing and scoring materials, grievances, correspondence, retirement plan information and performance evaluations, shall not be disclosed to the public without the employee's or applicant's written consent. An employee or authorized representative may inspect and copy that employee's personnel records, except for material used to screen and test for employment or material not subject to disclosure elsewhere in the Idaho public records act.

(21) Records of the department of health and welfare related to child support services in cases in which there is reasonable evidence of domestic violence, as defined in [chapter 63, title 39](#), Idaho Code, that can be used to locate any individuals in the child support case except in response to a court order.

(22) Records of the Idaho state bar lawyer assistance program pursuant to [chapter 49, title 54](#), Idaho Code, unless a participant in the program authorizes the release pursuant to subsection (4) of section [54-4901](#), Idaho Code.

(23) Records and information contained in the time sensitive emergency registry created by [chapter 20, title 57](#), Idaho Code, together with any reports, analyses and compilations created from such information and records.

(24) Records contained in the court files, or other records prepared as part of proceedings for judicial authorization of sterilization procedures pursuant to [chapter 39, title 39](#), Idaho Code.

(25) The physical voter registration application on file in the county clerk's office; however, a redacted copy of said application shall be made available consistent with the requirements of this section. Information from the voter registration application maintained in the statewide voter registration database, including age, will be made available except for the voter's driver's license number, date of birth and, upon a showing that the voter comes within

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the provisions of subsection (30) of this section or upon showing of good cause by the voter to the county clerk in consultation with the county prosecuting attorney, the physical residence address of the voter. For the purposes of this subsection, good cause shall include the protection of life and property and protection of victims of domestic violence and similar crimes.

(26) File numbers, passwords and information in the files of the health care directive registry maintained by the secretary of state under section [39-4515](#), Idaho Code, are confidential and shall not be disclosed to any person other than to the person who executed the health care directive or the revocation thereof and that person's legal representatives, to the person who registered the health care directive or revocation thereof, and to physicians, hospitals, medical personnel, nursing homes, and other persons who have been granted file number and password access to the documents within that specific file.

(27) Records in an address confidentiality program participant's file as provided for in [chapter 57, title 19](#), Idaho Code, other than the address designated by the secretary of state, except under the following circumstances:

(a) If requested by a law enforcement agency, to the law enforcement agency; or

(b) If directed by a court order, to a person identified in the order.

(28) Except as otherwise provided by law relating to the release of information to a governmental entity or law enforcement agency, any personal information including, but not limited to, names, personal and business addresses and phone numbers, sex, height, weight, date of birth, social security and driver's license numbers, or any other identifying numbers and/or information related to any Idaho fish and game licenses, permits and tags unless written consent is obtained from the affected person.

(29) Documents and records related to alternatives to discipline that are maintained by the Idaho board of veterinary medicine under the provisions of section [54-2118](#)(1)(b), Idaho Code, provided the requirements set forth therein are met.

(30) The Idaho residential street address and telephone number of an eligible law enforcement officer and such officer's residing household member(s) as provided for in [chapter 58, title 19](#), Idaho Code, except under the following circumstances:

(a) If directed by a court order, to a person identified in the court order;

(b) If requested by a law enforcement agency, to the law enforcement agency;

(c) If requested by a financial institution or title company for business purposes, to the requesting financial institution or title company; or

(d) If the law enforcement officer provides written permission for disclosure of such information.

(31) All information exchanged between the Idaho transportation department and insurance companies, any database created, all information contained in the verification system and all reports,

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responses or other information generated for the purposes of the verification system, pursuant to section [49-1234](#), Idaho Code.

(32) Nothing in this section shall prohibit the release of information to the state controller as the state social security administrator as provided in section [59-1101A](#), Idaho Code.

(33) Personal information including, but not limited to, property values, personal and business addresses, phone numbers, dates of birth, social security and driver's license numbers or any other identifying numbers or information maintained by the administrator of the unclaimed property law set forth in [chapter 5, title 14](#), Idaho Code. Nothing in this subsection shall prohibit the release of names, last known city of residence, property value ranges and general property information by the administrator for the purpose of reuniting unclaimed property with its owner.

(34) Any personal information collected by the secretary of state, pursuant to section [67-906](#)(1)(b), Idaho Code, for the purpose of allowing individuals to access the statewide electronic filing system authorized in section [67-906](#), Idaho Code, and any notification e-mail addresses submitted as part of a lobbyist's registration under section [67-6617](#), Idaho Code, of an employer, client, or designated contact for the purpose of electronic notification of that employer, client, or designated contact of a report filed under section [67-6619](#), Idaho Code.

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IDAHO DIVISION OF VOCATIONAL REHABILITATION

SUBJECT

Temporary Rule Docket 47-0101-1901, Rules of the Idaho Division of Vocational Rehabilitation

REFERENCE

November 2017 Board approved pending rule amendments to IDAPA 47.01.01.

APPLICABLE STATUTE, RULE, OR POLICY

Sections 33-3717 and 33-2303, Idaho Code

ALIGNMENT WITH STRATEGIC PLAN

Goal 3, Workforce Readiness, Objective A: Workforce Alignment

BACKGROUND/DISCUSSION

Idaho Administrative Code, IDAPA 47.01.01, was allowed to expire June 30, 2019. The Division's Field Service Manual ("manual") contains internal processes to the Division as well as eligibility and program requirements for the people and agencies the Division serves. When a document is incorporated by reference into administrative rule it has the force and effect of law and can only be changed through Board approval and the rulemaking process. Starting in 2015, the Division began the process of identifying areas that belong in the manual versus those areas that more appropriately belong in administrative rule with the end goal of removing the Field Services Manual from Administrative Code altogether. IDAPA 47.01.01 expired on June 30, 2019. This provided the Division with an opportunity to conduct a whole scale rewrite of the rule, completely removing the Field Service Manual and allowing language and terminology to be updated and rearranged all at one time.

IMPACT

The Division does not anticipate any fiscal impact from the approval of these temporary rules. The rules will provide general program requirements and service delivery guidance and expectations for individuals with disabilities who apply for and are determined eligible for program services based on current practices and federal requirements.

ATTACHMENTS

Attachment 1 – Temporary Rule Docket 47-0101-1901

STAFF COMMENTS AND RECOMMENDATIONS

Due to the complete rewrite and organization of the requirements the temporary rule is being brought forward to the Board as an entirely new rule. The requirements within the rule are those required by the Rehabilitation Act of 1973,

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as amended by the Workforce Innovation and Opportunity Act (WIOA). Provision contained in the rule include: formal and informal review processes, referral and application for services processes, and order of selection criteria.

Administrative rules are made up of three types of rules. Temporary rules, proposed rules and pending rules. Temporary and proposed rules may be promulgated jointly with a single docket number or temporary rules may be promulgated as a standalone rule. A rule must go through the proposed rule and pending rule steps to become a final rule. Temporary rules go into effect at the time of Board approval unless an alternative effective date is specified by Board action. To qualify as a temporary rule, the rule must meet one of three criteria:

- provides protection of the public health, safety, or welfare; or
- is to come into compliance with deadlines in amendments to governing law or federal programs; or
- is conferring a benefit.

Temporary rules that are approved prior to the start of a legislative session expire at the end of that legislative session unless action is taken by the legislature to extend the rule. The legislature does not see temporary rules unless there is a request for an extension.

The Division of Vocational Rehabilitation is bringing forward a temporary rule that complies with the federal requirements for vocational rehabilitation services. Additional work is being done with various stakeholder groups to bring back a proposed rule during the 2020-2021 negotiated rulemaking cycle that would go through the proposed and pending rule stages and be forwarded to the Legislature in 2021 for consideration.

BOARD ACTION

I move to approve Temporary Rule Docket No. 47-0101-1901 as submitted in Attachment 1.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

IDAPA 47

TITLE 01

CHAPTER 01

IDAPA 47 - DIVISION OF VOCATIONAL REHABILITATION

47.01.01 – RULES OF THE IDAHO DIVISION OF VOCATIONAL REHABILITATION

000. LEGAL AUTHORITY.

Section 33-2301, Idaho Code and the Rehabilitation Act of 1973, as amended by the Workforce Innovation and Opportunity Act (WIOA).

001. TITLE AND SCOPE.

01. Title. The title of this chapter is IDAPA 47.01.01, “Rules of the Idaho Division of Vocational Rehabilitation.”

02. Scope. The provision of these rules is to establish the program requirements and to implement program changes necessitated by the Rehabilitation Act of 1973, as amended by WIOA.

002. WRITTEN INTERPRETATIONS.

Written interpretations to these rules may be available from the Idaho Division of Vocational Rehabilitation. Other agency guidance documents, as well as agency policy statements of interpretations not rising to legal effect of a rule, if any, are available for inspection at the agency during regular business hours.

003. ADMINISTRATIVE APPEALS.

Administrative appeals are governed by Section 100 of these rules in accordance with 34 CFR Part 361.57.

004. INCORPORATION BY REFERENCE.

01. Documents Incorporated by Reference. No Documents are incorporated by reference.

005. OFFICE – OFFICE HOURS – MAILING ADDRESS AND STREET ADDRESS.

The principal place of business of the Idaho Division of Vocational Rehabilitation is in Boise, Idaho. The office is located at 650 W. State Street, Room 150, Boise, Idaho 83720. The hours of operation are 8 a.m. to 5 p.m., Mountain Time, Monday through Friday, except holidays designated by the State of Idaho. The telephone number is, (208) 334-3390, the facsimile number is (208) 334-5305 and the internet website address is <http://www.vr.idaho.gov>.

006. PUBLIC RECORDS ACT COMPLIANCE AND CONFIDENTIALITY OF RECORDS.

This rule is subject to and in compliance with the Public Records Act, Title 74, Chapter 1,

Idaho Code.

01. Confidential Records. All personal information concerning THE DIVISION customers is confidential. The information is used only for purposes directly connected to the administration of Vocational Rehabilitation services, and may not be released without the informed, written consent of the customer, except as otherwise provided by law.

007. – 009. (RESERVED).

010. DEFINITIONS.

01. Authorization for Purchase. A purchase order issued on behalf of the Division.

02. Customer. Any individual who has applied for or is eligible for vocational rehabilitation services.

03. Division. The Idaho Division of Vocational Rehabilitation.

04. State Administrator. The Chief Executive Officer of the Idaho Division of Vocational Rehabilitation.

011. ABBREVIATIONS.

01. AFP. Authorization for Purchase.

02. CAP. Client Assistance Program.

03. CFR. Code of Federal Regulations.

05. IPE. Individualized Plan for Employment.

06. VRC. Vocational Rehabilitation Counselor.

07. WIOA. Workforce Innovation and Opportunity Act

012. – 099. (RESERVED).

100. CUSTOMER APPEALS.

In accordance with 34 CFR Part 361.57, the customer appeals process is governed by Section 103 of these rules.

101. INFORMAL REVIEW PROCESS.

An informal review process is an option available to the customer as a method to resolve disagreements or dissatisfaction with the provision of services. An individual must request an informal review within twenty-one (21) calendar days of the agency notice regarding the provision or denial of services that are in question. The request must be in writing to the regional manager. The request must describe the complaint. The regional manager will function as the administrative review officer in the informal review process. At the customer's request, another regional manager may be substituted. The reviewer will be responsible for:

01. Advising the Customer. Advising the customer of his right to have a

representative present and encouraging the customer to use the services of Client Assistance Program (CAP).

02. Conducting the Review. Conducting the review within fifteen (15) calendar days following receipt of a written request for such a review, unless both parties agree upon an extension.

03. Documented Effort. Extending the time allowed for conducting an information review accordingly, when the customer makes a documented effort to utilize CAP or another advocate to resolve the dissatisfaction.

04. Review Location. Holding the review at a time and place convenient to the customer, generally at the local Division branch office.

05. Communication Method. Provide communication using appropriate methods for those customers who have a sensory impairment. Providing an interpreter for those customers who cannot communicate in English.

06. Transportation. Provide transportation to and from the review site, if needed.

07. Written Proposal. Resolve the matter to the satisfaction of the customer, developing a written proposal with the customer at the conclusion of the appeal process. Results of the written proposal are binding for the division unless the proposal is not permitted by law. The customer may reject the proposal and request a fair hearing within ten (10) calendar days of the informal review proposal or sixty (60) calendar days of the original agency decision, whichever comes later.

102. MEDIATION.

Mediation is an alternate dispute resolution method available to applicants and eligible customers who have initiated the formal appeals process.

01. Timeline. A customer must request mediation within twenty (20) calendar days of the original decision or ten (10) calendar days following the written proposal from the informal review. Mediation is available to a customer when an informal review has not resolved the dispute to the satisfaction of the customer.

02. Written Request. Requests for mediation must be made in writing to the field services chief and must clearly state the reason for dissatisfaction with the decision or results of the informal review. The chief of field services will represent the Division or assign a member of the administrative or supervisory staff who has not participated in the agency action that created the customer's dissatisfaction.

03. Participation. Participation in the mediation process is voluntary on the part of the customer and on the part of the Division. Either party may reject mediation as an alternate dispute resolution method. Once mediation has been accepted as an alternate

dispute resolution method, either party may terminate the mediation process.

04. Fair Hearing. Mediation may not be used to deny or delay the customer's right to pursue a fair hearing. Should the customer and/or designated representative select mediation in lieu of a fair hearing the option for a fair hearing will be extended to allow the results of the mediation to be established. Once the final results of the mediation are determined, the customer retains the right to request a fair hearing.

05. Mediator. All mediation is conducted by a qualified and impartial mediator who is selected randomly from a list of mediators maintained by the Division.

06. Confidentiality. Mediation discussions are confidential and may not be used as evidence in a fair hearing. Both parties at the beginning of the mediation process will sign a confidentiality agreement.

07. Mediation Agreement. The mediator will develop a written mediation agreement if an agreement between the parties is reached. The agreement must be signed by the customer, the mediator, and the Division designated representative.

08. Cost. Cost of mediation is paid by the Division. The Division is not required to pay for any cost related to the representation of a customer.

103. FAIR HEARING PROCESS.

The fair hearing process is an option available to any customer who is dissatisfied with any determination made by personnel of the Division that affects the provisions of vocational rehabilitation services. A customer may request a fair hearing immediately without having to go through any other appeal steps. A customer may request, or if appropriate may request through the customer's representative, a timely review of the determination. Such request must be made within sixty (60) days of the Division decision resulting in the initial disagreement or within ten (10) calendar days of the conclusion of the informal review or mediation process, whichever is later. The fair hearing process shall include a fair hearing conducted by a fair hearing officer.

01. Procedure. A fair hearing is a procedure whereby a customer who is dissatisfied with any determination concerning the provision or denial of Division services or the findings of the informal review or mediation may seek a determination of agency action before a fair hearing officer.

02. Written Request. Requests for a fair hearing must be sent in writing to the chief of field services and clearly state the customer's dissatisfaction with the agency's decision.

03. Timeline. The hearing shall be conducted within sixty (60) calendar days of receipt of the individual's request for review, unless informal resolution is achieved prior to the 60th day, or both parties agree to a specific extension of time.

04. Fair hearing Officers. The Administrator of the Division and the State Rehabilitation Council shall identify a list of fair hearing officers jointly. The Administrator and the customer shall select the fair hearing officer from the list.

05. Written Report. The fair hearing officer shall issue a written report of the findings and decision of the hearing within thirty (30) calendar days of the completion of the hearing.

06. Decision. The decision of the fair hearing officer shall be considered final by the agency.

07. Dispute. Any party who disagrees with the findings and decisions of a fair hearing officer shall have the right to bring a civil action with respect to the matter in dispute. The action may be brought in any state court of competent jurisdiction or in a district court of the United States of competent jurisdiction without regard to the amount in controversy.

104. -- 199. (RESERVED).

200. PROVISION OF SERVICES ON A STATEWIDE BASIS.

Vocational Rehabilitation services are offered on a statewide basis to individuals with disabilities, subject to eligibility determination.

201. REFERRAL AND APPLICATION FOR SERVICES.

01. Referral. An agency, organization, individual (including self) or programs of the American Job Center network may refer an individual for services. The Division will make a minimum of three (3) attempts to respond to the individual before closing the referral.

02. Application for Services. The application process includes the following; an individual must sign and date an application, or make a request for alternate application, provide necessary information to begin an assessment of eligibility, information gathered in the intake interview meets this criterion, and the customer is available and free of restrictions to complete the assessment process for determining eligibility for Division services.

a. Residency Requirement. There is no duration of residency to apply for Division services. Individuals must be living in the state of Idaho and legally able to work in the United States (i.e., non-U.S. citizens must show they are legally able to work within the United States).

b. Other Requirements. Customers must be available to participate in the eligibility determination process and will be informed of their rights and responsibilities as a customer of the program.

202. ELIGIBILITY REQUIREMENTS.

Eligibility for Division services is based upon the following criteria:

- 01.** The customer has a physical or mental impairment documented by a qualified professional;
- 02.** The customer's physical or mental impairment constitutes a substantial impediment to employment as determined by a qualified Vocational Rehabilitation Counselor (VRC);
- 03.** A determination by a qualified VRC employed by the Division that the customer requires vocational rehabilitation services to prepare for, secure, retain, advance in, or regain employment consistent with the applicant's unique strengths, resources, priorities, concerns, abilities, capabilities, interests, and informed choice. A qualified VRC is an individual who meets existing licensure or certification requirements applicable to the profession and who meets the Division's Comprehensive System of Personnel Development policy.

203. PRESUMPTIVE ELIGIBILITY.

Individuals eligible for Social Security benefits under Title II or Title XVI of the Social Security Act, based upon their disability, are presumed to meet the eligibility requirements for vocational rehabilitation services, unless the VRC questions the individual's ability to benefit from vocational rehabilitation services because of the severity of the individual's disability.

204. TRIAL WORK EXPERIENCE.

In cases where a VRC questions a customer's ability to benefit from vocational rehabilitation services, due to the severity of their disability, the VRC must obtain clear and convincing evidence that the individual cannot benefit from services, prior to closing the individual's case. A trial work plan should only include those services which will assess an individual's ability to work in competitive integrated employment.

205. SEVERITY OF DISABILITY.

At the time a customer is determined eligible for vocational rehabilitation services, a determination of the significance of disability, as it relates to employment, will also be determined. A priority category assignment will be determined for all eligible individuals, in one of the following categories:

- 01. Priority Category 1 - Eligible Individuals with the Most Significant Disabilities (MSD).**
 - a.** Meets criteria established for a customer with a significant disability; and
 - b.** Experiences a severe physical and/or mental impairment that seriously limits three or more functional categories (such as mobility, work skills, self-care, interpersonal skills, communication, self-direction or work tolerance) in terms of an employment outcome; and

c. Requires multiple primary Individualized Plan for Employment (IPE) services for six (6) months or more.

02. Priority Category 2 - Eligible Individuals with Significant Disabilities.

a. Meets the criteria for a customer with no significant disability; and

b. Experiences a severe physical and/or mental impairment that seriously limits two functional categories (such as mobility, work skills, self-care, interpersonal skills, communication, self-direction or work tolerance) in terms of an employment outcome; and

c. Requires multiple primary IPE services for six (6) months or more.

03. Priority Category 3 - All other Eligible Individuals with Disabilities.

a. Has a physical or mental impairment; and

b. Impairment constitutes or results in a substantial impediment to employment; and

c. Requires vocational rehabilitation services to prepare for, secure, retain, regain or advance in employment consistent with the individual's strengths, resources, priorities, concerns, abilities, capabilities, interests, and informed choice.

206. COMPREHENSIVE ASSESSMENT OF REHABILITATION NEEDS.

A comprehensive assessment of rehabilitation needs is a process utilized to identify the customer's strengths, resources, priorities, concerns, abilities, capabilities, interests, and informed choice as it relates to identifying and selecting a vocational goal. The assessment shall be conducted in the most integrated setting possible, consistent with the informed choice of the customer.

207. INDIVIDUALIZED PLAN FOR EMPLOYMENT.

a. **IPE Requirements.** An eligible customer, or their representative, may develop all or part of their Individualized Plan for Employment, with or without assistance from the Division, however the IPE must be agreed to by a qualified Division staff member. The Division will not pay for IPE development services from other providers. The customer shall receive a copy of the signed IPE and any subsequent IPEs. There will be only one active IPE at any given time. The Division supports vocational goals in competitive integrated employment, including supported employment and self-employment.

b. **IPE Content.** The IPE will contain the following elements, per federal requirements, including;

- i. identification of a specific employment outcome,
- ii. necessary rehabilitation services to achieve the employment outcome,
- iii. timelines for achieving the employment outcome and for the initiation of services,

- iv. identification of service providers,
- v. criteria used to evaluate progress,
- vi. terms and conditions including customer rights and responsibilities,
- vii. customer's financial participation, if appropriate,
- viii. identification of comparable benefits as appropriate, and
- ix. the expected need for post-employment services.

c. Annual IPE Review. IPEs will be reviewed on an annual basis.

208. CASE CLOSURE.

The Division may close a customer's case at any time in the vocational rehabilitation process for various reasons, in compliance with federal regulations and reporting guidelines. General reasons for case closure may occur when the vocational rehabilitation counselor determines that a customer is either not eligible or no longer eligible for vocational rehabilitation services; is unavailable to participate in the vocational rehabilitation program; declines to participate in the program; or the customer achieves an employment outcome. Regardless of when in the process the record of service is closed, the vocational rehabilitation counselor must make reasonable attempts to contact the individual, or as appropriate their representative, prior to case closure to discuss the pending case closure. A closure letter or appropriate form of communication is also sent to all individuals whose case is being closed.

209. ORDER OF SELECTION.

01. Order of Selection. When the Division cannot provide the full range of vocational rehabilitation services to all eligible customers because of fiscal or personnel capacity constraints, the agency will enter an order of selection. The order of selection will be based on the following requirements:

a. Students with disabilities, as defined by 34 CFR 361.5(c)(51), who received pre-employment transition services prior to eligibility determination and assignment to a disability priority category shall continue to receive such services.

b. All customers who have an Individualized Plan for Employment will continue to be served.

02. Priority Status. Priority will be given to eligible individuals with the most significant disabilities, followed by those eligible individuals with significant disabilities, and finally those eligible individuals with disabilities. All eligible customers will be assigned to one (1) of the priority categories as outlined in section 205 above.

03. When Unable to Serve Eligible Individuals. If the Idaho Division of Vocational Rehabilitation cannot serve all eligible individuals within a given priority category, individuals will be released from the statewide waitlist based on disability priority category and date of application.

210. -- 299. (RESERVED).

300. FINANCIAL PARTICIPATION REQUIREMENTS.

The Idaho Division of Vocational Rehabilitation will consider the financial need of an eligible customer for the purposes of determining the extent of their participation in the costs of vocational rehabilitation services. Financial need will not be a consideration in the determination of eligibility for Vocational Rehabilitation but will be a consideration in allocating the cost of VR services, with some exceptions.

01. Financial Participation Assessment. Financial participation will be assessed after eligibility, during plan development, while exploring comparable benefits, prior to a plan amendment, and on an annual basis or if a customer's financial circumstances change significantly, whichever occurs sooner.

02. Services Exempt from Financial Participation. Services exempt from financial participation include:

- a. Assessment for determining eligibility and vocational rehabilitation needs.
- b. Vocational rehabilitation counseling and guidance and referral services.
- c. Auxiliary aid or services needed (e.g., interpreter services or reader services) that an individual with a disability requires in order to participate in the vocational rehabilitation program.
- d. Personal assistance services.
- e. Job related services, including; job readiness training, job search assistance and placement assistance, SE job coaching, job supports – short term and youth extended services.
- f. Pre-employment Transition Services.

03. Financial Participation Criteria. Several factors are considered in determining a customer's level of financial participation, including the household income, family size, estimated annual plan costs, exclusions such as disability impairment related work expenses, and available financial resources which exceed the Department of Health and Human Services (HHS) Federal Poverty Guidelines. Individuals who receive Social security benefits, because of their disability, are exempt for contributing towards plan costs, except for those costs exceeding Division limits. The Division has limits for services and uses a low bid, when possible. Exceptions to financial participation may be granted with appropriate approval when adherence to financial participation could seriously jeopardize the customer's opportunity to achieve the Individualized Plan for Employment objectives and employment outcome.

301. COMPARABLE BEEFITS.

Eligible customers are required to identify and use all comparable benefits that may be available during the development of the Individualized Plan for Employment, including, but not limited to, accommodations and auxiliary aids and services, which may meet, in whole or in part, the cost of vocational rehabilitation services. Comparable benefits and services must be utilized before agency funds are used.

01. Exempt Services. Services exempt from the requirement to utilize comparable services and benefits include; medical, psychological or other examinations to determine eligibility, vocational counseling and guidance, information and referral, job related services to include job search, job supports, job placement and retention services, evaluation of vocational rehabilitation potential, and rehabilitation technology (not including personally prescribed devices).

02. Availability of Comparable Benefits. If comparable services or benefits are not available at the time needed to ensure progress toward achieving the employment outcome, The Division may provide such services until comparable services and benefits become available.

302. -- 399. (RESERVED).

400. PURCHASING REQUIREMENTS.

All services and purchases will follow federal, state, and Division purchasing guidelines. Purchases require written authorization prior to the initiation of the purchased service. An authorization must be issued on or before the beginning date of services. If services are provided without a Division approved authorization, the Division reserves the right to deny the vendor's invoice. The method of procurement is determined in partnership with the customer, however, the Division prefers that an authorization for purchase be used over other methods, with an invoice from the vendor documenting the service provision. The Division will pay for pre-employment transition services and other services that contribute to the determination of eligibility or that are necessary to achieve an employment outcome.

401. PURCHASING STANDARDS.

The Division pays usual, customary, and reasonable charges for services. The Division has established hierarchical levels of purchasing authority to balance process efficiency with the Division's internal controls. The majority of service negotiation is at the counselor level. When necessary, varying levels of exceptions to purchasing authority are available by appropriate management staff. Decisions on case expenditures are determined on an individualized basis. The customer may choose their preferred vendor, however, if the cost of a service exceeds a control threshold, the customer will be responsible for the excess amount, absent an exception. Services that will meet the customer's need at the least cost to the Division shall be the service cost considered for planning purposes. Services available in the State of Idaho are preferred over more costly out-of-state options, where applicable.

402. PROVISION OF COMMUNITY REHABILITATION PROGRAM SERVICES.

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ATTACHMENT 1

The Idaho Division of Vocational Rehabilitation will purchase vocational services from CRPs that are accredited by either the Commission Accreditation Rehabilitation Facilities or the Rehabilitation Services Accreditation System. In conjunction with the customer, the qualified professional vocational rehabilitation counselor will determine which CRP services, if any, are required for the customer to achieve an employment outcome. The Division will determine the method for establishing CRP service rates.

403. -- 999. (RESERVED).

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SUBJECT

Temporary and Proposed Rule – Docket No. 08-0113-1901, Rules Governing the Opportunity Scholarship Program

REFERENCE

August 2015	Board approved proposed rule amendments, consisting of technical edits allowing for greater efficiency in administering the Opportunity Scholarship program.
November 30, 2015	Board approved pending rule Docket 08-0113-1501, Rules Governing the Opportunity Scholarship.
August 31, 2017	Board approved proposed rule Docket 08-0113-1701, Rules Governing the Opportunity Scholarship, making technical corrections and clarifying that GPAs of more than one decimal place will be rounded up.
November 15, 2017	Board approved pending rule Docket 08-0113-1701.
April 2018	Board approved temporary rule Docket 08-0113-1801, establishing provision for the Opportunity Scholarship to be used for “Adult Learners.”
August 2018	Board approved proposed rule Docket 08-0113-1802 establishing provision for the Opportunity Scholarship for Adult Learners.
November 2018	Board vacated proposed rule Docket 08-0113-1802 and directed staff to bring back a version allowing certificates to be stackable during the 2019-2020 rulemaking cycle.

APPLICABLE STATUTE, RULE, OR POLICY

Idaho Administrative Code, IDAPA 08.01.13, Rules Governing the Opportunity Scholarship Program
Section 33-4303, Idaho Code, Opportunity Scholarship

ALIGNMENT WITH STRATEGIC PLAN

Goal 3: Educational Attainment; Objective A: Higher Level of Educational Attainment and Objective C: Access

BACKGROUND/DISCUSSION

IDAPA 08.01.13 sets out the eligibility and application requirements for the Opportunity Scholarship, as authorized by Section 33-4303, Idaho Code. Senate Bill 1279 (2018), amended Section 33-4303, Idaho Code, authorizing the State Board of Education to award up to 20% of the funds appropriated for the Opportunity Scholarship to individuals with 24 or more postsecondary credits.

The proposed rule would make amendments to the student eligibility and application requirements to allow for a portion of the Opportunity Scholarship

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awards to be used for individuals who have earned 24 or more postsecondary credits. Proposed amendments include:

- Defining an “Adult Learner” and graduation plan;
- Lower the minimum GPA from 3.0 to 2.7 for all students while allowing Adult Learners to apply with a 2.5 GPA and renew with a 2.7 GPA;
- Allow Adult Learners to apply at an alternate date set by the Executive Director, rather than the current March 1 deadline;
- Require Adult Learners to have “stopped out” for 24 or more months, with the exception of two (2) courses;
- Allow Adult Learners to attend part-time;
- Pro-rate the amount of the awards for Adult Learners based on the number of credits attempted down to a minimum of six (6) credits;
- Require institutions to discuss opportunities for students to receive credits through prior learning assessments; and
- Require students to show progress on their educational plans to maintain scholarship eligibility.

The proposed rule amendments are based on research from other states which have implemented similar scholarships, feedback received from Idaho postsecondary institutions and the Legislature during the 2018 and 2019 Legislative Session.

All students may stack certificates and associate degrees that are part of the natural progress towards a baccalaureate degree.

IMPACT

The temporary and proposed rule will set the requirements for awarding the Opportunity Scholarships who apply as Adult Learners.

ATTACHMENTS

Attachment 1 – Temporary and Proposed Rule Docket No. 08-0113-1901

STAFF COMMENTS AND RECOMMENDATIONS

Administrative rules are made up of three types of rules, temporary rules, proposed rules and pending rules. Temporary and proposed rules may be promulgated jointly with a single docket number or temporary rules may be promulgated as a standalone rule. The Notice of Intent to Promulgate Rules was published in the July 6, 2019 (Vol 19-7) Idaho Administrative Rules Bulletin. Staff received no requests to participate in the negotiated rulemaking process.

Proposed rules approved by the Board are published in the Idaho Administrative Rules Bulletin. Following publication there is a 21-day comment period. Based on received comments and Board direction, changes may be made to proposed rules prior to entering the pending stage. Pending rules are then brought back to the Board for consideration. Once approved, pending rules will be submitted to the Department of Administration for publication in the Idaho Administrative Rules

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Bulletin and are then forwarded to the legislature for consideration. Pending rules become effective at the end of the legislative session in which they are submitted, if they are not rejected by the Legislature.

Staff recommends approval.

BOARD ACTION

I move to approve temporary and proposed rule – Docket No. 08-0113-1901, as submitted in Attachment 1.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

**IDAPA 08
TITLE 01
CHAPTER 13**

08.01.13 – Rules Governing the Opportunity Scholarship Program

000. LEGAL AUTHORITY.

In accordance with Sections 33-105, and 33-4303, Idaho Code, the State Board of Education (Board) shall promulgate rules implementing the provisions of Title 33, Chapter 56, Idaho Code. (3-28-18)

001. TITLE AND SCOPE.

01. Title. These rules shall be cited as IDAPA 08.01.13, “Rules Governing the Opportunity Scholarship Program.” (4-2-08)

02. Scope. These rules constitute the requirements for the Opportunity Scholarship Program. (4-2-08)

002. WRITTEN INTERPRETATIONS.

In accordance with Section 67-5201(19)(b)(iv), Idaho Code, written interpretations, if any, of the rules of this chapter are available at the Board. (4-2-08)

003. ADMINISTRATIVE APPEALS.

Unless otherwise provided for in the rules of the Board or in the Board Governing Policies and Procedures, all administrative appeals allowed by law shall be conducted as provided herein. (4-2-08)

004. INCORPORATION BY REFERENCE.

There are no documents that have been incorporated by reference into these rules. (4-2-08)

005. OFFICE INFORMATION.

01. Office Hours. The offices of the Board are open from 8 a.m. to 5 p.m., except Saturday, Sunday, and legal holidays. (4-2-08)

02. Street Address. The offices of the Board are located at 650 W. State Street, Boise, Idaho. (4-2-08)

03. Mailing Address. The mailing address of the Board is P.O. Box 83720, Boise, Idaho 83720-0037. (4-2-08)

04. Telephone Number. The telephone number of the Board is (208) 334-2270. (4-2-08)

05. Facsimile. The facsimile number of the Board is (208) 334-2632. (4-2-08)

06. Electronic Address. The electronic address of the Board of Education at www.boardofed.idaho.gov. (4-2-08)

006. PUBLIC RECORDS ACT COMPLIANCE.

These rules are subject to the provisions of the Idaho Public Records Act, Title 74, Chapter 1, Idaho Code. (4-2-08)

007. -- 009. (RESERVED)

010. DEFINITIONS.

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- 01. Adult Learner.** Means an individual who: ()
- a. Is not currently enrolled in a postsecondary institution accredited by a body recognized by the State Board of Education; ()
- b. Has not attended more than two (2) courses at a postsecondary institution at any time during the twenty-four (24) month period immediately prior to application for the Opportunity Scholarship; and ()
- c. Has earned twenty-four (24) or more transferable credits from a postsecondary institution accredited by a body recognized by the State Board of Education. ()

042. Grade Point Average (GPA). Means the average grade earned by a student, figured by dividing the grade points earned by the number of credits attempted. (3-20-14)

03. Graduation Plan. Means a plan developed by the postsecondary student in consultation with the postsecondary institution that identifies the certificate or degree the student is pursuing, the course and credit requirements necessary for earning the certificate or degree, the application of previously earned credits and credits granted through prior learning assessments, the estimated number of terms remaining to complete the certificate or degree and the proposed courses to be taken during each term. ()

011. -- 100. (RESERVED)

101. ELIGIBILITY.

Applicants must meet all of the eligibility requirements to be considered for the scholarship award. (3-28-18)

01. Undergraduate Student. An eligible student must be pursuing their first undergraduate certificate or degree from an institution accredited by a body recognized by the State Board of Education. A student may have received multiple certificates or degrees as part of the natural progression towards a recognized baccalaureate degree program. A student who is enrolled in a graduate program, but who has not yet earned a baccalaureate degree, is not eligible for an opportunity scholarship. A student enrolled in an undergraduate program is eligible for consideration for an opportunity scholarship, even if some of the student's courses are at the graduate level.
(3-20-14)()

02. Academic Eligibility. To be eligible for an opportunity scholarship, an applicant must meet minimum academic eligibility criteria, as follows: (3-28-18)

a. A student who has not yet graduated from secondary school or its equivalent in the state of Idaho must have an un-weighted minimum cumulative grade point of average of ~~three-two~~ point ~~zero-seven~~ (3-02.7) or better on a scale of four point zero (4.0) to be eligible to apply for an opportunity scholarship. Cumulative grade point averages of more than one (1) decimal place shall be rounded to one (1) place. Home schooled students must provide a transcript of subjects taught and grades received signed by the parent or guardian of the student; or (3-28-18)()

b. A student who has obtained a general equivalency diploma must have taken the ACT assessment and received a minimum composite score of twenty (20) or better, or the equivalent SAT assessment and received a one thousand ten (1,010) or better, to be academically eligible to apply for an opportunity scholarship; or (3-28-18)

c. A student currently enrolled in an eligible Idaho postsecondary educational institution must have a minimum cumulative grade point average of ~~three-two~~ point ~~zero-seven~~ (3-02.7) or better on a scale of four point zero (4.0) at such institution in order to be academically eligible to apply for an opportunity scholarship. Cumulative grade point averages of more than one (1) decimal place shall be rounded to one (1) place. (3-28-18)()

d. An Adult Learner must have a minimum cumulative grade point average of two point seven (2.5) or higher on a scale of four point zero (4.0). Cumulative grade point averages of more than one (1) decimal place shall be rounded to one (1) decimal place. ()

03. Financial Eligibility. Applicants for the opportunity scholarship are selected as recipients, in part, based on demonstrated financial need. The tool used to determine financial need is the Free Application for Federal Student Aid (FAFSA), used by the United States Department of Education. The financial need of an applicant for an

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opportunity scholarship will be based upon the verified expected family contribution, as identified by the FAFSA Student Aid report. The Student Aid report used to calculate financial need will be the report generated on the ~~March 1~~ application deadline. (3-28-18)()

04. Additional Eligibility Requirements. (4-2-08)

a. A student must not be in default on a student educational loan, or owe a repayment on a federal grant, and must be in good financial standing with the opportunity scholarship program. (3-20-14)

b. If a student has attempted or completed more than one hundred (100) postsecondary academic credits, then such student must identify his or her major, the required number of credits necessary for graduation in such major, and shall submit an academic transcript that contains all courses taken and all postsecondary academic credit received to the Board office. A student shall not be eligible for an opportunity scholarship if: (3-20-14)

i. The student is not meeting satisfactory academic progress at the eligible Idaho postsecondary educational institution the student is attending at the time he or she applies for an opportunity scholarship; (4-2-08)

ii. The student has completed more than one hundred fifty percent (150%) of the courses and academic credit necessary to graduate in such major; or (4-2-08)

iii. Upon review of the student's academic transcript(s), the student cannot complete their degree/certificate in the major they have identified within two (2) semesters based on normal academic course load unless a determination by the executive director or designee has been made that there are extenuating circumstances and the student has a plan approved by the executive director or designee outlining the courses that will be taken and the completion date of the degree or certificate. (3-28-18)

102. -- 201. (RESERVED)

202. APPLICATION PROCESS.

01. Initial Applications. An eligible student must complete and submit the opportunity scholarship program application to the Board electronically on or before the date specified in the application, but not later than the deadline set by the executive director each year if an Adult Learner and not later than March 1 for all other students. Adult Learn applications will be processed and awarded on a monthly basis upto the application deadline. An applicant without electronic capabilities may request a waiver of this requirement and if granted submit an application on the form established by the Board through the United States Postal Service, which must be postmarked not later than March 1 the applicable application deadline. All applicants must complete and submit the FAFSA on or prior to March 1 the application deadline. (3-28-18)()

02. Announcement of Award. Announcement of the award of initial scholarships will be made no later than June 1 of each year, with awards to be effective at the beginning of the first full term following July 1 of that year. Announcements must clearly state the award is part of the state's scholarship program and is funded through state appropriated funds. Additional award announcement may be made after this date based on the availability of funds and the acceptance rate of the initial awards. (3-9-16)

03. Communication with State Officials. Applicants must respond by the date specified to any communication from officials of the opportunity scholarship program. Failure to respond within the time period specified will result in cancellation of the application or forfeiture of the scholarship unless extenuating circumstances are involved and approved by the executive director or designee. (3-28-18)

203. -- 299. (RESERVED)

300. SELECTION OF SCHOLARSHIP RECIPIENTS.

01. Selection Process. Scholarship awards will be based on the availability of scholarship program

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funds. Opportunity scholarships will be awarded to applicants, based on ranking and priority, in accordance with the following criteria: (3-28-18)

a. Eligible students shall be selected based on ranking criteria that assigns seventy percent (70%) to financial eligibility, and thirty percent (30%) to academic eligibility. In the event that this weighted score results in a tie, an eligible student who submitted his application to the Board earliest in time will be assigned a higher rank. (3-28-18)

b. Notwithstanding Subsection 300.01.a. of these rules, the priority for the selection of recipients of opportunity scholarship awards shall be to scholarship recipients who received an opportunity scholarship award during the previous fiscal year, and have met all of the continuing eligibility requirements provided in these rules. (3-28-18)

02. Monetary Value of the Opportunity Scholarship. (4-2-08)

a. The Board will establish annually the educational costs for attending an eligible Idaho postsecondary educational institution for purposes of the opportunity scholarship program. (3-28-18)

b. The monetary value of the opportunity scholarship award to a student shall be based on the educational costs for attending an eligible Idaho postsecondary educational institution, less the following: (4-2-08)

i. The amount of the assigned student responsibility, established by the Board annually; (4-2-08)

ii. The amount of federal grant aid, as identified by the Student Aid Report (SAR) that is known at the time of award determination; (3-20-14)

iii. The amount of other financial aid awarded the student, from private or other sources that is known at the time of award determination. (3-20-14)

iv. The eligible maximum award amount for Adult Learners enrolled in less than twenty-four (24) credit hours or its equivalent in an academic year attending an eligible four-year postsecondary institution or less than eighteen (18) credit hours or its equivalent in an academic year attending an eligible two-year institution will be prorated as follows: ()

(1) Enrolled in six (6) to eight (8) credits or its equivalent per term, fifty percent (50%) of the maximum award amount; ()

(2) Enrolled in nine (9) to eleven (11) credits or its equivalent per term, seventy-five percent (75%) of the maximum award amount; and ()

(3) Enrolled in twelve (12) or more credits or its equivalent per term, one-hundred percent (100) of the maximum award amount. ()

c. The amount of an opportunity scholarship award to an individual student shall not exceed the educational cost established by the Board annually, and shall not exceed the actual cost of tuition and fees at ~~an~~the Idaho public postsecondary educational institution the student attends or will attend, or if the student attends or will attend an Idaho private postsecondary educational institution, the average tuition at Idaho's public four (4) year postsecondary educational institutions. (3-28-18)()

301. OPPORTUNITY SCHOLARSHIP AWARD.

01. Payment. Payment of opportunity scholarship awards will be made in the name of the recipient and will be sent to a designated official at the eligible Idaho postsecondary educational institution in which the recipient is enrolled. The official must transmit the payment to the recipient within a reasonable time following receipt of the payment. (4-2-08)

02. Duration. Scholarships will be awarded on an annual basis and payments will correspond to academic terms, semesters, quarters, or equivalent units. In no instance will the entire amount of a scholarship be paid

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in advance to, or on behalf of, a scholarship recipient. The scholarship may cover up to four (4) educational years, or eight (8) semesters or equivalent for attendance at an eligible Idaho postsecondary educational institution. Awards are contingent on annual appropriations by the legislature and continued eligibility of the student. (3-28-18)

03. Eligibility. If a student receives an opportunity scholarship payment and it is later determined that the student did not meet all of the Opportunity Scholarship Program eligibility requirements, then the student is considered in overpayment status, and must return program funds in accordance with the eligible Idaho postsecondary educational institution's refund policy. (4-2-08)

302. CONTINUING ELIGIBILITY.

To remain eligible for renewal of an opportunity scholarship, the recipient must comply with all of the provisions of the Opportunity Scholarship Program and these rules: (3-28-18)

~~**01. Renewal Application.** A scholarship recipient must complete and submit a renewal application in order to be considered for a continuing scholarship for each succeeding year and update and submit the FAFSA on or prior to March 1. (3-20-14)~~

~~**0201. Credit Hours.** To remain eligible for renewal of an opportunity scholarship, the scholarship recipient attending a four (4) year eligible postsecondary institution must have completed a minimum of twenty-four (24) credit hours or its equivalent each academic year that the student received an opportunity scholarship award. A scholarship recipient attending a two (2) year eligible postsecondary institution must have completed a minimum of eighteen (18) credit hours or its equivalent each academic year that the student received an opportunity scholarship award. Notwithstanding these provisions, a scholarship recipient that has received the Opportunity Scholarship as an Adult Learner may retain eligibility through the completion of twelve (12) or more credit hours or its equivalent each academic year the student received the Opportunity Scholarship award. All students may use the summer term to meet the annual credit accumulation requirements. (3-9-16)()~~

~~**0302. Satisfactory Academic Progress.** To remain eligible for renewal of an opportunity scholarship, the scholarship recipient must have maintained a minimum cumulative grade point average of three-two point ~~zero-seven~~ (3.20) on a scale of four point zero (4.0) during the time that the recipient received an opportunity scholarship award at the institutions the student attended while receiving the scholarship, and must be maintaining satisfactory academic progress, consistent within federal financial aid regulations as implemented at the eligible Idaho postsecondary educational institution at which the scholarship recipient was enrolled. Students receiving an Opportunity Scholarship award as an adult learner must make satisfactory progress on the student's graduation plan established with the eligible institution at the time of admission. (3-28-18)()~~

~~**0403. Maximum Duration of Scholarship Award.** The award of an opportunity scholarship shall not exceed the equivalent of eight (8) semesters or the equivalent of four (4) academic years. (3-20-14)~~

~~**0504. Eligibility Following Interruption of Continuous Enrollment.** A scholarship recipient whose continuous enrollment is interrupted for more than four (4) months but less than two (2) years for any reason but who intends to re-enroll in an eligible Idaho postsecondary educational institution must file a letter of intent to withdraw no later than sixty (60) days prior to the first day of the academic term of the discontinued attendance to the Office of the State Board of Education. Failure to do so may result in forfeiture of the scholarship. The Board's Executive Director or designee will review each request for interruption and notify the individual of approval or denial of the request. In addition, the individual must file a statement with the Board declaring his intent to re-enroll as a full-time undergraduate student in an academic or career technical program in an eligible Idaho postsecondary educational institution for the succeeding academic year no later than thirty (30) days prior to the first day of the academic term in which the individual intends to re-enroll within two (2) years of the approval of the request to withdraw. Failure to do so will result in forfeiture of the scholarship unless an extension has been granted. An extension of interruption of continuous enrollment period may be granted for eligible students due to military service in the United States armed forces, medical circumstances, or other circumstances approved by the executive director. All requests for extension must be made sixty (60) days prior to the start of the succeeding academic year.~~

(3-28-18)

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303. -- 399. (RESERVED)

400. RESPONSIBILITIES OF ELIGIBLE IDAHO POSTSECONDARY EDUCATIONAL INSTITUTIONS.

01. Statements of Continuing Eligibility. An eligible Idaho postsecondary educational institution participating in this Opportunity Scholarship Program must submit statements of continuing student eligibility to the Board by the 30th day after the end of each academic year. Such statements must include verification that the scholarship recipient is still enrolled, attending part-time if an Adult Learner and full-time for all other scholarship recipients, maintaining satisfactory academic progress, and has not exceeded the award eligibility terms. ~~(3-9-16)~~

02. Other Requirements. An eligible Idaho postsecondary educational institution must: (4-2-08)

a. Be eligible to participate in Federal Title IV financial aid programs, and must supply documentation to the Board verifying this eligibility, and prompt notification regarding any changes in this status; (4-2-08)

b. Have the necessary administrative computing capability to administer the Opportunity Scholarship Program on its campus, and electronically report student data records to the Board; (4-2-08)

c. Provide data on student enrollment and federal, state, and private financial aid for students to the Board, and (4-2-08)

d. Agree to permit periodic Opportunity Scholarship Program audits to verify compliance with Idaho law and these rules related to the program. (4-2-08)

03. Adult Learner Evaluation. Upon admission, scholarship recipients receiving an award as an Adult Learner shall be administered prior learning assessments to determine eligibility for credit for prior learning including credit for prior experiential learning. As part of this process an eligible institution shall work with the student to develop a graduation plan for the program they are entering that includes estimated completion dates.

401. -- 500. (RESERVED)

501. APPEALS.

An opportunity scholarship applicant or recipient adversely affected by a decision made under provisions of these rules may file a written appeal of the decision within thirty (30) days following notice of the decision, and the written statement must include the basis for the appeal. Decisions based on specific requirements established in Idaho Code or these rules may not be appealed. The appeal must be submitted to the executive director of the Board. The office of the board shall acknowledge receipt of the appeal within seven (7) days. The executive director of the Board may or may not agree to review the action, or may appoint a subcommittee of three (3) persons to hear the appeal, including at least one (1) financial aid administrator at an eligible postsecondary educational institution in

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SUBJECT

Proposed Rule – Docket No. 08-0201-1901, Rules Governing Administration

APPLICABLE STATUTE, RULE, OR POLICY

Idaho Administrative Code, IDAPA 08.02.01, Rules Governing Administration
Section 33-1001, 33-1027, and 33-1028, Idaho Code

ALIGNMENT WITH STRATEGIC PLAN

Goal 1: Educational Attainment; Objective A: Data Access and Transparency

BACKGROUND/DISCUSSION

Multiple draft bills were circulated during the 2019 legislative session rewriting the public school funding formula. Of these drafts three bills were printed. Two senate bills, SB1186 and SB1196 proposed rewriting the public schools funding formula to a “student centered” model based on student enrollment rather than an “allocation” model based on average daily attendance of students and personnel costs (salary based apportionment). A number of amendments were made throughout the process to try and reconcile the desired legislative policy change with education stakeholder concerns. Common ground between these two groups was not found during the session. Two of the major concerns raised by stakeholders were around the estimated numbers used for determining the fiscal impact of the proposed changes and how student enrollment would be counted for those students that attended more than one school. The proposed funding formula introduced a number of student characteristics that would be used to adjust the weight of the student enrollment in calculating a school district or charter schools funding from the state. These student characteristics were then identified through defined terms within the legislation to assure the uniform collection and application of the data necessary for calculating funding. In some cases the student characteristics were student information that is not currently collected at the state level or is currently collected but not in the same manner as proposed for use in the funding formula. For these defined terms, estimates were used to calculate the fiscal impact on an individual school district or charter school.

Additionally, the new funding formula proposed using student enrollment rather than average daily attendance. Similarly to the current calculation of average daily attendance, the legislation stipulated a single student could not be counted as more than one (1) unweighted full-time equivalent (FTE) student with one exception. Students who met the definition of an at-risk student and were participating in a summer school or night school program could be counted for up to 1.25 unweighted FTE. The proposed versions of the legislation then authorized the Board to promulgate rules for determining how fractional enrollment would be calculated for those students that attended more than one school district or charter school.

While none of the proposed new funding formulas were enacted, a bill, HB293 (2019), was enacted. HB293 establishes the majority of the definitions that were

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proposed in the earlier public school funding formula bills, with the addition of moving the definition of At-Risk Student from Idaho Administrative Code to Idaho Code and tasks the Board and the Department (as the Board's delegate) with collecting and reporting the necessary data for the next legislative session so that actual numbers can be used for determining the fiscal impact of future changes to how public schools are funding rather than using estimates. HB293 also tasks the Board with promulgating rules necessary to determine how fractional enrollment will be calculated. Furthermore, HB293 establishes additional reporting requirements for school districts and charters schools regarding how funds appropriated for current statutory line items, pursuant to Section 33-1002, Idaho Code, are being used.

The intent of HB293, as expressed by legislators, is to collect and report the data identified as necessary to determine the impact of a proposed change in the way public schools are funded so the legislature can make an informed decision, and to address the data used for projecting the fiscal impact and how fractional enrollment would be calculated.

Staff were only able to conduct a few preliminary meetings with education stakeholder groups and the Department of Education staff prior to school district and charter school staff leaving for the summer break. As a result of these meetings, the proposed rule provided in Attachment 1 was developed. Following the Board's consideration, additional meetings will be held in the regions with school district and charter school staff to garner additional feedback. Staff found during the initial meetings that more constructive feedback could be solicited with a written proposal than we were able to gather from a conceptual discussion. The stakeholder representatives' organizations participated in the negotiated rulemaking for this rule and agreed that having a proposed rule would make gathering additional input more productive.

Section 33-1027, Idaho Code, requires that the procedures for student enrollment counts be consistent with the following:

- 1) Full-time enrollment (FTE) shall be based on enrollment in any school district or public charter school;
- 2) A student shall not exceed a total of one (1.0) unweighted FTE in a single school year, except as provided in subsection (4) of this section;
- 3) A kindergarten student shall not exceed a total of one-half (0.5) unweighted enrollment in a single school year;
- 4) A student attending a summer school or night school program shall not exceed a total of one-fourth (0.25) unweighted enrollment. Such student may be counted pursuant to both this subsection and subsection (2) of this section; and
- 5) A fractional enrollment count schedule shall be specified for any student enrolled less than one (1.0) FTE in a given school district or public charter school;

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- 6) FTE is based on the courses a student is enrolled in at the time of the official count, as specified in board rule, except that a student may be counted as enrolled if the term for which such student is enrolled begins after the time of the official count.

The proposed rule looks at students who attend one school district or charter school (local education agency or LEA) and those students that attend more than one LEA. Section 33-1027, Idaho Code, requires the FTE be based on the courses the student is enrolled in. Because school district and charter schools are allowed to set their own schedules, we have schools with a semester schedule, trimester schedule, and a year-round schedule. Additionally, within these three type of annual schedules we have some LEAs that have four-day school weeks with longer class periods, some with block schedules where the student has a class two or three days a week with alternating classes on the days, and the more traditional shorter class periods with the course being taken each day of the week. Due to these complexities, consensus could not be found on a way to base the fractionalization on the number of courses alone. The current calculation for average daily attendance is based on students attending 2.5 hours (half-day) or 4 hours (full-day) or more. Using this concept the courses could be broken out to minutes per week, with 1,200 minutes per week being consistent with the current four-hour requirement for a full day of average daily attendance. Using this methodology the formula for calculating student enrollment full-time equivalency provided in Attachment 1 was developed.

The proposed formula does not fully address those students that attend more than one LEA for more than one FTE. Due to the provision that each student not equal more than one FTE, it results in each LEA that serves the student reporting less FTE for a student that they may have enrolled for a full course load when compared to a student who is only taking courses from the one LEA. While some students in grades 7 through grade 12 may be eligible for overload course funding through the Fast Forward program, this funding is not equivalent to the funding provided through the public schools appropriation for a full day of average daily attendance. Additionally, this program is not available to students in grade 6 that may be enrolled in a middle school or a charter school student in a lower grade that may be attending full-time at the charter school and participating in band or another type of course at the traditional public school.

IMPACT

The proposed rule will set reporting requirements for school districts and charter school to report student enrollment FTE.

ATTACHMENTS

Attachment 1 – Proposed Rule Docket No. 08-0201-1901

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STAFF COMMENTS AND RECOMMENDATIONS

Administrative rules are made up of three types of rules, temporary rules, proposed rules and pending rules. Temporary and proposed rules may be promulgated jointly with a single docket number or temporary rules may be promulgated as a standalone rule. The Notice of Intent to Promulgate Rules was published in the July 6, 2019 (Vol 19-7) Idaho Administrative Rules Bulletin.

Proposed rules approved by the Board are published in the Idaho Administrative Rules Bulletin. Following publication there is a 21 day comment period. Based on received comments and Board direction, changes may be made to proposed rules prior to entering the pending stage. Pending rules are then brought back to the Board for consideration. Once approved, pending rules will be submitted to the Department of Administration for publication in the Idaho Administrative Rules Bulletin and are then forwarded to the legislature for consideration. Pending rules become effective at the end of the legislative session in which they are submitted, if they are not rejected by the Legislature.

Staff will use the approved language to gather additional feedback from education stakeholders during the month of September. The feedback will be used to develop a temporary rule for the Board's consideration in October. The temporary rule will provide clarification to the school districts and charter schools until such time as a pending rule can take effect at the end of the 2020 legislative session.

Staff recommends approval.

BOARD ACTION

I move to approve proposed rule – Docket No. 08-0201-1901, as submitted in Attachment 1.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

**IDAPA 08
TITLE 02
CHAPTER 01**

08.02.01 – RULES GOVERNING ADMINISTRATION

(BREAK IN CONTINUITY OF SECTIONS)

250. PUPIL ACCOUNTING AND REQUIRED INSTRUCTIONAL TIME.

(Section 33-512, Idaho Code)

(4-1-97)

01. Required Instructional Time. Excluding transportation to and from school, lunch periods, passing times, and recess, schools must schedule at least the following instructional times: kindergarten, four hundred fifty (450) hours per year; grades one through three (1-3), eight hundred ten (810) hours per year; grades four through eight (4-8), nine hundred (900) hours per year; and grades nine through twelve (9-12), nine hundred ninety (990) hours per year. (4-1-97)

02. Required Attendance. All pupils will complete four (4) years of satisfactory attendance in grades nine through twelve (9-12) to graduate from an accredited high school, except those who are approved for early graduation. (4-1-97)

03. Day in Session When Counting Pupils in Attendance.

(4-1-97)

a. A school day for grades one through twelve (1-12) may be counted as a “day in session” when the school is open and students are under the guidance and direction of teachers in the teaching process for not less than four (4) hours of instruction per day. Lunch periods, breaks, passing time and recess will not be included in the four (4) hours. For kindergarten, each session will be at least two and one-half (2 1/2) hours per day. (4-1-97)

b. Half-day Session. A half-day in session occurs when the students in grades one through twelve (1-12) are under the guidance and direction of teachers in the teaching process for a minimum of two and one-half (2 1/2) hours of instruction or the teachers are involved in staff development activities for not less than two and one-half (2 1/2) hours. (4-1-97)

c. Teacher In-service Activities. For grades one through twelve (1-12), not more than twenty-two (22) hours may be utilized for teacher in-service activities, based on the district approved calendar. In the event a school district chooses to utilize full days instead of half-days, the attendance reported for these full days will be the average of the attendance for the other days of that same week. (4-1-97)

04. Day of Attendance - Kindergarten. A day of attendance for a kindergarten pupil is one in which a pupil is physically present for a period of two and one-half (2 1/2) hours under the direction and guidance of a teacher while school is in session or under homebound instruction. A homebound student is one who is unable to attend school for at least ten (10) consecutive days due to illness, accident or an unusual disabling condition. Attendance will be reported in half-day increments. Attendance reports for any day in the school year will reflect only those students physically present. Particularly, enrollment figures are not to be used for the beginning nor closing weeks of school. (Section 33-1001(5), Idaho Code.) (4-1-97)

05. Day of Attendance (ADA) - Grades One Through Twelve (1-12). A day of attendance is one in which a pupil is physically present for the full day under the guidance and direction of a teacher or other authorized school district personnel while school is in session or is a homebound student under the instruction of a teacher employed by the district in which the pupil resides, with the exception as stated in “day in session” above. A homebound student is one who is unable to attend school for at least ten (10) consecutive days due to illness, accident or an unusual disabling condition. Attendance will be reported in full or half-days. Attendance reports for any day in

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the school year will reflect only those students physically present or under homebound instruction. (Section 33-1001(4), Idaho Code) (4-1-97)

06. Average Daily Attendance. In a given school year, the average daily attendance for a given school is the aggregate days attendance divided by the number of days school was actually in session. (Section 33-1001(2), Idaho Code) (4-1-97)

07. Full-Time Equivalent (FTE) Enrollment Reporting.

a. Grade 1 through grade 12 students enrolled in one LEA for a total number of courses that equal 1,200 or more minutes per week shall equal one (1) FTE.

b. Grade 1 through grade 12 students enrolled in one or more LEAs for a total number of courses at all LEAs that equal 1,200 minutes per week or less, the FTE shall be based on the percentage of time each student's courses are of 1,200 minutes.

c. Grade 1 through grade 12 students enrolled in more than one LEA for a total number of courses at all LEAs that equal 1,200 or more minutes per week and less than or equal to the respective amounts in the following subsections the FTE shall be fractionalized based on percentage of time for which the student is enrolled:

i. Grade 1 through grade 3: 1,350 minutes.

ii. Grade 4 through grade 8: 1,500 minutes.

iii. Grade 9 through grade 12: 1,650 minutes.

d. Students enrolled in more than one LEA for a total number of courses at all LEAs that equal more than the following minutes the FTE shall be based on the percentage of time for which the student is enrolled:

i. Grade 1 through grade 3: 1,350 minutes.

ii. Grade 4 through grade 8: 1,500 minutes.

iii. Grade 9 through grade 12: 1,650 minutes.

(BREAK IN CONTINUITY OF SECTIONS)

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SUBJECT

Proposed Rule, Docket Number 08-0201-1902 – Rules Governing Administration
– Continuous Improvement Plans

REFERENCE

June 2015	Board approved a legislative idea to implement the Task Force subcommittee recommendation on continuous improvement plan reporting
August 2015	Board approved proposed rule 08.02.01.801 – Continuous Improvement Plans, updating the terms to bring the rule in alignment with legislative changes.
September 2015	Board approved legislation to implement the Task Force subcommittee recommendation on continuous improvement plan reporting
November 2015	Board approved pending rule 08.02.01.801 – Continuous Improvement Plans.
August 2016	Board approved temporary and proposed rule IDAPA 08.02.01.801 – Continuous Improvement Plans.
November 2016	Board approved pending rule, Docket 08-0201-1602.

APPLICABLE STATUTE, RULE, OR POLICY

Sections 33-320, 33-1212A, and 33-1616, Idaho Code

BACKGROUND/DISCUSSION

During the 2016 legislative session amendments were made to the Continuous Improvement Plan requirements (Section 33-320, Idaho Code), Literacy Intervention Plan requirements (Section 33-1616, Idaho Code) and College and Career Advising Plan requirements (Section 33-1212A). These amendments set minimum reporting requirements for the Continuous Improvement Plans and tied the Literacy Improvement Plans and College and Career Advising Plan reporting to the Continuous Improvement Plans. The proposed amendments set out the statewide readiness and improvement metrics, literacy intervention plan requirements and reporting metrics, and college and career advising plan requirements and minimum metrics. The proposed amendments to IDAPA 08.02.01.801 in 2016 set out these minimum reporting metrics, as well as other reporting requirements.

In 2017 and 2018 Board staff worked to streamline the process of submitting the school district and charter school continuous improvements. These efforts included creating templates, based on stakeholder input, that school districts could use as well as allowing school districts and charter schools to report the annual progress toward their locally set performance targets through the new accountability report cards for those measures that were duplicated in the report

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card. During the 2019 Legislative Session the State Superintendent introduced legislation that removed the reference to the grade range performance metrics and tied the annual progress reporting to the new accountability report cards. These statutory changes conflict with the language in IDAPA 08.02.02.801 making it necessary to remove the language from Administrative Code.

In addition to these changes, as part of the rule review process required by the Red Tape Reduction Act two additional sections were identified that are now obsolete and are being proposed for removal.

IMPACT

Approval of the proposed rule will bring the rule in compliance with section 33-320, 1212A, and 33-1616, Idaho Code and provide the school districts guidance on the new reporting requirements.

ATTACHMENTS

Attachment 1 – Proposed Rule, Docket Number 08-0201-1902

STAFF COMMENTS AND RECOMMENDATIONS

Administrative rules are made up of three types of rules, temporary rules, proposed rules and pending rules. Temporary and proposed rules may be promulgated jointly with a single docket number or temporary rules may be promulgated as a standalone rule. The Notice of Intent to Promulgate Rules was published in the July 6, 2019 (Vol 19-7) Idaho Administrative Rules Bulletin. Staff received no requests to participate in the negotiated rulemaking process.

Proposed rules approved by the Board are published in the Idaho Administrative Rules Bulletin. Following publication there is a 21-day comment period. Based on received comments and Board direction, changes may be made to proposed rules prior to entering the pending stage. Pending rules are then brought back to the Board for consideration. Once approved, pending rules will be submitted to the Department of Administration for publication in the Idaho Administrative Rules Bulletin and are then forwarded to the legislature for consideration. Pending rules become effective at the end of the legislative session in which they are submitted, if they are not rejected by the Legislature.

Staff recommends approval.

BOARD ACTION

I move to approve the proposed rule amendments, docket number 08-0201-1902, as submitted in Attachment 1.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

IDAPA 08
TITLE 02
CHAPTER 01

08.02.01 – RULES GOVERNING ADMINISTRATION

(BREAK IN CONTINUITY OF SECTIONS)

651. -- ~~699~~800. (RESERVED)

~~700. VETERANS EDUCATION.~~

~~The Governor of the state of Idaho has designated the State Department of Education as the approval agency in the State of Idaho for the purpose of approving courses for the enrollment of veterans and other eligible persons. (Sections 33-105; 33-107, Idaho Code) (4-1-97)~~

~~01. Responsibilities of State Approval Agency. The State Approval Agency carries the following responsibilities: (4-1-97)~~

~~a. Establishing criteria additional to requirements set forth in federal law for approving education or training programs. (4-1-97)~~

~~b. Approving education or training programs following the criteria set forth in federal law or established by the state approval agency. (4-1-97)~~

~~c. Regularly visiting and supervising those educational institutions and training establishments offering approved courses or programs. (4-1-97)~~

~~d. Disapproving any approved course or program that fails to meet requirements set forth in federal law or criteria established by the approval agency and notifying the affected institution or establishment and the Veterans Administration of this disapproval. (4-1-97)~~

~~e. Providing applicable approval information to educational institutions or training establishments and the Department of Veterans' Affairs. (4-1-97)~~

~~02. Regulations Incorporated by Reference. The Federal regulations of the U.S. Department of Veterans' Affairs as referred to by these regulations are incorporated herein and will have the same force and effect as if fully set forth. Copies of referred federal regulations may be obtained from the United States Veterans Administration, the State Department of Education, or the Idaho State Law Library. (4-1-97)~~

~~03. Definition. For the purposes of these rules, the following words and phrases will have these meanings: (4-1-97)~~

~~a. Approval: An institution or establishment desiring to offer a course or courses for which veterans may use veterans' educational benefits has met standards and requirements designed to ensure that such institution or establishment is qualified to provide satisfactory instruction in the course or courses to be offered. (4-1-97)~~

~~b. Accredited Course: A course which meets one (1) of the following requirements: the course has been accredited and approved by a nationally recognized agency or association; credit for such a course is approved by the State Department of Education for credit toward a high school diploma; the course is conducted under 20 U.S.C. 11-28 (Vocational Education); and the course is accepted by the State Department of Education for credit for a teacher's certificate or a teacher's degree. (4-1-97)~~

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~~_____c._____ Nonaccredited courses: Courses that are not approved as accredited courses and that are offered by a public or private, profit or nonprofit, educational institution. These include nonaccredited courses offered by extension centers or vocational or adult education departments in institutions of higher education. (4-1-97)~~

~~_____d._____ Nationally recognized accrediting agency or association: One that appears on the list published by the Commissioner of Education as required by 38 U.S.C. 1775 (a). (4-1-97)~~

~~_____e._____ Correspondence courses: Courses that must require no less than six (6) hours of preparation per week over any twenty six (26) week period and must require six (6) or more months to complete. No more than twenty percent (20%) of the students pursuing such a course should be able to complete the course in less than six (6) months for the normal length to be certified as six (6) months or more. The determination of this factor will be based upon the records of the school for the immediately preceding years. (4-1-97)~~

~~_____f._____ Apprentice courses: Any training on the job course established as an apprentice course by a training establishment as defined in VA Regulations 14200(c) and approved as an apprentice course by the state approval agency. (4-1-97)~~

~~_____g._____ Other training on the job courses: Any training on the job that does not qualify as an apprentice course as defined in these regulations, but that otherwise meets the requirements of subparagraph C of VA Regulation 14262 as incorporated by reference herein. (4-1-97)~~

~~_____04._____ Eligibility for Receipt of Veterans' Educational Benefits. Any veteran enrolled in educational institutions or training establishments is eligible for educational benefits as provided by 38 U.S.C. Section 1771 et seq. To qualify for eligibility, the veteran must be in training in a course or courses approved for veteran's education by the state approval agency. (4-1-97)~~

~~_____05._____ Attainment of Approval Status. Attaining approval status requires that an institution or establishment desiring to offer courses for which veterans or other eligible persons may receive veterans' educational benefits meet standards designed to ensure that such an institution or establishment is qualified to provide satisfactory instruction in the course or courses to be offered. Approval of courses may be obtained upon compliance with the following requirements and standards: (4-1-97)~~

~~_____a._____ Veterans will not be eligible for educational benefits for enrollment in any course offered by an educational institution when such a course has been in operation for less than two (2) years immediately prior to the date of enrollment as defined by VA regulation 14251(B). However, this requirement does not apply to the following courses: courses pursued in a public or tax supported educational institution; any course offered by an educational institution that has been in operation for more than two (2) years, if the course is similar in nature to a course previously offered by the institution; any course that has been offered by an institution for a period of more than two (2) years, notwithstanding the fact that the institution has moved to another location in the same general locality or where the school has made a complete move with substantially the same faculty, curricula, and students without a change in ownership; any course offered by a nonprofit school of college level and recognized for credit toward a standard college degree; and any course for the educationally disadvantaged offered by a proprietary nonprofit educational institution at the principal or branch location when the institution offering the course has been in operation for more than two (2) years. (4-1-97)~~

~~_____b._____ Institutions or establishments desiring to enroll veterans or eligible persons in courses to which veterans' benefits may be applied must make written application for approval of such courses to the state approval agency. Because approval is granted on a course-by-course basis, the institution or establishment must include in the application all courses for which it seeks approval. Applications for approval of accredited courses must be in conformance with requirements set forth in VA Regulation 14253. Applications for approval of nonaccredited courses must be in conformance with and contain information required by VA Regulation 14254. Applications for approval of correspondence courses must conform with requirements set forth in VA Regulation 14256, in addition to the requirements of VA Regulations 14253 or 14254 as applicable. Applications for approval of apprentice courses must conform with and contain information required by VA Regulation 14261(B). Applications for approval of other~~

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~~training on the job courses must conform with and contain information required by VA Regulation 14262(B). Application for approval of flight training courses must conform with requirements set forth in VA Regulation 14263 and in particular VA Regulation 14263(F).~~ (4-1-97)

~~c. When an institution or establishment applies for approval, it thereby consents to visits by a representative of the state approval agency. The purpose of such visits is to determine whether the applicant and the course or courses for which approval is sought comply with established approval criteria.~~ (4-1-97)

~~d. Upon receipt of an application for approval conforming with the above referenced regulations, the state approval agency may, upon adequate investigation, approve the application when the course or courses to which the application pertains and the institution or establishment offering them are found to have met the following criteria: for accredited courses, criteria set forth in VA Regulation 14253(D) (E) or (F) as applicable; for nonaccredited courses, criteria set forth in VA Regulation 14254(C); for correspondence courses, criteria set forth in VA Regulation 14256; in addition to criteria set forth in VA Regulations 14253 or 14254 as applicable; for apprentice courses, criteria set forth in VA Regulation 14261(C); for other training on the job courses, criteria set forth in VA Regulation 14262(C); and for flight training courses, criteria set forth in VA Regulation 14263. Veterans who are basically eligible to receive educational assistance allowances under the provisions of Title 38, U.S.C. may receive educational assistance for flight training, if the individual also meets eligibility standards set forth in VA Regulation 14263(A). In addition, the state approving agency requires that students complete a minimum of thirty (30) hours of instruction per quarter to maintain such eligibility.~~ (4-1-97)

~~06. Notice of Approval. Upon determining that an institution or establishment has complied with all the requirements for approval, the state approval agency will notify the institution or establishment by a letter setting forth the courses that have been approved and will furnish the VA with an official copy of the letter, attachments and any subsequent amendments.~~ (4-1-97)

~~07. Length of Time of Approval. Approval of a course is for an indefinite period of time. However, the state approval agency may require that requests for continued approval be submitted on an annual basis with appropriate supporting documentation. Furthermore, any revision or change made in a course will require resubmission of the course for approval by the state approval agency.~~ (4-1-97)

~~08. Suspension or Withdrawal of Approval. Continuing approval of a course or courses is contingent upon maintaining prescribed standards and conformance with requirements referred to above.~~ (4-1-97)

~~a. In the event that the evidence of record establishes that the course fails to meet such requirements for approval, approval of the course for new enrollments may be suspended by the state approval agency for a period not to exceed sixty (60) days to allow the institution or establishment to meet the requirements for approval.~~ (4-1-97)

~~b. The length of the suspension will not be for an indeterminate period but will be of a reasonable duration as determined by the state approval agency to be necessary for the institution or establishment to meet the requirements in light of the nature of the deficiencies.~~ (4-1-97)

~~c. Prior to the effective date of the suspension, the state approval agency will give notice of the intended action to the affected institution or establishment which will include facts or circumstances on which the intended suspension is based and any available supporting documentation. The state approval agency will also afford to such institution or establishment, prior to the effective date of the suspension, a reasonable opportunity to show compliance with all lawful requirements for the retention of approval either by providing written support or through oral presentations to the appropriate agency officials.~~ (4-1-97)

~~d. For those cases where a discrepancy has not been corrected at the time of the expiration date of a suspension period or in lieu of suspension for those cases where a discrepancy is so major as to substantially deprive the student of the protection afforded by the approval process or is of such a nature that it cannot be corrected within a period of sixty (60) days, the state approval agency will withdraw approval of the affected course or courses.~~ (4-1-97)

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~~_____c._____ Prior to the effective date of the withdrawal of approval, notice of the agency's intended action will be provided to the affected institution or establishment, which will include a statement of the institution's right to a hearing, a statement of the authority and jurisdiction under which the hearing is to be held, a reference to the particular sections of statutes or rules involved, and a short and plain statement of the grounds upon which the intended action to withdraw approval is based. (4-1-97)~~

~~_____f._____ An opportunity will be afforded the affected institution or establishment to respond to the agency's intended action and to present evidence and argument on all issues involved. A three (3) member hearing panel will be appointed by the executive officer of the state approval agency to review such appeal and submit recommended findings of fact and conclusions of law to the executive officer who will thereafter render a final decision in the matter. (4-1-97)~~

~~_____g._____ Any final decision adverse to an institution or establishment will be in writing or stated in the record. The decision will include findings of fact and conclusions of law, separately stated. (4-1-97)~~

~~_____h._____ The affected institution or establishment will be notified either personally or by mail of any decision; a copy of this document will be delivered or mailed forthwith to the institution or establishment and to its attorney of record upon request. (4-1-97)~~

~~**701. --- 749. (RESERVED)**~~

~~**750. IDAHO STATE PENITENTIARY.**~~

~~The vocational and academic programs at the Idaho State Penitentiary will be approved on an annual basis as special programs for the purpose of training inmates. (4-1-97)~~

~~**751. --- 799. (RESERVED)**~~

~~**800. PRIVATE CORRESPONDENCE AND TRADE SCHOOLS.**~~

~~Private correspondence and trade schools teaching any course, plan, or programs of instruction, whether conducted in person, by mail, or any other method, will register with the State Department of Education on forms approved by the Board, which are on file in the State Department of Education. (Chapter 24, Title 33, Idaho Code) (4-1-97)~~

~~_____01. Cancellation Policy. A student applicant may cancel his or her enrollment within seventy two (72) hours after midnight of the day on which the enrollment agreement is signed and receive a full refund of all monies paid to the school or its representative. The student will receive a minimum of seven (7) days in which to cancel the enrollment agreement and the seller may retain not more than fifty dollars (\$50). Accreditation allows an agent to keep one hundred dollars (\$100). (4-1-97)~~

~~_____02. Cancellation of Enrollment. For a student requesting cancellation of enrollment after starting the course, the charge made will be based on lessons completed or time spent and will be computed on the following prorated basis: fifty percent (50%) retention during the first quarter; seventy five percent (75%) retention during the second quarter; and one hundred percent (100%) retention during the third and fourth quarter. (A quarter means time reasonably expected for completion of one fourth (1/4) of the course.) (4-1-97)~~

~~_____03. Emergency Consideration. In case of illness or accident, death in the family, or other circumstances beyond the control of the student, the student will be entitled to consideration, and the school will make a settlement that is reasonable and fair to both. (4-1-97)~~

801. CONTINUOUS IMPROVEMENT PLANNING AND TRAINING.

In accordance with Section 33-320, Idaho Code, every local education agency (LEA) shall develop and maintain a strategic plan that includes a continuous improvement process focused on improving student performance of the LEA. (3-25-16)

01. Definitions. (4-11-15)

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- a.** Administrator. As used in this section administrator means the superintendent of the school district or administrator of a charter school. (4-11-15)
- b.** Board. Board means the Idaho State Board of Education. (4-11-15)
- c.** Executive Director. Executive Director means the Executive Director of the Idaho State Board of Education. (4-11-15)
- d.** Local Education Agency Board. As used in this section local education agency or LEA Board means the board of trustees of a school district or board of directors of a charter school. (4-11-15)
- e.** Local Education Agency. As used in this section local education agency (LEA) means public school district or charter school. (4-11-15)
- f.** Continuous Improvement Plan. As used in this section, a continuous improvement plan focuses on annual measurable outcomes and the analysis of data to assess and prioritize needs and measure outcomes. (3-25-16)

02. Reimbursement Eligibility. LEA's may request reimbursement for training conducted pursuant to Section 33-320, Idaho Code. To be eligible for reimbursement the training and trainer must meet the following criteria: (4-11-15)

- a.** Training. The training must cover one (1) or more the follow subjects: (4-11-15)
- i.** Continuous improvement planning training. Continuous improvement planning training must include, but is not limited to, training on continuous process improvement, use and analysis of data, and methods for setting measurable targets based on student outcomes; (3-25-16)
- ii.** School finance; (4-11-15)
- iii.** Administrator evaluations, including, but not limited to, specifics on the Idaho state evaluation requirements and framework; (4-11-15)
- iv.** Ethics; or (4-11-15)
- v.** Governance. (4-11-15)
- b.** Documentation of Training. Training records shall be kept by the LEA showing: (4-11-15)
- i.** The length of the training in hours; (4-11-15)
- ii.** The subject(s) covered by the training; (4-11-15)
- iii.** The participants included in the training or validation of attendance of specific participants as applicable; and (4-11-15)
- iv.** The curriculum, agenda, or other documentation detailing the content of the training. (4-11-15)
- c.** Training Format. A majority of the LEA board and the administrator must collaborate on the continuous improvement plan and engage students, parents, educators and the community, as applicable to the training subject and format. The training facilitator must be physically present or have the ability to interact directly with all training participants. Sufficient time must be provided during the sessions to give the participants an opportunity to

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discuss issues specific to the LEA.

(3-25-16)

d. Trainer Qualifications. The trainer must meet the following qualifications: (4-11-15)

i. May not be a current employee of the LEA; (4-11-15)

ii. Must have two (2) years of documented training experience in the area of training being provided for the LEA; and (4-11-15)

iii. Must provide at least three (3) recommendations from individuals who participated in past training sessions conducted by the trainer. These recommendations must be included with the application to determine the trainer's qualifications. (4-11-15)

e. Qualified Trainers. Trainer qualifications will be determined by the Office of the State Board of Education. The State Board of Education will maintain a list of qualified trainers and the subject areas in which they are qualified. (4-11-15)

i. An individual or company may submit an application for consideration to be placed on the list of qualified trainers or the LEA may submit the application on behalf of the individual or company. (4-11-15)

ii. Applications must be submitted to the Executive Director in a format established by the Executive Director. (4-11-15)

iii. Trainer qualifications must be determined prior to the LEA's request for reimbursement of training costs. (4-11-15)

03. Audit. If requested, LEA's must provide training documentation or other information to verify eligibility prior to reimbursement. (4-11-15)

~~**04. Statewide Continuous Improvement Measures.** Multiple measures must be used to fully determine student readiness and improvement. At a minimum each continuous improvement plan shall include the following statewide student readiness and improvement metrics. The benchmark for each metric shall be set by the LEA. (3-22-17)~~

~~**a.** The college and career readiness metric shall be the number and percentage of students meeting the college-ready benchmark in mathematics and English Language Arts on a state-recognized college entrance exam. Improvement shall be measured by year-over-year growth in the percentage of students meeting the college-readiness benchmark. This measure may be broken out by students pursuing a career technical track and non-career technical track students. Career technical track student's readiness will be measured based on students receiving an industry-recognized certification or passage of a Division of Career Technical Education recognized workplace readiness assessment. (3-22-17)~~

~~**b.** The high school readiness metric shall be the number and percentage of students meeting proficient or advanced on the grade eight (8) Idaho standards achievement test in mathematics and English language usage. Improvement shall be measured by year-over-year growth in the percentage of students scoring proficient or advanced. (3-22-17)~~

~~**c.** The grade seven (7) readiness metric shall be the number and percentage of students meeting proficient or advanced on the grade six (6) Idaho standards achievement test in mathematics and English language usage. Improvement shall be measured by year-over-year growth in the percentage of students scoring proficient or advanced. (3-22-17)~~

~~**d.** The grade four (4) reading readiness metric shall be the number and percentage of students reading at grade level on the spring grade three (3) statewide reading assessment. Improvement shall be measured by year-over-year growth in the percentage of students scoring at grade level. (3-22-17)~~

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~~_____e._____The grade three (3) reading readiness metric shall be the number and percentage of students reading at grade level on the spring grade two (2) statewide reading assessment. Improvement shall be measured by year over year growth in the percentage of students scoring at grade level. (3-22-17)~~

~~_____f._____The grade two (2) reading readiness metric shall be the number and percentage of students reading at grade level on the spring grade one (1) statewide reading assessment. Improvement shall be measured by year over year growth in the percentage of students scoring at grade level. (3-22-17)~~

~~_____g._____The grade one (1) reading readiness metric shall be the number and percentage of students reading at grade level on the spring kindergarten statewide reading assessment. Improvement shall be measured by year over year growth in the percentage of students scoring at grade level. (3-22-17)~~

0504. Annual Literacy Intervention Plan. Annually each LEA will report on the effectiveness of the LEA's literacy intervention plan. Plans and reports are due by October 1 of each year. Plans shall include at a minimum: (3-22-17)

- a.** Projected literacy plan budget for the current school year; (3-22-17)
- b.** Metrics chosen by the LEA to determine effectiveness of the literacy plan and annual performance benchmarks; and (3-22-17)
- c.** Performance on metrics chosen to show program effectiveness for at a minimum the previous academic year. (3-22-17)

0605. College and Career Advising and Mentoring Plans. Annually each LEA shall submit their college and career advising and mentoring plan to the State Board of Education by October 1. (3-22-17)

- a.** Plans shall include required metrics and at least one (1) or more additional metrics chosen by the LEA to determine effectiveness of the college and career advising and mentoring plan, baseline data and annual benchmarks. (3-22-17)
- b.** Performance on all effectiveness metrics shall be reported annually in the LEA's Continuous Improvement Plan annual report. (3-22-17)
- c.** At a minimum effectiveness metrics must include: (3-22-17)
 - i.** Percent of learning plans reviewed annually by grade level, in grade nine (9) through grade twelve (12); (3-22-17)
 - ii.** Number and percent of students who go on to some form of postsecondary education one (1) and two (2) years after graduation; and (3-22-17)
 - iii.** Number of students graduating high school with a career technical certificate or an associate degree. (3-22-17)

802. LITERACY GROWTH TARGETS.

01. Statewide Trajectory Growth Targets. Statewide trajectory annual growth targets are based on aggregated student performance on the spring administration of the statewide reading assessments. Local growth targets are set by the LEA based on the LEA's available resources and student demographics. Statewide trajectory growth targets indicated the statewide goal for year over year increases in the percentage of students reading at grade level. (3-29-17)

- a.** Year one (1) and two (2): (3-29-17)

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- i. Kindergarten -- one percent (1%). (3-29-17)
- ii. Grade one (1) -- one percent (1%). (3-29-17)
- iii. Grade two (2) -- one percent (1%). (3-29-17)
- iv. Grade three (3) -- one percent (1%). (3-29-17)
- b.** Year three (3), four (4), five (5), and six (6): (3-29-17)
 - i. Kindergarten -- one point eight percent (1.8%). (3-29-17)
 - ii. Grade one (1) -- two percent (2%). (3-29-17)
 - iii. Grade two (2) -- one point six percent (1.6%). (3-29-17)
 - iv. Grade three (3) -- one point two percent (1.2%). (3-29-17)

02. Annual Review. The State Board of Education will review the statewide student proficiency levels and the statewide trajectory growth targets annually. (3-29-17)

803. STATEWIDE AVERAGE CLASS SIZE.

For the purpose of determining the statewide average class size used in school district staff allowance calculations, school districts shall be grouped as follows: (3-29-17)

01. Group 1. Group 1 shall consist of school districts with an elementary divisor, pursuant to Section 33-1004, Idaho Code, of twenty (20) for grades one (1) through three (3) and twenty-three (23) for grades four (4) through six (6), and a secondary divisor of eighteen point five (18.5.) (3-29-17)

02. Group 2. Group 2 will consist of school districts with an elementary divisor, pursuant to Section 33-1004, Idaho Code, of twenty (20) for grades one (1) through three (3) and twenty-three (23) for grades four (4) through six (6), and a secondary divisor less than eighteen point five (18.5.) (3-29-17)

03. Group 3. Group 3 will consist of school districts with elementary divisors, pursuant to Section 33-1004, Idaho Code, of nineteen (19) or twenty (20) for grades one (1) through six (6), and a secondary divisor of less than eighteen point five (18.5.) (3-29-17)

04. Group 4. Group 4 will consist of school districts with elementary divisors, pursuant to Section 33-1004, Idaho Code, of less than nineteen (19) for grades one (1) through six (6), and a secondary divisor of less than eighteen point five (18.5.) (3-29-17)

804. -- 999. (RESERVED)

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SUBJECT

Proposed Rule, Docket Number 08-0202-1903 – Rules Governing Uniformity – Juvenile Detention Centers

APPLICABLE STATUTE, RULE, OR POLICY

Sections 33-2009, Idaho Code
Executive Order 2019-02

BACKGROUND/DISCUSSION

Section 33-2009, Idaho Code, requires each public school within the state to provide educational services to students held in juvenile detention centers within their attendance area. As part of the Administrative Code review mandated by Executive Order 2019-02, two references were identified in IDAPA 08.02.02 referencing federal definitions were identified as unnecessary and obsolete. The proposed amendments remove these two definitions from Administrative Code.

IMPACT

Approval of the proposed rule will bring the rule in alignment with Section 33-2009, Idaho Code and remove obsolete language from Administrative Code.

ATTACHMENTS

Attachment 1 – Proposed Rule, Docket Number 08-0202-1903

STAFF COMMENTS AND RECOMMENDATIONS

Administrative rules are made up of three types of rules, temporary rules, proposed rules and pending rules. Temporary and proposed rules may be promulgated jointly with a single docket number or temporary rules may be promulgated as a standalone rule. The Notice of Intent to Promulgate Rules was published in the July 6, 2019 (Vol 19-7) Idaho Administrative Rules Bulletin. Staff received no requests to participate in the negotiated rulemaking process.

Proposed rules approved by the Board are published in the Idaho Administrative Rules Bulletin. Following publication there is a 21-day comment period. Based on received comments and Board direction, changes may be made to proposed rules prior to entering the pending stage. Pending rules are then brought back to the Board for consideration. Once approved, pending rules will be submitted to the Department of Administration for publication in the Idaho Administrative Rules Bulletin and are then forwarded to the legislature for consideration. Pending rules become effective at the end of the legislative session in which they are submitted, if they are not rejected by the Legislature.

Staff recommends approval.

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BOARD ACTION

I move to approve the proposed rule amendments, docket number 08-0202-1903,
as submitted in Attachment 1.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

IDAPA 08
TITLE 02
CHAPTER 02

08.02.02 – RULES GOVERNING UNIFORMITY

(BREAK IN CONTINUITY OF SECTIONS)

240. JUVENILE DETENTION CENTERS.

~~01. Definition of Terms. (4-1-97)~~

~~a. Juvenile Detention Centers: Facilities that provide for the temporary care of children, as defined in the Juvenile Justice Reform Corrections Act, who require secure custody, for their own or the community's protection, in physically restricting facilities pending court disposition or subsequent to court disposition. (Section 33-2009, Idaho Code) (4-1-97)~~

~~b. Juvenile Offender: A person, as defined in the Juvenile Justice Reform Act, who has been petitioned or adjudicated for a delinquent act that would constitute a felony or misdemeanor if committed by an adult. (4-1-97)~~

02. Instructional Program. Every public school district in the state within which is located a public or private detention facility housing juvenile offenders pursuant to court order will provide an instructional program. The instructional program will: (4-1-97)

- a.** Provide course work that meets the minimum requirements of Idaho State Board of Education Rules. (4-1-97)
- b.** Provide instruction in ~~the core~~ ~~of instruction~~ subject areas. (4-1-97)
- c.** Include the following components, where appropriate: self-concept improvement, social adjustment, physical fitness/personal health, vocational/occupational, adult living skills, and counseling. (4-1-97)
- d.** Provide instruction and guidance that may lead to a high school diploma. School districts will accept such instruction for purposes of issuing credit when the detention center certifies to the school that the appropriate work is completed. (4-1-97)
- e.** Be directed by an instructor who holds an appropriate, valid certificate. (4-1-97)
- f.** Be provided to each student not later than two (2) school days after admission and continue until the student is released from the detention center. (4-1-97)
- g.** Be provided to students who have attained "school age" as defined in Idaho Code 33-201. (4-1-97)
- h.** Be provided for a minimum of four (4) hours during each school day. (4-1-97)
- i.** Be based on the needs and abilities of each student. The resident school district will provide pertinent status information as requested by the Juvenile Detention Center. (4-1-97)
- j.** Be coordinated with the instructional program at the school the student attends, where appropriate. (4-1-97)
- k.** Be provided in a facility that is adequate for instruction and study. (4-1-97)

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ATTACHMENT 1

03. State Funding of Instructional Programs at Juvenile Detention Centers. (4-1-97)

a. Every student housed in a juvenile detention center pursuant to court order and participating in an instructional program provided by a public school district will be counted as an exceptional child by the district for purposes of state reimbursement. (4-1-97)

b. Public school districts that educate pupils placed by Idaho court order in juvenile detention centers will be eligible for an allowance equivalent to the previous year's certified local annual tuition rate per pupil. The district allowance will be in addition to support unit funding and included in the district apportionment payment. (4-1-97)

c. To qualify for state funding of instructional programs at Juvenile Detention Centers, school districts must apply for such funding on forms provided by the State Department of Education. Applications are subject to the review and approval of the State Superintendent of Public Instruction. School districts will submit attendance and enrollment reports as required by the State Superintendent of Public Instruction. Juvenile Detention Centers will submit reports to the local school district as required. (4-1-97)

241. -- 999. (Reserved)

DIVISION OF CAREER TECHNICAL EDUCATION

SUBJECT

Proposed Rule Docket No. 08-0203-1901, Rules Governing Thoroughness, Incorporated by Reference - Career Technical Education Program Content Standards

REFERENCE

June 2016	Board approved the career technical secondary program standards.
August 2016	Board approved proposed rule incorporating career technical content standards into Administrative Code.
November 28, 2016	Board approved pending rule incorporating career technical content standards into Administrative Code.
August 31, 2017	Board approved proposed rule incorporating additional career technical content standards into Administrative Code.
November 2017	Board approved pending rule incorporating career technical content standards into Administrative Code.
August 2018	Board approved proposed rule Docket 08-0203-1804, incorporating career technical content standards into Administrative Code.
November 2018	Board approved pending rule Docket 08-0203-1804, incorporating career technical content standards into Administrative Code.

APPLICABLE STATUTE, RULE, OR POLICY

Section 33-118, Idaho Code
Section 33-1612, Idaho Code
Section 33-2211, Idaho Code
Idaho Administrative Code, IDAPA 08.02.03, Rules Governing Thoroughness

ALIGNMENT WITH STRATEGIC PLAN

GOAL 1: EDUCATIONAL SYSTEM ALIGNMENT, Objective B: Alignment and Coordination; GOAL 3: EDUCATIONAL ATTAINMENT; Objective A: Higher Level of Educational Attainment; GOAL 4: WORKFORCE READINESS; Objective A: Workforce Alignment

BACKGROUND/DISCUSSION

Similar to academic programs, content standards exist for secondary career technical programs. These content standards are developed with secondary and postsecondary instructors and industry representatives by the Division of Career Technical Education (Division). Postsecondary instructors provide guidance into the postsecondary program alignment, and industry representatives validated the outcomes with current needs of the particular industry occupations supported by the program.

Once the career technical standards and student learning outcomes are developed and vetted through the initial development team, the learning outcomes are shared with a larger group of industry representatives. The Division asks industry representatives to rank each learning outcome as to their importance in the workplace. Each learning outcome is then scored and reflected in the program's technical skills assessment based on the level of criticality established by the representative community.

Each career technical program is evaluated regularly by the Division and held to these standards. Prior to 2016 these standards were standalone documents updated and maintained by the Division. To be consistent with the academic content standards, during the 2016 rulemaking the Division started the process of bringing the career technical content standards forward for incorporation into Administrative Code. The standards being considered this year add or updated the following subcategories into the current content standard areas:

- Agriculture and Natural Resources
 - Food Science and Processing Technology - new
- Business and Marketing Education
 - Hospitality Management - new
- Engineering and Technology
 - Computer Support - updated
- Health Sciences
 - Rehabilitation Services - new
- Skilled and Technical Sciences
 - Electrical Apprenticeship – new
 - HVAC Apprenticeship – new
 - Plumbing Apprenticeship - new

IMPACT

Approval of the proposed rule changes will add additional career technical education subcategories into the existing content standard areas and update content standards previously approved by the Board.

ATTACHMENTS

Attachment 1 – Proposed Rule Docket No. 08-0203-1901
Attachment 2 – Agricultural and Natural Resources Content Standards
Attachment 3 – Business and Marketing Education Content Standards
Attachment 4 – Engineering and Technology Education Content Standards
Attachment 5 – Health Sciences Content Standards
Attachment 6 – Skilled and Technical Sciences Content Standards

STAFF COMMENTS AND RECOMMENDATIONS

The notice of intent to promulgate this rule was published in the July 6, 2019 (Vol.19-7) Administrative Bulletin. No requests were received to negotiate this

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rule beyond the Division's initial process.

Once approved by the Board, proposed rules are submitted to the Department of Administration for publication in the Idaho Administrative Bulletin, once published there is a 21-day comment period. Based on comments received and Board direction, changes may be made to proposed rules prior to entering the pending stage. Pending rules are then brought back to the Board for consideration. If approved, pending rules are resubmitted for publication in the Idaho Administrative Rules Bulletin and are then forwarded to the Legislature for consideration. Pending rules become effective at the end of the legislative session in which they are submitted if they are not rejected by the Legislature.

Staff recommends approval.

BOARD ACTION

I move to approve amendments to the career technical education content standards as submitted in attachments 2 through 6.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

I move to approve proposed rule Docket 08-0203-1901, as submitted in Attachment 1.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

**IDAPA 08
TITLE 02
CHAPTER 03**

08.02.03 – RULES GOVERNING THOROUGHNESS

(BREAK IN CONTINUITY OF SECTIONS)

004. INCORPORATION BY REFERENCE.

The following documents are incorporated into this rule: (3-30-07)

01. The Idaho Content Standards. The Idaho Content Standards as adopted by the State Board of Education. Individual subject content standards are adopted in various years in relation to the curricular materials adoption schedule. Copies of the document can be found on the State Board of Education website at <https://boardofed.idaho.gov>. (3-29-10)

- a.** Arts and Humanities Categories: (3-24-17)
 - i. Dance, as revised and adopted on August 11, 2016; (3-24-17)
 - ii. Interdisciplinary Humanities, as revised and adopted on August 11, 2016; (3-24-17)
 - iii. Media Arts, as adopted on August 11, 2016. (3-24-17)
 - iv. Music, as revised and adopted on August 11, 2016; (3-24-17)
 - v. Theater, as revised and adopted on August 11, 2016; (3-24-17)
 - vi. Visual Arts, as revised and adopted on August 11, 2016; (3-24-17)
 - vii. World languages, as revised and adopted on August 11, 2016. (3-24-17)
- b.** Computer Science, adopted on November 28, 2016. (3-24-17)
- c.** Driver Education, as revised and adopted on August 10, 2017. (3-28-18)
- d.** English Language Arts/Literacy, as revised and adopted on November 28, 2016. (3-24-17)
- e.** Health, as revised and adopted on August 11, 2016. (3-24-17)
- f.** Information and Communication Technology, as revised and adopted on August 10, 2017. (3-28-18)
- g.** Limited English Proficiency, as revised and adopted on August 21, 2008. (3-29-10)
- h.** Mathematics, as revised and adopted on August 11, 2016. (3-24-17)
- i.** Physical Education, as revised and adopted on August 11, 2016. (3-24-17)
- j.** Science, as revised and adopted on August 10, 2017. (3-28-18)
- k.** Social Studies, as revised and adopted on November 28, 2016. (3-24-17)
- l.** College and Career Readiness Competencies adopted on June 15, 2017. (3-28-18)

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- m.** Career Technical Education Categories: (3-29-17)
- |
- i. Agricultural and Natural Resources, as revised and adopted on August ~~16, 2018~~ 29, 2019. (4-11-19)
- |
- ii. Business and Marketing Education, as revised and adopted on August ~~31, 2017~~ 29, 2019. (3-28-18)
- |
- iii. Engineering and Technology Education, as revised and adopted on August ~~16, 2018~~ 29, 2019. (4-11-19)
- |
- iv. Health Sciences, as adopted on August ~~16, 2018~~ 29, 2019. (4-11-19)
- |
- v. Family and Consumer Sciences, as revised and adopted on August 16, 2018. (4-11-19)
- |
- vi. Skilled and Technical Sciences, as revised and adopted on ~~August 16, 2018~~ 29, 2019. (4-11-19)
- |
- vii. Workplace Readiness, as adopted on June 16, 2016. (3-29-17)

02. The English Language Development (ELD) Standards. The World-Class Instructional Design and Assessment (WIDA) 2012 English Language Development (ELD) Standards as adopted by the State Board of Education on August 16, 2012. Copies of the document can be found on the WIDA website at www.wida.us/standards/eld.aspx. (4-4-13)

03. The Idaho English Language Proficiency Assessment (ELPA) Achievement Standards. The Idaho English Language Proficiency Assessment (ELPA) Achievement Standards as adopted by the State Board of Education on October 18, 2017. Copies of the document can be found on the State Board of Education website at <https://boardofed.idaho.gov>. (3-28-18)

04. The Idaho Standards Achievement Tests (ISAT) Achievement Level Descriptors. Achievement Level Descriptors as adopted by the State Board of Education on April 14, 2016. Copies of the document can be found on the State Board of Education website at <https://boardofed.idaho.gov>. (3-29-17)

05. The Idaho Extended Content Standards. The Idaho Extended Content Standards as adopted by the State Board of Education on August 10, 2017. Copies of the document can be found at the State Board of Education website at <https://boardofed.idaho.gov>. (3-28-18)

06. The Idaho Content Standards Core Content Connectors. The Idaho Content Standards Core Content Connectors as adopted by the State Board of Education on August 10, 2017. Copies of the document can be found at the State Board of Education website at <https://boardofed.idaho.gov>. (3-28-18)

a. English Language Arts, as adopted by the State Board of Education on August 10, 2017. (3-28-18)

b. Mathematics, as adopted by the State Board of Education on August 10, 2017. (3-28-18)

07. The Idaho Alternate Assessment Achievement Standards. Alternate Assessment Achievement Standards as adopted by the State Board of Education on October 18, 2017. Copies of the document can be found on the State Board of Education website at <https://boardofed.idaho.gov>. (3-28-18)

08. The Idaho Standards for Infants, Toddlers, Children, and Youth Who Are Deaf or Hard of Hearing. As adopted by the State Board of Education on October 11, 2007. Copies of the document can be found on the State Board of Education website at <https://boardofed.idaho.gov>. (4-2-08)

09. The Idaho Standards for Infants, Toddlers, Children, and Youth Who Are Blind or Visually Impaired. As adopted by the State Board of Education on October 11, 2007. Copies of the document can be found

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on the State Board of Education website at <https://boardofed.idaho.gov>.

(4-2-08)

10. The Idaho Special Education Manual. The Idaho Special Education Manual as adopted by the State Board of Education on October 17, 2018. Copies of the document can be found on the State Board of Education website at <https://boardofed.idaho.gov>.

(4-11-19)

(BREAK IN CONTINUITY OF SECTIONS)

FOOD SCIENCE & PROCESSING TECHNOLOGY

PROGRAM STANDARDS

2018

CONTENT STANDARD 1.0: FOOD INDUSTRY AND HISTORICAL DEVELOPMENT

Performance Standard 1.1: Evaluate the Significance and Implications of Changes and Trends in the Food Products and Processing Industry

- 1.1.1 Discuss historical changes in the food products and processing industry.
- 1.1.2 Evaluate current trends in the food products and processing industry (e.g., dietary food guides, niche markets, marketing trends).
- 1.1.3 Identify consumer concerns related to food quality and safety (such as allergens, antibiotic use, genetically modified organisms (GMOs), pesticide use, and food borne illnesses).
- 1.1.4 Discuss the economic implications when low-quality and unsafe foods enter the market.
- 1.1.5 Describe the scope and economic importance of agriculture and food processing in the United States and the world, using quantitative data compiled by government agencies and news media.
- 1.1.6 Examine the impact of consumer trends on food products and processing practices (e.g., health and nutrition, organic, information about food products, local food movements, farm-to-fork supply chains, food system transparency).
- 1.1.7 Compare and contrast cultural differences regarding food products and processing practices.
- 1.1.8 Identify and explain environmental and safety concerns about the food supply.
- 1.1.9 Evaluate desirable and undesirable outcomes of emerging technologies used in the food products and processing industry.

Performance Standard 1.2: Investigate Industry Organizations, Groups, and Regulatory Agencies Affecting the Food Products and Processing Industry

- 1.2.1 Explain the purposes of organizations that are part of and/or regulate the food products and processing industry.
- 1.2.2 Determine the relationship between regulatory agencies (i.e., FDA, USDA, CDC, WHO) and the food products and processing industry.
- 1.2.3 Assess the changes in the food products and processing industry brought about by industry organizations or regulatory agencies.

CONTENT STANDARD 2.0: FOOD SAFETY AND SANITATION

Performance Standard 2.1: Create Sanitation Standard Operating Procedures and Master Sanitation Schedules

- 2.1.1 Create Sanitation Standard Operating Procedures (SSOP) for a food processing company.
- 2.1.2 Understand Good Manufacturing Practices (GMP) and how they relate to a food processing company and employee and equipment hygiene.
- 2.1.3 Create Master Sanitation Schedule (MSS) for a food processing company.

Performance Standard 2.2: Create a Food Safety Plan, Understand the Biological, Chemical, and Physical Hazards Associated with Food Processing and Handling

FOOD SCIENCE & PROCESSING TECHNOLOGY

PROGRAM STANDARDS

2018

- 2.2.1 Understand and evaluate the different biological hazards (prions, bacteria, viruses, protozoans, etc.) that could be present in the raw ingredient through processing and distribution of a food product.
- 2.2.2 Understand and evaluate the different chemical hazards (pesticides, herbicides, allergens, paints, heavy metals, dioxins, PCBs, etc.) that could be present in the raw ingredient through processing and distribution of a food product.
- 2.2.3 Understand and evaluate the different physical hazards (metal, plastic, rubber, etc.) that could be present in the raw ingredient through processing and distribution of a food product.
- 2.2.4 Identify potential sources of contamination.
- 2.2.5 Develop strategies to eliminate or reduce contamination to an acceptable level.
- 2.2.6 Discuss current regulatory food safety programs, including HACCP (Hazard Analysis Critical Control Point), FSP (Food Safety Plan), and Food Defense.

Performance Standard 2.3: Apply Sanitation Procedures in the Handling, Processing, and Storing of Food Products

- 2.3.1 Evaluate food product handling procedures.
- 2.3.2 Explain the importance of microbiological tests (e.g., ATP, equipment swabs, Environmental swab, Pathogen Environmental Monitoring -PEM) in food sanitation verification.
- 2.3.3 Explain the importance of allergen cross-contact and how sanitation affects allergen management.
- 2.3.4 Discuss documentation procedures and their importance in a food processing and distribution system.
- 2.3.5 Understand how Clean in Place (CIP) and Clean Out of Place (COP) affects overall sanitation of a facility.
- 2.3.6 Understand the use of chemical types and applications and how it affects plant sanitation procedures.

CONTENT STANDARD 3.0: PERSONAL SAFETY

Performance Standard 3.1: Understand Worker Safety Principles in a Manufacturing Facility

- 3.1.1 Outline guidelines for personnel safety in the food products and processing industry (e.g., lockout-tagout, personal protective equipment, permit required confined space, machine guarding, walking working surfaces, motorized vehicles).
- 3.1.2 Perform a safety risk analysis of a manufacturing facility, including behavior based accident preventions.
- 3.1.3 Create mitigation strategies (engineering, administrative, and PPE) focusing on controls.
- 3.1.4 Demonstrate the ability to follow safety and operational procedures in a lab setting and satisfactorily complete a safety test.

CONTENT STANDARD 4.0: THE SCIENCE OF FOOD PRODUCTS

Performance Standard 4.1: Apply Principles of Science to Provide a Safe, Wholesome, and Nutritious Food Supply

FOOD SCIENCE & PROCESSING TECHNOLOGY

PROGRAM STANDARDS

2018

- 4.1.1 Design a research project in food science using the scientific method.
- 4.1.2 Examine, interpret, and explain the meaning of required components on a food label.
- 4.1.3 Determine a strategy to prepare and label foods according to the established standards of regulatory agencies (including nutrition facts panel, ingredients, weights, and measures, allergens, etc.).

Performance Standard 4.2: Evaluate, Grade, and Classify Processed Food Products

- 4.2.1 Perform quality control inspections of raw and finished food products.
- 4.2.2 Explain how the chemical and physical properties of foods influence nutritional value and eating quality.
- 4.2.3 Compare and contrast foods stored under varying conditions for quality, shelf life, and intended use.
- 4.2.4 Design and construct experiments for quality assurance tests on food products.
- 4.2.5 Interpret and evaluate results of quality assurance tests on food products and examine steps to implement corrective procedures.

Performance Standard 4.3: Understand the Constituents of Food (e.g., Lipids, Proteins, Carbohydrates, Water, Vitamins, Minerals)

- 4.3.1 Differentiate between the common food constituents (i.e., proteins, carbohydrates, fats, vitamins, minerals, and water).
- 4.3.2 Compare and contrast food constituents and their relative value to product taste, appearance, and so forth.
- 4.3.3 Research and report methods of nutritional planning to meet essential needs for the human diet (e.g., MyPlate).

Performance Standard 4.4: Understand and Recognize the Different Additives in Food and Purposes of Use in Processing

- 4.4.1 Identify common food additives and identify their properties (e.g., preservatives, antioxidants, buffers, stabilizers, colors, flavors).
- 4.4.2 Describe the purpose of common food additives (CFA).
- 4.4.3 Describe how CFAs influence the chemistry of food.

Performance Standard 4.5: Research and Development

- 4.5.1 Identify the steps of research and development in the food production and processing industry.
- 4.5.2 Outline the process for designing a new food product from concept to production.
- 4.5.3 Identify the needs and mechanics of a plant scale test.

CONTENT STANDARD 5.0: FOOD PROCESSING OPERATIONS AND TECHNOLOGY

Performance Standard 5.1: Process Food and Food Products for Sale and Distribution

- 5.1.1 Understand principles of raw material/ingredient receiving.
- 5.1.2 Create a flow diagram for food production process steps.
- 5.1.3 Identify packaging processes and logistics (e.g., sub packaging, case filling, palletizing).
- 5.1.4 Understand principles of production scheduling, product storage, and distribution.

Performance Standard 5.2: Preserve Food and Food Products for Sale and

FOOD SCIENCE & PROCESSING TECHNOLOGY PROGRAM STANDARDS

2018

Distribution

- 5.2.1 Describe factors related to food preservation.
- 5.2.2 Describe factors that contribute to food deterioration.
- 5.2.3 Preserve foods using various methods and techniques.
- 5.2.4 Identify and summarize purposes of food storage procedures (e.g. temperature regulation, monitoring).
- 5.2.5 Prepare plans that ensure implementation of proper food storage procedures and traceability.
- 5.2.6 Differentiate between methods and materials used for processing food for different markets (e.g., fresh food products, ready to eat food products, organic).

Performance Standard 5.3: Food Process Technology and Maintenance

- 5.3.1 List and categorize types of equipment used in food products and processing systems including automated systems.
- 5.3.2 List and apply strategies to maintain equipment and facilities for food products and processing systems (Preventative Maintenance).
- 5.3.3 Describe Piping and Instrumentation Diagrams as they relate to food processing.
- 5.3.4 Describe the principles of Operational Technology (OT) and how they relate to larger Information Systems (Big Data Analytics, Statistical Process Control).
- 5.3.5 Identify the role of Robotics in Food Processing and Packaging.

CONTENT STANDARD 6.0: EXPLORE CAREER OPPORTUNITIES

Performance Standard 6.1: Understand Employment Fields in the Food Science Technology Industry

- 6.1.1 Identify potential careers in the food science and processing industry.
- 6.1.2 Interview current food science/processing professionals.
- 6.1.3 Demonstrate employability skills for a career in the food science and processing industry (e.g., create a resume and cover letter, participate in job interviews).
- 6.1.4 Research additional industry certifications available (i.e., Serve safe, HACCP, OSHA, PCQI).

CONTENT STANDARD 7.0: LEADERSHIP TRAINING THROUGH AGRICULTURAL EDUCATION

Performance Standard 7.1: Recognize the Traits of Effective Leaders and Participate in Leadership Training through Involvement in FFA

- 7.1.1 Demonstrate effective leadership and participation in leadership training.
- 7.1.2 Expand leadership experience by participating in a chapter activity.
- 7.1.3 Participate in a career development event at the local level or above.
- 7.1.4 Exhibit leadership skills by demonstrating proper parliamentary procedure.
- 7.1.5 Participate in a speech or presentation activity.

Performance Standard 7.2: Understand the Importance of School and Community Awareness

- 7.2.1 Participate in a school improvement or community development project.

CONTENT STANDARD 8.0: SUPERVISED AGRICULTURAL EXPERIENCE (SAE)

FOOD SCIENCE & PROCESSING TECHNOLOGY PROGRAM STANDARDS

2018

Performance Standard 8.1: Maintain a Supervised Agricultural Experience

- 8.1.1 Accurately maintain SAE record books.
- 8.1.2 Investigate the proficiency award areas related to SAE program area.
- 8.1.3 Actively pursue necessary steps to receive higher degrees in FFA.

IDAHO HOSPITALITY MANAGEMENT PROGRAM STANDARDS

2018

CONTENT STANDARD 1.0: HOSPITALITY BUSINESS RELATIONS MANAGEMENT

Performance Standard 1.1: Organizational Culture of the Hospitality

Industry

- 1.1.1 Demonstrate professional techniques of communication.
- 1.1.2 Demonstrate professional, effective digital, written, verbal, and non-verbal communication skills.
- 1.1.3 Demonstrate professional presentation and public speaking skills.
- 1.1.4 Demonstrate positive communication in the workplace.
- 1.1.5 Demonstrate effective listening skills.
- 1.1.6 Model effective conflict prevention and resolution skills.
- 1.1.7 Identify types of organizational culture.

Performance Standard 1.2: Internal Operations Communication

- 1.2.1 Demonstrate knowledge of the concepts, strategies, and systems used to obtain and convey ideas and information using occupational terminology.
- 1.2.2 Demonstrate professional communication between employee, supervisor, and co-workers.
- 1.2.3 Identify culture and social awareness.

Performance Standard 1.3: Hospitality Law and Ethics

- 1.3.1 Recognize the community impact of unethical behavior.
- 1.3.2 Identify benefits of community-minded whistleblowers.
- 1.3.3 Demonstrate an understanding of guest privacy and information protection.
- 1.3.4 Identify ethical behavior within an organizational culture.

Performance Standard 1.4: Current Trends

- 1.4.1 Investigate current trends in the hospitality industry.
- 1.4.2 Evaluate the effects of current trends in the hospitality industry.
- 1.4.3 Recognize the impact of technology trends in the hospitality industry.
- 1.4.4 Describe the impact of globalization and diversity on the hospitality industry.
- 1.4.5 Investigate current legal and political trends in the hospitality industry.
- 1.4.6 Recognize the personal needs of all guests, employees, and stakeholders, including those needing special accommodations (e.g., language, health, Americans with Disabilities Act [ADA] requirements, and so forth).

CONTENT STANDARD 2.0: HOSPITALITY BUSINESS STRUCTURE AND CHARACTERISTICS

Performance Standard 2.1: Operations Management

- 2.1.1 Create safety and security procedures.
- 2.1.2 Define and describe logistics within operations management.
- 2.1.3 Understands tools, strategies, and systems used to maintain, monitor, control, and plan the use of human resources, equipment, and logistics.
- 2.1.4 Monitor, plan, and control day-to-day activities.

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- 2.1.5 Assess asset management and inventory control.

Performance Standard 2.2: Project Management

- 2.2.1 Identify Project Management Institute (PMI) terminology.
- 2.2.2 Understand contract management deliverables within scope of given project.
- 2.2.3 Describe a project manager's role.
- 2.2.4 Define the phases of project management.
- 2.2.5 Evaluate phases of project management from concept to completion.

Performance Standard 2.3: Facilities Management

- 2.3.1 Demonstrate knowledge of and locate compliance and regulations at local, state, and national levels.
- 2.3.2 Describe the structure and duties of housekeeping, maintenance, and construction.
- 2.3.3 Explain asset condition assessment.
- 2.3.4 Create a preventative maintenance program for facilities.

Performance Standard 2.4: Events Management

- 2.4.1 Recognize and explain the planning of a variety of events.
- 2.4.2 Create a pre-through-post event logistics plan.

CONTENT STANDARD 3.0: DIGITAL LITERACY IN HOSPITALITY

Performance Standard 3.1: Hospitality Technology Tools

- 3.1.1 Demonstrate the use of financial accounting software.
- 3.1.2 Demonstrate the use of word processing, spreadsheet and presentation applications.
- 3.1.3 Demonstrate the use of cloud-based technologies.
- 3.1.4 Demonstrate the use of graphic design applications.
- 3.1.5 Demonstrate the use of project management software.

CONTENT STANDARD 4.0: HOSPITALITY FINANCE AND ECONOMIC IMPACT

Performance Standard 4.1: Finance

- 4.1.1 Explain a depreciation schedule.
- 4.1.2 Read and interpret financial statements.
- 4.1.3 Explain revenue management including forecasts.
- 4.1.4 Identify revenue and cost centers.
- 4.1.5 Explain economic factors that impact the hospitality industry.

Performance Standard 4.2: Sales

- 4.2.1 Implement sales process, solicitation, and creation of a request for proposal (RFP).
- 4.2.2 Differentiate different types of hospitality sales.
- 4.2.3 Compare and contrast pricing strategies and structures for comparable industries.
- 4.2.4 Analyze external economic benefit to the community.

CONTENT STANDARD 5.0: HOSPITALITY BUSINESS STRATEGIES

Performance Standard 5.1: Food and Beverage (F&B)

- 5.1.1 Examine food and beverage operations in various contexts.
- 5.1.2 Compare and contrast the classification of food services operations.

- 5.1.3 Explain the importance of proper sanitation in food and beverage operations.
- 5.1.4 Examine the equipment and supplies used in food and beverage operations.
- 5.1.5 Explain front- and back-of-the-house operations and positions.

Performance Standard 5.2: Amenity Management

- 5.2.1 Compare and contrast different kinds of events (e.g., meetings, conventions, weddings, expositions, farmers' markets, birthday parties, and so forth).
- 5.2.2 Define trends within outdoor recreation management.
- 5.2.3 Create and develop an amenities list to offer guests.
- 5.2.4 Identify amenities/services across multiple property outlets.
- 5.2.5 Define and describe hospitality amenity trends.

Performance Standard 5.3: Lodging Management

- 5.3.1 Discuss the nature of concierge services.
- 5.3.2 Determine complementary services and programs to provide guests.
- 5.3.3 Describe the purpose of guest relations.
- 5.3.4 Explain the role of guest services.

Performance Standard 5.4: Hospitality Marketing

- 5.4.1 Evaluate the impact of brand management strategies.
- 5.4.2 Create and develop a social media platform and campaign.
- 5.4.3 Identify factors that influence guest experiences throughout the guest life cycle.
- 5.4.4 Develop a marketing plan for a sector of the hospitality industry.

CONTENT STANDARD 6.0: PROFESSIONAL DEVELOPMENT

Performance Standard 6.1: Career Advancement and Networking

- 6.1.1 Participate in career advancement activities and career planning to enhance professional development within the hospitality industry.
- 6.1.2 Review and understand industry specific associations and certifications related to the hospitality industry.

CONTENT STANDARD 1.0: ~~PC HARDWARE~~MOBILE DEVICES**Performance Standard 1.1: ~~Students Will Be Able To Identify, Install, and Configure PC Hardware~~General Overview**

- 1.1.1 ~~Identify and understand motherboards and related components.~~ Explain and demonstrate safety procedures.
- 1.1.2 ~~Identify and understand RAM types and features.~~ Understand and explain proper disposal of mobile devices.
- ~~1.1.3 Identify and understand expansion card uses and differences.~~
- 1.1.4 ~~Understand differences~~ Compare and use contrast characteristics of storage various types of other mobile devices and media types features.
- 1.1.5 ~~Identify~~ Understand and understand CPU types and explain how to use appropriate mobile device features.
- 1.1.6 ~~Learn about Power Supply Units.~~ Configure basic mobile device network connectivity and application support.
- 1.1.7 ~~6~~ Demonstrate custom configurations per customer needs.

Performance Standard 1.2: Mobile Device Security

- 1.2.1 Configure secure wireless connection.
- 1.2.2 Understand and explain the application and usage of common security protection methods.
- 1.2.3 Understand and explain the differences in common security threats.
- 1.2.4 Demonstrate the implementation of best practices and methods for securing mobile devices.
- 1.2.5 Understand and explain appropriate data destruction and disposal methods.
- 1.2.6 Understand and demonstrate how to connect a mobile device to a secure wired and wireless network.

Performance Standard 1.3: Mobile Device Hardware

- 1.3.1 Compare and contrast components within mobile devices.
- 1.3.2 Understand and demonstrate how to configure accessories and ports.
- 1.3.3 Troubleshoot common mobile device hardware issues.

Performance Standard 1.4: Mobile Device Software

- 1.4.1 Understand the basic network connectivity and configuring email.
- 1.4.2 Understand the configuration of mobile device synchronization.
- 1.4.3 Compare and contrast mobile operating systems.
- 1.4.4 Troubleshoot mobile operating system (OS) and application issues.

CONTENT STANDARD 2.0: NETWORKING TECHNOLOGIES**Performance Standard 2.1: ~~Students Will Be Able To Identify and Explain~~General Networking Technologies**

- 2.1.1 Identify network cables and connectors and their characteristics.
- ~~2.1.2 Explain TCP/IP characteristics and properties.~~
- 2.1.3 ~~2~~ Identify and understand the use of common TCP / UDP ports, protocols, and their characteristics.
- 2.1.4 ~~3~~ Understand Given a scenario, install and configure a basic wired/wireless networking standards and encryption types network.

- ~~2.1.54~~ ~~Demonstrate installation, configuration, Compare and deployment of a Home office~~ contrast network protocols.
- ~~2.1.65~~ ~~Understand Compare and explain different Internet connection types~~ contrast wireless security protocols and features authentication methods.
- ~~2.1.76~~ ~~Understand different and explain the importance of physical security of network devices, their functions, and features.~~
- 2.1.7 Compare and contrast common networking hardware devices.
- ~~2.1.8~~ ~~Identify and understand the use of connector types and associated cables.~~ Summarize properties and services provided by networked hosts.
- ~~2.1.9~~ ~~Demonstrate the Use appropriate use of networking hardware and software network tools.~~
- 2.1.10 Compare and contrast internet connection types, network types and their features.
- 2.1.11 Explain common network configuration concepts.
- 2.1.12 Understand and explain remote access technology.

CONTENT STANDARD 3.0: ~~LAPTOPS~~ HARDWARE

Performance Standard 3.1: ~~Students Will Be Able To Identify, Install, and Configure Laptop and Related~~ General Hardware

- 3.1.1 Explain basic cable types, features, and their purposes, common connector types.
- ~~3.1.12~~ ~~Demonstrate~~ Understand and explain how to select and configure appropriate components for a custom configurations per PC configuration to meet customer specifications or needs.
- ~~3.1.23~~ ~~Install~~ Identify and configure laptop hardware understand RAM types and components features.
- 3.1.4 Identify and understand expansion card uses and differences.
- 3.1.5 Understand and explain differences and use of storage devices and media types.
- 3.1.6 Identify and understand CPU types and features.
- 3.1.7 Summarize power supply types and features.
- 3.1.8 Understand and explain various peripheral types.

Performance Standard 3.2: Printers

- 3.2.1 Install and maintain various print technologies.
- 3.2.2 Understand and explain how to configure multifunction devices.

CONTENT STANDARD 4.0: VIRTUALIZATION AND CLOUD COMPUTING

Performance Standard 4.1: General Concepts

- ~~34.1.31~~ ~~Compare and contrast the components within the display of a laptop~~ cloud computing concepts.
- 4.1.2 Understand and explain how to set up and configure client-side virtualization.
- ~~34.1.43~~ ~~Compare and contrast laptop features~~ different cloud computing platforms.

CONTENT STANDARD ~~45.0~~ 5.0: PRINTERS TROUBLESHOOTING

Performance Standard ~~45.1~~ 5.1: Students Will Be Able To Explain The Differences Between The Various Printer Types and Understand The Associated Imaging Process Hardware

- 5.1.1 Explain and demonstrate safety procedures.

- 5.1.2 Explain and demonstrate best practice methodology to resolve problems.
Demonstrate the installation and configuration of various printers and associated hardware.
- 45.1.4.3 Troubleshoot common hardware problems with the appropriate tools.
- 5.1.4 Troubleshoot storage devices and RAID with appropriate tools.
- 5.1.5 Troubleshoot video and displays.
- 5.1.6 Troubleshoot common mobile device issues with appropriate tools.
- 45.1.2.7 Given a scenario, install and configure Troubleshoot printers with appropriate tools.
- 5.1.8 Troubleshoot common security issues with appropriate tools and best practices.

Performance Standard 5.2: Software

- 5.2.1 Troubleshoot operating systems with appropriate tools.
- 5.2.2 Troubleshoot Microsoft Windows operating system problems.
- 5.2.3 Troubleshoot and resolve device security issues.
- 5.2.4.1.3 Demonstrate Understand and explain perform printer maintenance best practice procedures for malware and virus removal.

Performance Standard 5.3: Networks

- 5.3.1 Troubleshoot wired and wireless networks with appropriate tools.

CONTENT STANDARD 6.0: OPERATING SYSTEMS (OS)

Performance Standard 6.1: Windows Operating System

- 6.1.1 Understand and explain the features and requirements of Windows operating systems.

CONTENT STANDARD 5.0: WORKPLACE READINESS**Performance Standard 5.1: Students Will Learn and Demonstrate Workplace Readiness Skills**

- 5.1.1 Understand and demonstrate appropriate safety procedures.
- 5.1.2 Understand and explain the impact of environmental controls.
- 5.1.3 Understand and demonstrate proper communication and professionalism.
- 5.1.4 Understand the fundamentals of dealing with prohibited content/activity.

CONTENT STANDARD 6.0: OPERATING SYSTEMS**Performance Standard 6.1: Students Will Develop an Understanding of Microsoft Windows Operating Systems**

- 6.1.1 Understand the features and requirements of various Microsoft operating systems.
- 6.1.2 Demonstrate how to install, upgrade, and configure the operating system.
- 6.1.3 Understand and demonstrate the use of command line tools.
- 6.1.4 Understand and demonstrate Control Panel utilities and other operating system tools.
- 6.1.5 Understand Windows networking and configuration.
- 6.1.6 Understand and explain the differences in basic OS operating system security settings.
- 6.1.7 Understand Identify the basics of client-side virtualization scripting.

CONTENT STANDARD 7.0: SECURITY**Performance Standard 7.1: Students Will Understand and Demonstrate How To Secure A Network and A Workstation**
6.2: Other Operating Systems

- 7.1.1 Understand the application and usage of common prevention methods.
- 7.1.2 Understand the differences in common security threats.
- 7.1.3 Demonstrate the implementation of best practices to secure a workstation.
- 7.1.4 Understand appropriate data destruction and disposal methods.
- 7.2.1.5 Understand and demonstrate how to secure a Home office wired and wireless network. Explain and use basic features and tools of other operating systems (Linux, Mac operating system, etc.).

CONTENT STANDARD 8.0: MOBILE DEVICES
PROFESSIONALISM**Performance Standard 8.1: Students Will Develop an Understanding of Mobile Devices**
Workplace Readiness

- Understand the basic features of mobile operating systems and demonstrate
- 8.1.1 appropriate safety procedures.
- Understand and explain the basic network connectivity and configuring email impact of
- 8.1.2 environmental controls.
- 8.1.3 Demonstrate the implementation of best practices to secure a workstation.
- 8.1.4 Understand how to secure mobile devices.
- Understand and recognize differences in tablets demonstrate proper communication
- 8.1.5 and laptops professionalism.
- Understand the configuration fundamentals of mobile device synchronization dealing
- 8.1.6 with prohibited content/activity.

CONTENT STANDARD 9.0: TROUBLESHOOTING TECHNIQUES**Performance Standard 9.1: Students Will Demonstrate Proper OS and Workstation**

Troubleshooting Techniques 7.2: Operational Procedures

- ~~9.1.7.2.1~~ Troubleshoot common problems with PC Hardware with the appropriate tools. Compare and contrast best practices associated with types of documentation.
- ~~9.1.7.2.2~~ Troubleshoot hard drives and RAID with appropriate tools. Implement basic change management best practices.
- ~~9.1.7.2.3~~ Implement basic disaster prevention and recovery methods. ~~Troubleshoot video and displays.~~
- ~~9.1.7.2.4~~ Explain the processes for addressing prohibited content/activity, and privacy, licensing, and policy concepts. ~~Troubleshoot wired and wireless networks with appropriate tools.~~
- ~~9.1.7.2.5~~ Understand and explain the importance of keeping systems current with appropriate tools updates and patches.
- ~~9.1.6~~ Troubleshoot common laptop issues with appropriate tools.
- ~~9.1.7~~ Troubleshoot printers with appropriate tools.
- ~~9.1.8~~ Troubleshoot common security issues with appropriate tools and best practices.

CONTENT STANDARD 108.0: INDUSTRY TRENDS**Performance Standard 108.1: ~~Students Will~~ Understand Current and Emerging Computer Based Technologies**

- ~~108.1.1~~ Demonstrate an understanding of the constant change of emerging technologies.

CONTENT STANDARD 1.0: ETHICAL, LEGAL, AND PROFESSIONAL RESPONSIBILITIES

Performance Standard 1.1: Professionalism

- 1.1.1 Discuss different aspects of positive character.
- 1.1.2 Observe realistic workplace experience through industry-related activities.
- 1.1.3 Demonstrate professional dress and appearance in the workplace.
- 1.1.4 Describe the basic traits that make up professionalism.
- 1.1.5 Demonstrate appropriate written and oral communication skills in the workplace.
- 1.1.6 Define continuous process improvement as it relates to the individual patient, health care provider, team, and profession.

Performance Standard 1.2: Ethical Behavior in Healthcare

- 1.2.1 Practice responsibility within the ethical framework of the health professionals.
- 1.2.2 Identify the code of ethics for rehabilitation professionals.
- 1.2.3 Differentiate between ethical and legal issues impacting rehabilitation professions.
- 1.2.4 Compare personal and professional ethics.
- 1.2.5 Recognize ethical, cultural, and social issues and their implications related to rehabilitation professions.

Performance Standard 1.3: Legal Responsibilities in Healthcare

- 1.3.1 Identify the Health Insurance Portability and Accountability Act (HIPAA).
- 1.3.2 Identify the Family Education Rights and Privacy Act (FERPA).
- 1.3.3 Compare and contrast FERPA and HIPAA.
- 1.3.4 Comprehend legal terminology associated with the medical profession.
- 1.3.5 Apply the concept of confidentiality to patient information and records.
- 1.3.6 Discuss common methods of payment for healthcare.
- 1.3.7 Explain patients' bill of rights and advance directives.
- 1.3.8 Differentiate between the scopes of practice of rehabilitation professionals.
- 1.3.9 Define Health Informatics.
- 1.3.10 Define evidence-based practice.

CONTENT STANDARD 2.0: GENERAL HEALTH AND WELLNESS

Performance Standard 2.1: Understand Concepts of Wellness

- 2.1.1 Demonstrate the ability to apply principles of physical fitness, nutrition, and weight control.
- 2.1.2 Recognize signs and symptoms of alcohol and drug abuse.
- 2.1.3 Identify common disease and injury prevention strategies.
- 2.1.4 Identify physical, mental, emotional, and social wellness and stress management concepts.
- 2.1.5 Identify management strategies of environmental and consumer health.
- 2.1.6 Understand the significance of self-responsibility in negative/positive lifestyle habits.
- 2.1.7 Distinguish between the health belief model, social-cognitive model, and trans-theoretical model.

CONTENT STANDARD 3.0: ANATOMY AND PHYSIOLOGY

Performance Standard 3.1: Medical Terminology

- 3.1.1 Define common prefixes, suffixes, and word roots relating to body structures and functions.
- 3.1.2 Spell and pronounce medical terms correctly.
- 3.1.3 Identify basic medical abbreviations.
- 3.1.4 Use proper terminology while describing common injuries and pathologies.

Performance Standard 3.2: Body Systems Structures and Functions

- 3.2.1 Identify the role and structure of the cardiovascular system.
- 3.2.2 Identify the role and structure of the circulatory system.
- 3.2.3 Identify the role and structure of the respiratory system.
- 3.2.4 Identify the role and structure of the nervous system.
- 3.2.5 Identify the role and structure of the endocrine system.
- 3.2.6 Identify the role and structure of the reproductive system.
- 3.2.7 Identify the role and structure of the sensory system.
- 3.2.8 Identify the role and structure of the excretory/urinary system.
- 3.2.9 Identify the role and structure of the digestive system.
- 3.2.10 Identify the role and structure of the muscular system.
- 3.2.11 Identify the role and structure of the skeletal system.
- 3.2.12 Identify the role and structure of the integumentary system.

Performance Standard 3.3: Musculoskeletal System

- 3.3.1 Differentiate between the four basic tissue types in the body.
- 3.3.2 Explain the general mechanism and type of muscle contraction.
- 3.3.3 Categorize the structures of the body into the organizational system.
- 3.3.4 Summarize functions of the skeletal system.
- 3.3.5 Identify the bones of the axial and appendicular skeleton and their gross anatomical landmarks.
- 3.3.6 Identify standard anatomical position and directions.
- 3.3.7 Distinguish among three types of cartilage.
- 3.3.8 Differentiate among the various types of joints.
- 3.3.9 Compare the characteristics of muscles.

CONTENT STANDARD 4.0: ASPECTS OF THE INTERPROFESSIONAL TEAM

Performance Standard 4.1: Members of the Team

- 4.1.1 Explore various medical specialties.
- 4.1.2 Differentiate between the roles and responsibilities of the rehabilitation team.
- 4.1.3 Compare and identify professional associations.
- 4.1.4 Identify the importance and purpose of medical documentation.
- 4.1.5 Identify the components of medical documentation.

Performance Standard 4.2: Educational Requirements

- 4.2.1 Research educational requirements for rehabilitation services careers.
- 4.2.2 Explain certification or licensure requirements for rehabilitation services careers.
- 4.2.3 Compare and contrast between certification, registration, and licensure for rehabilitation services careers.

Performance Standard 4.3: Career Opportunities

- 4.3.1 Identify the employment opportunities for rehabilitation professions.
- 4.3.2 Identify the practice settings and specialties for rehabilitation professions.

CONTENT STANDARD 5.0: PATIENT CARE SKILLS

Performance Standard 5.1: Safety Practices

- 5.1.1 Explain blood borne pathogens.

- 5.1.2 Demonstrate universal precautions and the use of Personal Protective Equipment (PPE).
- 5.1.3 Describe effective practices to manage infectious disease transmission.
- 5.1.4 Recognize the importance of safety data sheets (SDS).
- 5.1.5 Identify and explain the components of an exposure control plan.
- 5.1.6 Identify and explain the components of an emergency action plan.
- 5.1.7 Demonstrate proper body mechanics and patient transfer techniques.

Performance Standard 5.2: Basic First Aid and CPR Training

- 5.2.1 Apply the concept of Universal Precautions to the practice of first aid and CPR.
- 5.2.2 Explain the importance of cardiopulmonary resuscitation (CPR) and how to manage an obstructed airway.
- 5.2.3 Demonstrate the proper technique for performing Basic Life Support for the Healthcare Provider CPR/AED and basic first aid on an adult, child, and infant.

Performance Standard 5.3: Vital Signs

- 5.3.1 Measure height and weight.
- 5.3.2 Measure heart rate, blood pressure, temperature, and skin color.
- 5.3.3 Measure respiratory rate.
- 5.3.4 Demonstrate an understanding of normal values for vital signs.

Performance Standard 5.4: Psychological Response

- 5.4.1 Compare the five psychological phases a patient may experience following a change in function or loss.
- 5.4.2 Examine different coping mechanisms to loss of function, death/dying, illness, and disability.
- 5.4.3 Demonstrate appropriate therapeutic communication including empathy and compassion.
- 5.4.4 Describe the importance of goal setting in the rehabilitation process.
- 5.4.5 Understand the theories of pain management.

CONTENT STANDARD 6.0: PRINCIPLES OF THERAPEUTIC INTERVENTIONS

Performance Standard 6.1: Therapeutic Exercise

- 6.1.1 Define functional mobility.
- 6.1.2 Discuss and identify the components and goals of a rehabilitation program.
- 6.1.3 Compare and contrast aerobic and anaerobic therapeutic exercise.
- 6.1.4 Describe various range of motion exercises including passive, assisted, active, and resistive.
- 6.1.5 Recognize various equipment and tools used in therapeutic exercise.
- 6.1.6 Examine the importance of various flexibility techniques.
- 6.1.7 Identify evidence-based practice.

Performance Standard 6.2: Standard Tests and Measures

- 6.2.1 Define standard muscle testing.
- 6.2.2 Identify standard range of motion testing including goniometry.
- 6.2.3 Identify common orthopedic special tests.

Performance Standard 6.3: Modalities and Equipment

- 6.3.1 Compare and contrast the principles of rest, ice, compression, and elevation (R.I.C.E.) and protection, rest, ice, compression and elevation (P.R.I.C.E.).
- 6.3.2 Demonstrate proper fitting and gait with assistive devices.
- 6.3.3 Demonstrate proper splinting and bracing applications.
- 6.3.4 Identify the purpose of therapeutic modalities.

6.3.5 Describe the physiological effects, indications, contraindications, and application of therapeutic modalities.

CONTENT STANDARD 7.0: COMMON PATHOLOGIES

Performance Standard 7.1: Common Injuries

- 7.1.1 Identify common musculoskeletal injuries.
- 7.1.2 Differentiate between symptoms of sprains and strains.
- 7.1.3 Categorize the most common types of skin injuries.
- 7.1.4 Differentiate between signs and symptoms of concussions.
- 7.1.5 Differentiate between the etiology of soft tissue and bone injuries.

Performance Standard 7.2: General Medical Conditions

- 7.2.1 Recognize the general impact of diabetes to patient care.
- 7.2.2 Recognize the need for consultation when caring for patients with common diseases and conditions including rheumatoid arthritis, osteoarthritis, obesity, and so forth.
- 7.2.3 Recognize the need for consultation when caring for patients with neurological conditions.

Performance Standard 7.3: Tissue Response to Injury

- 7.3.1 Describe the inflammatory process.
- 7.3.2 Examine the steps in the healing process of bone and soft tissue.
- 7.3.3 Compare and contrast acute and chronic response to injury.

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CONTENT STANDARD 1.0: INTRODUCTION TO ELECTRICAL WORK SAFETY

Performance Standard 1.1: General Safety

- 1.1.1 Explain what a material safety data sheet (MSDS/SDS) is and its requirements.
- 1.1.2 Explain safety procedures for trenches.
- 1.1.3 Explain safety for confined space.
- 1.1.4 Explain lockout and tagout.
- 1.1.5 Explain protective clothing to include eye and hearing protection.
- 1.1.6 Explain the use of a safety harness.
- 1.1.7 Explain safety for ladders and scaffolds.
- 1.1.8 State the purpose of arc-fault and ground-fault circuit interrupters.
- 1.1.9 Identify safety handling and use of hand and power tools.

CONTENT STANDARD 2.0: ELECTRICAL THEORY

Performance Standard 2.1: Electrical Qualities and Ohm's Law

- 2.1.1 Explain the structure of the atom.
- 2.1.2 Explain electron flow.
- 2.1.3 State the difference between insulators and conductors.
- 2.1.4 Explain the basic methods of producing electricity.
- 2.1.5 Describe electrical effects such as magnetism, light, and heat.
- 2.1.6 Define a coulomb.
- 2.1.7 Define an ampere.
- 2.1.8 Define an ohm.
- 2.1.9 Define a watt.
- 2.1.10 Determine the resistance of a resistor using the color code or an ohmmeter.
- 2.1.11 Determine whether a resistor is operating within its power rating.
- 2.1.12 Calculate different electrical values using Ohm's law.
- 2.1.13 Select the proper Ohm's law formula from a chart.

Performance Standard 2.2: Static Electricity and Magnetism

- 2.2.1 Discuss the nature of static electricity.
- 2.2.2 Discuss lightning protection.
- 2.2.3 Give examples of both nuisance and useful static charges.
- 2.2.4 Discuss the properties of permanent magnets.
- 2.2.5 Discuss the operation of electromagnets.
- 2.2.6 Determine the polarity of an electromagnet when the direction of the current is known.

CONTENT STANDARD 3.0: ELECTRICAL CIRCUITS

Performance Standard 3.1: Series

- 3.1.1 Discuss the properties of series circuits.
- 3.1.2 List three rules for solving electrical values of series circuits.
- 3.1.3 Calculate values of voltage, current, resistance, and power for series circuits.

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Performance Standard 3.2: Parallel

- 3.2.1 Discuss the characteristics of parallel circuits.
- 3.2.2 State three rules for solving electrical values of parallel circuits.
- 3.2.3 Solve the missing values in a parallel circuit using the three rules and Ohm's law.
- 3.2.4 Calculate current values using the current divider formula.

Performance Standard 3.3: Combination

- 3.3.1 Define a combination circuit.
- 3.3.2 List the rules for parallel circuits.
- 3.3.3 List the rules for series circuits.
- 3.3.4 Solve combination circuits using the rules for parallel circuits, rules for series circuits, and Ohm's law.

CONTENT STANDARD 4.0: TOOLS

Performance Standard 4.1: Electrical Testing Equipment

- 4.1.1 Identify the use of Category I through Category IV meters.
- 4.1.2 Use an ohmmeter and measure any resistance in electrical equipment or conductor.
- 4.1.3 Measure voltage between phases and phase to ground.
- 4.1.4 Take an ampere reading of any load.
- 4.1.5 Diagram the proper connection of a watt meter.
- 4.1.6 State the operation characteristics of analog and digital meters.
- 4.1.7 Recognize the wave form on an oscilloscope.

Performance Standard 4.2: Bending Conduit

- 4.2.1 Identify the parts of tools used for bending.
- 4.2.2 Identify the methods and tools used in bending raceways.
- 4.2.3 Define and identify saddle, offset, concentric, and 90-degree bends.

CONTENT STANDARD 5.0: INTRODUCTION TO THE NATIONAL ELECTRICAL CODE (NEC)

Performance Standard 5.1: NEC Articles 90, 100, and 110

- 5.1.1 Understand how the NEC began and its purpose.
- 5.1.2 Understand how changes to the code evolve.
- 5.1.3 Understand the terminology, and format of the NEC.
- 5.1.4 State the roles of nationally recognized testing laboratories, the National Electrical Manufacturers Association, and the National Fire Protection Association.
- 5.1.5 Accurately evaluate a location as accessible, readily accessible, or not readily accessible.
- 5.1.6 Identify equipment classified as appliances.
- 5.1.7 State the four categories of branch circuits.
- 5.1.8 State the difference between a continuous load and a non-continuous load.
- 5.1.9 Determine minimum vertical clearances for each installation using the NEC.
- 5.1.10 Apply dedicated space requirements to electrical equipment to include the area that is to be clear of foreign systems unless protection is provided.

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- 5.1.11 Determine the working clearances of any installation using the NEC.
- 5.1.12 State the difference between a branch circuit and a feeder.
- 5.1.13 State the difference between “grounded” and “grounding” as it applies to a conductor.
- 5.1.14 Define what “in sight” means in the NEC.
- 5.1.15 Give examples of damp, wet, and dry locations using the code book.
- 5.1.16 Determine which conductors are the neutral conductors.
- 5.1.17 Define a separately derived system using the NEC.

Performance Standard 5.2: Boxes and Enclosures--NEC Articles 312, 314, and other Appropriate NEC Sections

- 5.2.1 Determine the cubic inch capacity of boxes when installing conductors # 6 AWG and smaller.
- 5.2.2 State which items use volume allowances of conductor fill when calculating box fill.
- 5.2.3 State how identical switches or receptacles can be mounted side by side, in a two gang box, can have different cubic inch volume allowances.
- 5.2.4 Determine the box size when the number of conductors is known.
- 5.2.5 Know the minimum conductor length to be left inside a box.
- 5.2.6 Explain what must be accessible after installation.
- 5.2.7 State the mounting and supporting provisions for boxes and conduit bodies using the NEC.
- 5.2.8 Determine the type of box needed for various applications using the NEC.
- 5.2.9 Calculate for junction box sizing containing #4 AWG and larger conductors using the NEC

Performance Standard 5.3: Cables--NEC Articles 320 through 340, and other appropriate NEC sections

- 5.3.1 State the distance from the edge of the wood framing member a cable can be installed unless a steel plate is installed.
- 5.3.2 State the requirements for protection of cable in metal framing using the NEC.
- 5.3.3 State the sealing requirements in fire-resistant-rated construction when electrical penetrations are made.
- 5.3.4 Identify what cables are permitted in spaces used for environmental air.
- 5.3.5 Determine the support requirements for MC, AC, and nonmetallic-sheathed cable using the NEC.
- 5.3.6 Identify the conductors in a cable and use the NEC to state how certain conductors can be re-identified.
- 5.3.7 Determine underground installation provisions per the NEC.
- 5.3.8 Identify special application cables using the NEC (This is not to be for installation requirements as this is for first year students).

Performance Standard 5.4: Raceways and Conductors--NEC Sections 11.14, 240.4, 300.19; NEC Articles 310, 342 through 378; Chapter 9 Tables; Annex C, and other appropriate NEC Sections

- 5.4.1 Determine the general provisions for any raceway installation using the NEC.

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- 5.4.2 Determine the type of raceways suited for individual installations.
- 5.4.3 Determine the support requirements for various raceways using the NEC.
- 5.4.4 Determine the provisions for nonmetallic and metallic flexible conduit using the NEC.
- 5.4.5 Calculate the electrical trade size conduit required for any circuit or feeder.
- 5.4.6 Determine basic conductor properties using the NEC.
- 5.4.7 Show conductor temperature limitations.
- 5.4.8 Determine the provisions for conductors connected in parallel.
- 5.4.9 Apply conductor ampacity correction factors to include continuous loads.

**Performance Standard 5.5: General Provisions for One-Family Dwellings--NEC
Articles 210, 220, 240, 250, 315, 402, 404, 406, 410, 422, and other appropriate NEC
Sections**

- 5.5.1 Calculate the minimum number of 15 and 20 amp branch circuits in a one-family dwelling.
- 5.5.2 Determine the requirements for single receptacles on individual branch circuits.
- 5.5.3 Determine the branch-circuit ratings allowed for general-purpose receptacles.
- 5.5.4 Demonstrate the layout of general-purpose receptacles in a dwelling.
- 5.5.5 Determine the receptacle rating allowed on various size branch circuits using the NEC.
- 5.5.6 Determine the requirements for receptacles around sink areas using the NEC.
- 5.5.7 Determine the requirements for lighting and switching using the NEC.
- 5.5.8 Determine how and when to use the white conductor as an ungrounded conductor.
- 5.5.9 Determine any general requirement for boxes using the NEC.
- 5.5.10 Determine any illumination requirement for entrances and exits.
- 5.5.11 Determine the allowable use of vegetation such as trees for the mounting of outlets.

**Performance Standard 5.6: Specific Provisions for One-Family Dwellings--NEC
Articles 210, 410, 422, and other appropriate NEC sections**

- 5.6.1 Determine the required ampere rating for any receptacle or branch circuit in kitchens, pantries, dining rooms, breakfast rooms, and similar locations.
- 5.6.2 Determine the requirements for countertop receptacle placement using the NEC.
- 5.6.3 State the minimum number of small appliance branch circuits required and their application.
- 5.6.4 Determine the requirements for appliances both cord and plug and permanently connected.
- 5.6.5 Calculate the load requirements for appliance branch circuits.
- 5.6.6 State the specific provisions for GFCI placement.
- 5.6.7 Identify luminaries permitted in closets and its placement.
- 5.6.8 Define a bathroom by the NEC and discuss the circuit requirements for receptacles, lights and fans.
- 5.6.9 Determine the requirements for receptacles and lighting in attached garages, detached garages, and basements.
- 5.6.10 Determine the requirements for laundry rooms to include the clothes dryer.

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- 5.6.11 Determine the lighting and receptacle requirements for attic, crawl space, and HVAC equipment.

Performance Standard 5.7: Load Calculations for One-Family Dwellings--NEC Articles, 210, 220, 230, 250, 310, and other appropriate NEC sections

- 5.7.1 Calculate the general lighting for a one-family dwelling.
- 5.7.2 Specify the volt-amp requirements for small appliance and laundry branch circuits.
- 5.7.3 Apply demand factors to the general lighting load.
- 5.7.4 Apply demand factors to fastened-in-place appliances.
- 5.7.5 Calculate feeder demand loads for household clothes dryers.
- 5.7.6 Calculate feeder demand loads for household cooking equipment.
- 5.7.7 Calculate feeder demand loads for HVAC equipment.
- 5.7.8 Calculate a one-family dwelling or feeder using the standard method.
- 5.7.9 Calculate a one-family dwelling or feeder using the optional method.
- 5.7.10 Calculate service and feeder conductors.
- 5.7.11 Calculate the minimum size neutral conductor.
- 5.7.12 Select the proper grounding electrode conductor.

Performance Standard 5.8: Services and Electrical Equipment for One-Family Dwellings--NEC Articles 110, 225, 230, 240, 250, 300, 310, and other appropriate NEC sections

- 5.8.1 Determine adequate strength for a mast supporting service-drop conductors.
- 5.8.2 Explain the use of service-entrance cable.
- 5.8.3 Define a service lateral and underground service conductors, and explain their provisions.
- 5.8.4 Determine clearances for service and outside overhead wiring.
- 5.8.5 Determine work space required for electrical equipment, services, and panels.
- 5.8.6 Define a panelboard, an enclosure, and a cutout box.
- 5.8.7 Determine the proper application and use of circuit breakers and fuses using the NEC.
- 5.8.8 Determine the appropriate conductor sizing using 310.15(B)(7) or Table 310.15 (B)(16).
- 5.8.9 Size the grounding electrode conductor, equipment grounding conductor, main bonding jumper, bonding jumpers on the supply side or load side of the main breaker or fuse on any one-family dwelling service.
- 5.8.10 Properly install grounded and grounding conductors in subpanels.
- 5.8.11 Prevent objectionable current flow in grounding conductors and equipment.
- 5.8.12 Properly install a panelboard in a separate building or structure.

Performance Standard 5.9: Comprehensive Provisions for Multi-Family Dwellings--NEC Articles 210, 230, 240, 250, 310, Chapter 9, Tables 8 and 9, and other appropriate NEC sections

- 5.9.1 Determine when more than one service can be installed on a multifamily building.
- 5.9.2 Determine the proper number of disconnects allowed on a service.
- 5.9.3 Determine proper access to a unit's disconnecting means by any occupant.

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- 5.9.4 Properly install the grounding electrode conductors to the grounding electrode.
- 5.9.5 Determine the appropriate service or feeder conductor sizing using 310.15(B)(7) or Table 310.15 (B)(16) Determine outdoor receptacle placement.
- 5.9.6 Calculate voltage-drop.

Performance Standard 5.10: General Provisions for Commercial Locations--NEC Articles 210, 220, 310, 410, 430, 440, 600, and other appropriate NEC sections

- 5.10.1 Compare receptacle placement with that of one-family dwellings to show the difference.
- 5.10.2 Determine the receptacle requirements in a commercial bathroom.
- 5.10.3 Determine the sign outlet requirements in a commercial installation.
- 5.10.4 Determine the branch circuit requirements for motors and HVAC equipment.
- 5.10.5 Determine the volt-amp ratings for receptacles (single, duplex, quad, etc.).
- 5.10.6 Determine the maximum number of receptacles permitted on a 15 amp or 20 amp circuit.
- 5.10.7 Identify the NEC accessibility requirements for receptacles in guest rooms of hotels and motels.
- 5.10.8 Determine NEC requirements for showcase and show window.
- 5.10.9 Calculate general lighting load based on square-foot area.
- 5.10.10 Determine the provisions for fluorescent, HID, recessed, LED, and track lighting provisions.
- 5.10.11 Determine the proper use and restrictions when using luminaires as raceways.
- 5.10.12 Determine handhole access requirements.

Performance Standard 5.11: Provisions for Services, Feeders, and Provisions for Commercial Locations--NEC Articles 110, 215, 230, 250, 368, 408, and other appropriate NEC sections

- 5.11.1 Properly install both grounding and grounded conductors on the line side and load side of the service supply conductors.
- 5.11.2 Determine the conditions that require ground-fault protection of equipment.
- 5.11.3 Recognize separately derived systems.
- 5.11.4 Explain how to properly ground and bond separately derived systems.
- 5.11.5 Recognize and explain the use of busways.

CONTENT STANDARD 6.0: SPECIAL OCCUPANCIES

Performance Standard 6.1: Hazardous Locations--NEC Articles 500 through 516

- 6.1.1 Explain what a hazardous location is.
- 6.1.2 Determine if a classified location is Class I, II or III and if it is Division 1 or 2 using the NEC.
- 6.1.3 Identify the NEC requirements pertaining to commercial garages and repair and storage facilities.
- 6.1.4 Identify the NEC requirements for buildings in which aircraft are stored and repaired.
- 6.1.5 Identify the NEC requirements for a motor fuel dispensing facility.

Performance Standard 6.2: Health Care--NEC Articles 500 through 517

- 6.2.1 Identify basic health care terminology used in NEC.
- 6.2.2 Determine the grounding and bonding requirements of any health care facility.

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- 6.2.3 Identify patient care areas as general care or critical care and their branch circuit requirements.
- 6.2.4 Determine the tamper-resistant requirements of pediatric facilities.
- 6.2.5 Define the types of essential systems.

Performance Standard 6.3: Other Special Occupancies--NEC Articles 518 through 551

- 6.3.1 Define “places of assembly” according to the NEC.
- 6.3.2 Determine manufactured building requirements.
- 6.3.3 Determine agricultural building requirements.
- 6.3.4 Determine requirements for mobile home parks and recreational vehicle parks.

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CONTENT STANDARD 1.0: ELECTRICAL MATHEMATICS

Performance Standard 1.1: Basic Trigonometry

- 1.1.1 Define a right triangle.
- 1.1.2 Use the Pythagorean theorem to solve problems concerning right triangles.
- 1.1.3 Solve problems using sines, cosines, and tangents.

CONTENT STANDARD 2.0: ALTERNATING CURRENT

Performance Standard 2.1: Circuits

- 2.1.1 Discuss the difference between AC and DC.
- 2.1.2 Compute instantaneous values of voltage and current for a sine wave.
- 2.1.3 Compute peak, RMS, and average values of voltage and current.
- 2.1.4 Define the phase relationship of voltage and current in a pure resistive circuit.
- 2.1.5 Identify half-wave and full-wave rectifiers.

Performance Standard 2.2: Inductance in AC Circuits

- 2.2.1 Define the properties of inductance in an AC circuit.
- 2.2.2 Define inductive reactance.
- 2.2.3 Calculate the values of inductive reactance and inductance.
- 2.2.4 Define the relationship of voltage and current in a pure inductive circuit.
- 2.2.5 Calculate values for inductors connected in series and parallel.
- 2.2.6 Define reactive power.
- 2.2.7 Define the Q of a coil.

Performance Standard 2.3: Resistive-Inductive Series Circuits

- 2.3.1 Define the relationship of resistance and inductance in an AC circuit.
- 2.3.2 Define power factor.
- 2.3.3 Calculate the values of voltage, current, apparent power, true power, reactive power, impedance, resistance, inductive reactance, and power factor in an RL series circuit.
- 2.3.4 Calculate the phase angle for current and voltage in an RL circuit.

Performance Standard 2.4: Resistive-Inductive Parallel Circuits

- 2.4.1 Define the operation of a parallel circuit containing resistance and inductance.
- 2.4.2 Calculate the values of voltage, current, apparent power, true power, reactive power, impedance, resistance, inductive reactance, and power factor in an RL parallel circuit.
- 2.4.3 Calculate the phase angle for current and voltage in an RL parallel circuit.

Performance Standard 2.5: Capacitors

- 2.5.1 List three factors that determine the capacitance of a capacitor.
- 2.5.2 Discuss the electrostatic charge.
- 2.5.3 State the difference between polarized and non-polarized capacitors.
- 2.5.4 Calculate the values for series and parallel connections of capacitors.

Performance Standard 2.6: Capacitance in AC Circuits

- 2.6.1 Understand how capacitors function in an AC circuit.

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- 2.6.2 Define capacitive reactance.
- 2.6.3 Calculate the value of capacitive reactance in an AC circuit.
- 2.6.4 Calculate the value of capacitance in an AC circuit.
- 2.6.5 Identify the relationship of voltage and resistance in an AC circuit.
- 2.6.6 Calculate the phase angle for current and voltage in an AC circuit.

Performance Standard 2.7: Resistive-Capacitive Series Circuits

- 2.7.1 Identify the relationship of resistance and capacitance in an AC series circuit.
- 2.7.2 Calculate the values of voltage, current, apparent power, true power, reactive power, impedance, resistance, inductive reactance, and power factor in an RC series circuit.
- 2.7.3 Calculate the phase angle for current and voltage in an RC series circuit.

Performance Standard 2.8: Resistive-Capacitive Parallel Circuits

- 2.8.1 Define the operation of a parallel circuit containing resistance and capacitance.
- 2.8.2 Calculate the values of voltage, current, apparent power, true power, reactive power, impedance, resistance, inductive reactance, power factor, and phase angle in an RC parallel circuit.

Performance Standard 2.9: Resistive-Inductive-Capacitive Parallel Circuits

- 2.9.1 Identify the characteristics of AC circuits that contain resistance, inductance, and capacitance connected in parallel.
- 2.9.2 Calculate the values of voltage, current, apparent power, true power, reactive power, impedance, resistance, inductive reactance, power factor, and phase angle in an RLC parallel circuit.

Performance Standard 2.10: Three-Phase Circuits

- 2.10.1 Identify the difference between single-phase and three-phase voltages.
- 2.10.2 Identify a three-phase delta or wye connection.
- 2.10.3 Calculate the voltage and current values for wye and delta circuits.

Performance Standard 2.11: Single-Phase Transformers

- 2.11.1 Understand the different types of transformers and how they work.
- 2.11.2 Calculate the values of voltage, current, and turns for a single-phase transformer.
- 2.11.3 Understand the polarity markings.

Performance Standard 2.12: Three-Phase Transformers

- 2.12.1 Identify the proper connections for three single-phase transformers to form a three-phase bank.
- 2.12.2 Calculate voltage and current for three-phase transformer connections.
- 2.12.3 Identify the proper connections for two single phase transformers to form a three-phase open-delta connection.
- 2.12.4 Calculate the values of voltage and current for a three-phase transformer used to supply both three-phase and single-phase loads.
- 2.12.5 Define harmonics.
- 2.12.6 Understand harmonic problems and their solution.

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CONTENT STANDARD 3.0: MOTORS

Performance Standard 3.1: Three-Phase Motors

- 3.1.1 Understand the basic operating principals of a three-phase motor.
- 3.1.2 Define a rotating magnetic field.
- 3.1.3 Define the operating principals of a squirrel-cage motor.
- 3.1.4 Identify the correct connections for dual voltage motors.
- 3.1.5 Define the procedure for reversing a three-phase motor.

Performance Standard 3.2: Single-Phase Motors

- 3.2.1 Define the operation of various motor types.
- 3.2.2 Define the basic operation of a split-phase motor.
- 3.2.3 Understand the purpose of a start winding and how it works.
- 3.2.4 Understand the purpose of a centrifugal switch.
- 3.2.5 Recognize the types of starting relays.

Performance Standard 3.3: Motor Load Calculations as per NEC

- 3.3.1 Determine the full load current of any motor according to the NEC.
- 3.3.2 Understand the information given on a motor nameplate and its application.
- 3.3.3 Calculate the branch circuit wire size for any motor.
- 3.3.4 Determine the appropriate circuit protection for any motor.
- 3.3.5 Calculate overloads.
- 3.3.6 Understand the difference between overload protection and short-circuit/ground-fault protection.
- 3.3.7 Calculate a feeder for any set of motors.
- 3.3.8 Calculate the feeder overcurrent device.

CONTENT STANDARD 4.0: NEC COMPLIANCE

Performance Standard 4.1: Box Fill and Junction Box Sizing

- 4.1.1 Calculate box fill for any size wire and combination of devices.
- 4.1.2 Calculate pull and junction boxes.

Performance Standard 4.2: Conductor Ampacity Correction Factors

- 4.2.1 Calculate correction factors for temperature.
- 4.2.2 Calculate correction factors for raceway fill.
- 4.2.3 Calculate correction factors for continuous loads.
- 4.2.4 Calculate correction factors for any combination of the above.
- 4.2.5 Use Table 310.15(B)(16) and similar tables.
- 4.2.6 Apply NEC Chapter 9 notes for derate in nipples.

Performance Standard 4.3: Raceway Fill

- 4.3.1 Use NEC tables to calculate raceway fill using any combination of wire and cable sizes.
- 4.3.2 Use Annex C tables.
- 4.3.3 Calculate conduit nipple fill.

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Performance Standard 4.4: Grounding and Bonding

- 4.4.1 Define objectionable current.
- 4.4.2 Identify a main bonding jumper.
- 4.4.3 Calculate the grounding electrode conductor.
- 4.4.4 Identify proper installations of grounding electrode systems.
- 4.4.5 Understand the purpose of bonding.
- 4.4.6 Calculate equipment grounding conductors.
- 4.4.7 Use Article 250 to properly ground and bond any system.
- 4.4.8 Use the NEC to answer any grounding question.

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CONTENT STANDARD 1.0: GENERAL ELECTRICAL SAFETY

Performance Standard 1.1: Safety and NFPA 70E

- 1.1.1 Achieve an electrically safe work condition.
- 1.1.2 Interpret arc flash labeling.
- 1.1.3 Choose appropriate levels of PPE for the hazard.
- 1.1.4 Describe the steps to verify your testing equipment.
- 1.1.5 Explain lockout and tagout procedures.
- 1.1.6 Identify the use of Category I through Category IV meters.
- 1.1.7 Identify proper meter maintenance.
- 1.1.8 Explain the use of a safety harness.
- 1.1.9 Explain safety for ladders and scaffolds.
- 1.1.10 Explain what a material safety data sheet (MSDS/SDS) is and its requirements.
- 1.1.11 Explain safety procedures for trenches.
- 1.1.12 Explain safety for confined space.
- 1.1.13 Explain protective clothing to include eye and hearing protection.
- 1.1.14 State the purpose of arc-fault and ground-fault circuit interrupters.
- 1.1.15 Identify safety handling and use of hand and power tools.

CONTENT STANDARD 2.0: BLUEPRINTS

Performance Standard 2.1: Print Reading Fundamentals

- 2.1.1 Recognize site plan, floor plans, elevations, sectional views, wiring diagrams, details, and schedules.
- 2.1.2 Recognize types of electrical schedules to include fixtures, feeders, main switchboard, branch circuit panels, and transformers.
- 2.1.3 Demonstrate the application of building plans and specifications.
- 2.1.4 Locate specific information on building plans.
- 2.1.5 Research additional information from industry-related resources.

Performance Standard 2.2: Residential and Commercial Electrical Symbols

- 2.2.1 Read and interpret electrical symbols used in construction drawings.
- 2.2.2 Identify the electrical installation requirements for a building from symbols.
- 2.2.3 Determine aboveground and underground electrical distribution.
- 2.2.4 Determine electrical materials, measurements, and specifications.

Performance Standard 2.3: Electrical Drawings and Plans

- 2.3.1 Differentiate between the purposes and characteristics of drawings, plans and diagrams.
- 2.3.2 Describe the purpose of and list the primary features included on each type of drawing and plan to include floor plans, pictorial drawings, orthographic elevations, orthographic views, application drawings, location drawings, detail drawings, assembly drawings, site plans, foundation plans, structural plans, and utility plans.
- 2.3.3 Identify the proper drawing or plan for the application.

Performance Standard 2.4: Construction and Maintenance

- 2.4.1 Describe the different responsibilities of various construction personnel.

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- 2.4.2 Identify the major steps on the construction process.
- 2.4.3 Describe the different responsibilities of various maintenance personnel.
- 2.4.4 Compare preventive and predictive maintenance.

Performance Standard 2.5: Residential and Commercial Power and Lighting Systems

- 2.5.1 Compare how power and lighting information is included on residential and commercial plans.
- 2.5.2 Describe the types of electrical equipment included on single-line diagrams.
- 2.5.3 Describe the typical information included on light fixture schedules and how this information is linked to floor plans.
- 2.5.4 Describe the common types of electrical detail drawings.

CONTENT STANDARD 3.0: LOAD CALCULATIONS

Performance Standard 3.1: Single Family Dwelling Unit Calculations

- 3.1.1 Properly define a one-family dwelling.
- 3.1.2 Calculate the general lighting, general use receptacle, small appliance, and laundry demand load for a dwelling.
- 3.1.3 Calculate the appliance demand load for a dwelling.
- 3.1.4 Determine the dryer demand load for a dwelling.
- 3.1.5 Determine the cooking appliance demand load for a dwelling.
- 3.1.6 Determine the heating and air conditioning demand load for a dwelling.
- 3.1.7 Properly size the service equipment and service conductors for a dwelling using the standard calculation as per Article 220.
- 3.1.8 Properly size feeder conductors (main to sub-panel) for a dwelling.
- 3.1.9 Use the optional calculation for a dwelling as per Article 220.
- 3.1.10 Calculate and size the service neutral conductor in a dwelling (neutral load).

Performance Standard 3.2: Multifamily Dwelling Calculations

- 3.2.1 Properly define a multifamily dwelling.
- 3.2.2 Calculate the general lighting, general use receptacle, small appliance, and laundry demand load for a multifamily dwelling.
- 3.2.3 Calculate the appliance demand load for a multifamily dwelling.
- 3.2.4 Determine the dryer demand load for a multifamily dwelling.
- 3.2.5 Determine the cooking appliance demand load for a multifamily dwelling.
- 3.2.6 Determine the heating and air conditioning demand load for a multifamily dwelling.
- 3.2.7 Properly size the service equipment and service conductors for a multifamily dwelling using the standard calculation as per Article 220.
- 3.2.8 Properly size feeder conductors (main to sub-panel) for a multifamily dwelling.
- 3.2.9 Use the optional calculation for a multifamily dwelling as per Article 220.
- 3.2.10 Calculate and size the service neutral conductor in a multifamily dwelling (neutral load).

Performance Standard 3.3: Commercial Calculations

- 3.3.1 Determine the lighting demand factor for any commercial building to include stores, hotels and motels, warehouses, hospitals, office buildings, schools, restaurants, etc.
- 3.3.2 Determine sign and show-window demand loads.

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- 3.3.3 Determine the demand loads for multi-outlet assemblies.
- 3.3.4 Determine the receptacle demand loads for offices and banks.
- 3.3.5 Determine the receptacle demand load for general commercial applications.
- 3.3.6 Determine the demand loads for commercial kitchens.
- 3.3.7 Use the optional method for commercial demand load calculations.
- 3.3.8 Determine the demand load for manufactured home parks, recreational vehicle parks, and marinas.
- 3.3.9 Determine the ampacity of conductors based on the type of special equipment (e.g., welders, electrical vehicles, HVAC, signs, etc.).
- 3.3.10 Determine the service size for any commercial installation.

CONTENT STANDARD 4.0: CONDUCTOR CALCULATIONS

Performance Standard 4.1: Raceway and Box Calculations

- 4.1.1 Determine the cross-sectional area of any conductor using NEC Chapter 9, table 5.
- 4.1.2 Determine the cross-sectional area of compact conductors using NEC Chapter 9, Table 5(A).
- 4.1.3 Understand and apply raceway fill limitations.
- 4.1.4 Size any raceway for the required wire fill.
- 4.1.5 Define and size raceway nipples for required wire fill.
- 4.1.6 Calculate conductor fill when using various sizes and/or types of conductors.
- 4.1.7 Calculate raceway size for multi-conductor and optical fiber cables.
- 4.1.8 Determine raceway fill using Annex C of the NEC.
- 4.1.9 Size a wireway for conductor fill.
- 4.1.10 Properly size an outlet or junction box based on wire fill.
- 4.1.11 Properly calculate the box fill of conductors, clamps, support fittings, devices or equipment, and grounding conductors.
- 4.1.12 Size pull and junction boxes for 4 AWG and larger wire.
- 4.1.13 Install conduits containing the same conductors the correct distance apart (4 AWG and larger).
- 4.1.14 Properly size the depth of pull boxes and conduit bodies when conductors enter opposite a removable cover.

Performance Standard 4.2: Conductor Sizing and Protection Calculations

- 4.2.1 Determine conductor properties.
- 4.2.2 Determine applications of insulation types based on NEC.
- 4.2.3 Determine conductor size for loads.
- 4.2.4 Determine conductor sizing based on the termination temperature rating.
- 4.2.5 Properly size the overcurrent device for loads.
- 4.2.6 Properly apply NEC Article 240 rules for small conductors.
- 4.2.7 Apply ampacity adjustment factors for temperature, wire fill, etc.
- 4.2.8 Identify when the neutral conductor is counted as current carrying when applying ampacity adjustment factors.
- 4.2.9 Apply ampacity adjustment to wireways.

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- 4.2.10 Size conductors for continuous loads after ampacity adjustment.
- 4.2.11 Properly size feeders based on loads and adjustment factors.
- 4.2.12 Properly size tap conductors using the 10- and 25-foot rules (NEC Article 240).

Performance Standard 4.3: Voltage Drop Calculations

- 4.3.1 State the recommended voltage drop according the NEC.
- 4.3.2 Use the information in Chapter 9, Table 8 to calculate the resistance of any conductor based on size and length.
- 4.3.3 Use the voltage drop formulas for single-phase and three-phase systems.
- 4.3.4 Size conductors to account for voltage drop.

Performance Standard 4.4: Motors: Article 430 of the NEC

- 4.4.1 Determine the full load current of any motor according to the NEC.
- 4.4.2 Size the branch circuit wire size for any motor.
- 4.4.3 Determine the appropriate circuit protection for any motor.
- 4.4.4 Use the motor name plate to size overloads.
- 4.4.5 Explain the difference between overload protection and short-circuit/ground-fault protection.
- 4.4.6 Size a feeder for any set of motors.
- 4.4.7 Size the feeder short-circuit/ground-fault overcurrent device.

Performance Standard 4.5: Transformers: Article 450 of the NEC

- 4.5.1 Calculate the high leg voltage of a delta-connected transformer.
- 4.5.2 Calculate the primary and secondary line current of single- and three-phase transformers.
- 4.5.3 Calculate the primary and secondary overcurrent protection for a transformer.
- 4.5.4 Calculate and select the proper conductor size for the primary and secondary of a transformer.
- 4.5.5 Properly size the grounding electrode conductor and bonding jumpers.

CONTENT STANDARD 5.0: MOTOR CONTROLS

Performance Standard 5.1: Basic Principles of Motor Controls

- 5.1.1 Recognize ladder diagrams.
- 5.1.2 Recognize wiring/connection diagrams.
- 5.1.3 Recognize pictorial diagrams.
- 5.1.4 Use and interpret definitions, abbreviations, and graphic symbols used on motor control diagrams.
- 5.1.5 Describe the function of pushbutton stations, solenoids, flow switches, pressure switches, limit switches, and timing relays.
- 5.1.6 Define the basic operation of variable frequency drives.

Performance Standard 5.2: Components of Magnetic Control Circuits

- 5.2.1 Use a ladder diagram to illustrate a simple two-wire control circuit for a single-phase motor operated by a float switch or similar device.
- 5.2.2 Use a ladder diagram to identify a simple start/stop station operating a motor starter.

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- 5.2.3 Identify circuit types classified by power source (e.g., common control circuits, transformer control wiring, and separate control wiring).
- 5.2.4 Identify control devices and their function.
- 5.2.5 Identify remote-control circuits and their function.
- 5.2.6 Identify the components of a magnetic motor starter.
- 5.2.7 Design both two-wire and three-wire controls using start/stop stations and other devices such as float switches.
- 5.2.8 Design a circuit operating a motor starter using two or more start/stop stations.

Performance Standard 5.3: Overcurrent Protection for Control Circuits

- 5.3.1 Use the NEC to properly protect control circuits to include conductor sizes, overcurrent protection, and control transformers.

Performance Standard 5.4: Indicator Lights, Illuminated Pushbuttons, and Selector Switch Truth Tables

- 5.4.1 Understand the use of illumination in motor controls.
- 5.4.2 Interpret symbols used on diagrams.
- 5.4.3 Read truth tables.
- 5.4.4 Diagram the use of a selector switch on a three-wire control for a jogging application.

Performance Standard 5.5: Reversing Motor Controls

- 5.5.1 Understand the operation of a reversing starter with interlocks.
- 5.5.2 Understand the operation of a reversing control station.
- 5.5.3 Understand the operation of a reversing control selector switch.
- 5.5.4 Apply functional indicator lights to reversing controls.
- 5.5.5 Understand reversing operations using limit switches.
- 5.5.6 Understand the operation of reversing a single-phase motor.

Performance Standard 5.6: Sequencing Control and Master Stop Function

- 5.6.1 Interpret a diagram showing the sequencing of several motors.
- 5.6.2 Apply the master stop function to a process using motor controls.

Performance Standard 5.7: Sequencing Control and Master Stop Function

- 5.7.1 Describe the major characteristics of each type of electrical and electronic diagrams. Compare the special functions included on ladder diagrams and PLC programming diagrams.
- 5.7.2 Compare the applications and component arrangements of wiring diagrams and schematic diagrams.
- 5.7.3

Performance Standard 5.8: Industrial Control System

- 5.8.1 Compare the common component types and voltage levels of power and control circuits.
- 5.8.2 Identify the common numbering systems that are used in control circuit diagrams. Describe the purpose of each logic function and the device arrangements used to form each one.
- 5.8.3

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CONTENT STANDARD 1.0: GENERAL NEC REQUIREMENTS

Performance Standard 1.1: Electrical Installation Requirements: Articles 90, 100, and 110

- 1.1.1 Identify scope of the NEC.
- 1.1.2 Define terms as they apply to the NEC.
- 1.1.3 Determine the proper termination of conductors.
- 1.1.4 Determine the kinds of warnings, markings, and identification a given installation requires.
- 1.1.5 Determine the proper working clearance for any installation.
- 1.1.6 Determine proper voltage rating.

CONTENT STANDARD 2.0: WIRING AND PROTECTION

Performance Standard 2.1: Use and Identification of Grounded Conductors, Branch Circuits, and Feeders: Articles 200, 210 and 215

- 2.1.1 Properly identify a grounded conductor.
- 2.1.2 Properly apply the general provisions of Article 210.
- 2.1.3 Properly apply the branch circuits ratings of Article 210.
- 2.1.4 Properly install the required outlets of Article 210.
- 2.1.5 Calculate the minimum size and ampacity of any feeder.

Performance Standard 2.2: Branch Circuit, Feeder, and Service Calculations: Article 220

- 2.2.1 Calculate the loads for a single family dwelling.
- 2.2.2 Calculate the loads for a multifamily dwelling.
- 2.2.3 Calculate the loads for a commercial or industrial installation.

Performance Standard 2.3: Outside Branch Circuits and Feeders, Services: Articles 225 and 230

- 2.3.1 Determine the proper installation for conductors and lighting installed outdoors.
- 2.3.2 Determine vertical and horizontal clearance of overhead conductors.
- 2.3.3 Determine proper disconnecting means and installation.
- 2.3.4 Determine the proper installation and protection of conductors.

Performance Standard 2.4: Overcurrent Protection: Article 240

- 2.4.1 Properly size a standard overcurrent device to any conductor.
- 2.4.2 Properly apply the small conductor rules.
- 2.4.3 Calculate transformer secondary conductor protection.
- 2.4.4 Reference requirements for appliance protection.
- 2.4.5 Calculate tap conductor protection.
- 2.4.6 Reference protection for motors and air conditioners.

Performance Standard 2.5: Grounding and Bonding: Article 250

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- 2.5.1 Define the difference between grounding and bonding.
- 2.5.2 Determine the proper grounding and bonding requirements of any system.
- 2.5.3 Properly size the main bonding jumper.
- 2.5.4 Properly size the grounding electrode conductor.
- 2.5.5 Properly size equipment grounding conductors.
- 2.5.6 Determine the various types of grounding conductors.
- 2.5.7 Design a proper grounding electrode system.

Performance Standard 2.6: Surge Protective Devices: Article 285

- 2.6.1 Determine the installation requirements of SPDs.
- 2.6.2 Discuss the difference between Type 1, Type 2, Type 3, and Type 4 SPDs and their use.

CONTENT STANDARD 3.0: WIRING METHODS AND MATERIALS

**Performance Standard 3.1: Wiring Methods and Conductors for General Wiring:
Articles 300 and 310**

- 3.1.1 Determine how to route, splice, protect, and secure conductors and raceways.
- 3.1.2 Determine the general requirements for conductors such as insulation markings, ampacity ratings, and conductors to use in specific installations.
- 3.1.3 Properly use the Article 310 tables.
- 3.1.4 Apply Chapter 9 tables.
- 3.1.5 Apply adjustment factors to any conductor based on wire fill, temperature, and continuous load.
- 3.1.6 Define the meaning of conductor insulation lettering.
- 3.1.7 Determine when a neutral conductor is to be counted as a current-carrying conductor.

Performance Standard 3.2: Enclosures: Articles 312 and 314

- 3.2.1 Determine the use of any enclosure based on the conditions of use.
- 3.2.2 Determine the installation requirements for any enclosure.
- 3.2.3 Properly use boxes and fittings based on internal volume.
- 3.2.4 Determine the requirements for fill of boxes and fittings.
- 3.2.5 Properly size pull and junction boxes for No. 4 AWG conductors and larger.

Performance Standard 3.3: Cables: Articles 320, 330, 334, 338, and 340

- 3.3.1 Determine the installation requirements of Armored Cable.
- 3.3.2 Determine the installation requirements of Metal-Clad Cable.
- 3.3.3 Determine the installation requirements of Nonmetallic-Sheathed Cable.
- 3.3.4 Determine the installation requirements of Service-Entrance Cable.
- 3.3.5 Determine the installation requirements of Underground Feeder and Branch-Circuit Cable (Type UF).
- 3.3.6 Relate temperature concerns, derating, etc. to other appropriate articles in the NEC.

**Performance Standard 3.4: Metal Raceways: Articles 342, 344, 348, 350, 352, 356,
358, and 362**

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- 3.4.1 Determine the installation requirements of Intermediate Metal conduit.
- 3.4.2 Determine the installation requirements of Ridged Metal Conduit.
- 3.4.3 Determine the installation requirements of Flexible Metal Conduit.
- 3.4.4 Determine the installation requirements of Liquidtight Flexible Metal Conduit.
- 3.4.5 Determine the installation requirements of Rigid Polyvinyl Chloride Conduit.
- 3.4.6 Determine the installation requirements of Liquidtight Flexible Nonmetallic Conduit.
- 3.4.7 Determine the installation requirements of Electrical Metallic Tubing.
- 3.4.8 Determine the installation requirements of Electrical Nonmetallic Tubing.
- 3.4.9 Relate conductor fill, derating, etc. to other appropriate articles in the NEC.

Performance Standard 3.5: Metal Wireways, Multioutlet Assemblies, Surface Metal Raceways, Cable Trays: Articles 376, 380, 386, 392

- 3.5.1 Determine the proper installation of a metal wireway.
- 3.5.2 Calculate the proper conductor fill of a metal wireway.
- 3.5.3 Calculate the proper size of a metal wireway based on conductor size and conduit entries.
- 3.5.4 Determine provisions for properly splicing conductors in a metal wireway.
- 3.5.5 Determine the proper installation of multioutlet assemblies.
- 3.5.6 Determine the proper installation of surface metal raceways.
- 3.5.7 Determine the proper installation and use of cable trays.

CONTENT STANDARD 4.0: EQUIPMENT FOR GENERAL USE

Performance Standard 4.1: Flexible Cords, Flexible Cables, and Fixture Wires: Articles 400 and 402

- 4.1.1 Identify requirements, applications, and construction specifications of cords and cables.
- 4.1.2 Select cords, cables, and fittings listed for specific applications.
- 4.1.3 Identify requirements and specifications of fixture wires.

Performance Standard 4.2: Switches, Receptacles, Cord Connectors, and Attachment Plugs: Articles 404 and 406

- 4.2.1 Determine types and uses of switches.
- 4.2.2 Determine types and uses of receptacles.

Performance Standard 4.3: Switchboards, Switchgear, and Panelboards: Article 408

- 4.3.1 Determine the specific requirements for switchboards, switchgear, and panelboards that control power and lighting circuits.
- 4.3.2 Properly identify the labeling requirements of each circuit in a panelboard or switchboard.
- 4.3.3 Determine proper termination of conductors in panelboards and switchboards.

Performance Standard 4.4: Luminaires, Lampholders, and Lamps: Article 410

- 4.4.1 Determine the general requirements of Article 410.

Performance Standard 4.5: Lighting Systems Operating at 30 Volts or Less:

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Article 411

- 4.5.1 Determine proper installation of low voltage lighting.

Performance Standard 4.6: Appliances, Fixed Electric Space Heating

Equipment: Articles 422 and 424

- 4.6.1 Calculate and determine proper branch circuit ratings for any appliance.
4.6.2 Calculate and determine proper overcurrent protection for any appliance.
4.6.3 Determine the requirements for nonmotor appliances.
4.6.4 Determine proper disconnecting means.
4.6.5 Determine requirements for heating installations.

Performance Standard 4.7: Motors, Motor Circuits, and Controllers; Air-Conditioning and Refrigeration Equipment: Articles 430 and 440

- 4.7.1 Determine the proper conductor size for any motor.
4.7.2 Determine the proper overcurrent protection for any motor.
4.7.3 Determine the proper disconnect for any motor.
4.7.4 Determine the proper overload protection for any motor and condition (easy start, hard start, etc.).
4.7.5 Determine the minimum size feeder for a group of motors.
4.7.6 Determine the feeder overcurrent protection.
4.7.7 Determine proper size of circuits and overcurrent devices for air conditioning and refrigeration equipment.
4.7.8 Determine the requirements for the disconnecting means of refrigeration equipment.

CONTENT STANDARD 5.0: SPECIAL OCCUPANCIES

Performance Standard 5.1: Hazardous Locations: Articles 500 through 504

- 5.1.1 Determine proper wiring of a hazardous location.

Performance Standard 5.2: Commercial Garages, Motor Fuel Dispensing Facilities: Articles 511 and 514

- 5.2.1 Define a major repair garage.
5.2.2 Define a minor repair garage.
5.2.3 Classify hazardous areas.
5.2.4 Determine proper wiring methods for a commercial garage of any type.
5.2.5 Define a Motor Fuel Dispensing Facility.
5.2.6 Determine proper wiring methods for Motor Fuel Dispensing Facilities.

Performance Standard 5.3: Health Care Facilities: Article 517

- 5.3.1 Define health care facility types.
5.3.2 Define General Care Areas and Critical Care Areas.
5.3.3 Discuss Essential Electrical Systems.
5.3.4 Determine proper wiring and grounding for a health care facility.

Performance Standard 5.4: Assembly Occupancies, Carnivals, Fairs, and Similar

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Events: Articles 518 through 525

- 5.4.1 Discuss the proper wiring methods for places of assembly.
- 5.4.2 Discuss the proper wiring of carnivals, fairs, and similar events.

Performance Standard 5.5: Agricultural Buildings: Article 547

- 5.5.1 Determine the proper wiring method for any agricultural building.
- 5.5.2 Determine proper grounding for any agricultural building.

Performance Standard 5.6: Marinas and Boatyards: Article 555

- 5.6.1 Determine marina requirements using the NEC.

Performance Standard 5.7: Temporary Installations: Article 590

- 5.7.1 Determine the requirements for temporary installations.

CONTENT STANDARD 6.0: SPECIAL EQUIPMENT

Performance Standard 6.1: Electric Signs and Outline Lighting, Manufactured Wiring Systems: Articles 600 and 604

- 6.1.1 Determine proper installation and requirements of electric signs and associated lighting.
- 6.1.2 Determine proper installation of manufactured wiring systems.

Performance Standard 6.2: Cranes and Hoists: Article 610

- 6.2.1 Determine proper wiring of cranes and hoists.

Performance Standard 6.3: Elevators, Escalators, and Moving Walks: Article 620

- 6.3.1 Determine proper installation requirements of elevators, escalators, and moving walks.

Performance Standard 6.4: Audio Signal Processing, Amplification, Reproduction Equipment: Article 640

- 6.4.1 Determine proper wiring methods for audio equipment.

Performance Standard 6.5: Information Technology Equipment: Article 645

- 6.5.1 Define an IT room.
- 6.5.2 Determine proper installation of wiring in IT rooms.

Performance Standard 6.6: Swimming Pools, Spas, Hot Tubs, Fountains, and Similar Locations: Article 680

- 6.6.1 Determine proper electrical installations for swimming pools.
- 6.6.2 Determine proper electrical installations for spas and hot tubs.
- 6.6.3 Determine proper electrical installations for fountains.

CONTENT STANDARD 7.0: SPECIAL CONDITIONS

Performance Standard 7.1: Emergency Standby Power Systems, Legally Required Power Systems, Optional Standby Power Systems: Articles 700 through 702

- 7.1.1 Determine the proper installation of standby power systems.
- 7.1.2 Determine the difference between emergency standby, legally required standby, and optional standby power systems.

Performance Standard 7.2: Remote-Control, Signaling, and Power-Limited Circuits: Article 725

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- 7.2.1 Define circuit classes.
- 7.2.2 Determine proper installation and requirements of different circuit classes.

Performance Standard 7.3: Fire Alarm Systems: Article 760

- 7.3.1 Define nonpower-limited fire alarm circuits.
- 7.3.2 Define power-limited fire alarm circuits.
- 7.3.3 Determine the proper installation of fire alarm wiring using the NEC.
- 7.3.4 Determine where the use of GFCI and AFCI are restricted.
- 7.3.5 Determine proper cable types.

CONTENT STANDARD 8.0: COMMUNICATION SYSTEMS

Performance Standard 8.1: Optical Fiber Cables and Raceways; Communications Systems: Articles 770 and 800 through 820

- 8.1.1 Determine proper installation of optical fiber cables.
- 8.1.2 Determine proper grounding of communications wiring and equipment.
- 8.1.3 Determine proper installations of communication wiring.

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CONTENT STANDARD 1.0: TRADE MATH

Performance Standard 1.1: Basic Math

- 1.1.1 Perform addition, subtraction, multiplication, and division calculations of whole numbers.
- 1.1.2 Perform addition and subtraction calculations of common fractions.
- 1.1.3 Perform multiplication and division calculations of common fractions.
- 1.1.4 Perform addition, subtraction, multiplication, and division calculations of decimal fractions.
- 1.1.5 Perform ratio and proportion calculations.
- 1.1.6 Perform percent, percentage, and discount calculations.
- 1.1.7 Perform angular, length, and converted temperature measure calculations.
- 1.1.8 Perform area calculations.
- 1.1.9 Perform volume calculations.
- 1.1.10 Solve basic equations.
- 1.1.11 Demonstrate the use of order of operations.

CONTENT STANDARD 2.0: GENERAL SAFETY

Performance Standard 2.1: Workplace Safety

- 2.1.1 Describe potential excavation site hazards.
- 2.1.2 Explain proper personal protective equipment (PPE) use.
- 2.1.3 Describe proper material handling, storage, use, and disposal.
- 2.1.4 Describe ladder, stairway, and scaffold hazards and proper use.
- 2.1.5 Describe jobsite electrical hazards and proper lockout/tagout use.
- 2.1.6 Describe proper refrigerant and pressure vessel usage and storage.
- 2.1.7 Identify safety data sheets (SDS) properties of chemicals specific to HVAC.
- 2.1.8 Identify and describe environmental hazards (e.g. lead, silica, asbestos, carbon monoxide).
- 2.1.9 Identify the hazards associated with confined spaces.
- 2.1.10 Use appropriate fire extinguishers and other such safety devices.
- 2.1.11 Identify the importance safety procedures for brazing and soldering.

CONTENT STANDARD 3.0: TOOLS AND MATERIALS

Performance Standard 3.1: Power and Hand Tool Use

- 3.1.1 Describe proper hand tool use.
- 3.1.2 Describe proper power tool use.
- 3.1.3 Identify proper use of various types of torches.
- 3.1.4 Identify proper use of piping and tubing fabrication tools.

Performance Standard 3.2: Tubing and Piping

- 3.2.1 Identify the purpose of the piping, tubing and fittings used in the heating, air-conditioning, and refrigeration industry.
- 3.2.2 Identify appropriate brazing and soldering alloys and materials.
- 3.2.3 Explain the purposes and procedures for protecting piping materials and fabrication, such as valves, fittings, and products from heat.

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CONTENT STANDARD 4.0: FUEL GAS PIPING AND VENTING

Performance Standard 4.1: Fuel Gas Piping and Venting

- 4.1.1 Identify HVAC IDAPA (define) rules and statutes.
- 4.1.2 Define key terms as applied to the IFGC.
- 4.1.3 Describe the building structural safety requirements for fuel gas equipment installation.
- 4.1.4 Determine proper fuel gas equipment combustion, ventilation, and dilution air requirements.
- 4.1.5 Identify the requirements for installation of fuel gas fired equipment in a masonry chimney.
- 4.1.6 Identify fuel gas equipment location, access, and service space requirements.
- 4.1.7 Describe proper appliance condensate disposal and clearance reduction methods.
- 4.1.8 Perform gas pipe sizing exercises.
- 4.1.9 Identify proper gas pipe installation methods.
- 4.1.10 Describe proper gas pipe inspection, testing, and purging procedures.
- 4.1.11 Describe chimney and vent types and construction.
- 4.1.12 Determine chimney installation requirements.
- 4.1.13 Determine gas vent installation requirements.
- 4.1.14 Describe gas appliance category I, II, III, IV characteristics.
- 4.1.15 Identify proper gas vent connector installation requirements.
- 4.1.16 Describe category I venting principles.
- 4.1.17 Perform single appliance category I vent sizing exercises.
- 4.1.18 Perform multiple appliance category I vent sizing exercises.
- 4.1.19 Determine capacity penalties for offsets in common vent and vent connectors.
- 4.1.20 Determine specific fuel gas appliance installation requirements.
- 4.1.21 Determine mechanical equipment location, access, and service space requirements.
- 4.1.22 Determine combustion air location and sizing requirements.

CONTENT STANDARD 5.0: ENERGY SOURCES

Performance Standard 5.1: Energy Sources

- 5.1.1 Explain natural, LP gas, and fuel oil combustion characteristics.
- 5.1.2 Describe the application of geothermal systems.
- 5.1.3 Describe the application of renewable energy systems.
- 5.1.4 Describe the application of electric production systems.

CONTENT STANDARD 6.0: BASIC SYSTEMS OVERVIEW

Performance Standard 6.1: Basic Systems Overview

- 6.1.1 Describe fossil-fuel and electrical furnace operations.
- 6.1.2 Describe the typical configuration of residential split air conditioning systems.
- 6.1.3 List various types of commercial air conditioning systems and their application.
- 6.1.4 Describe the configuration of common duct systems.

CONTENT STANDARD 7.0: INTRO TO APPLIED SCIENCE

Performance Standard 7.1: Intro to Applied Science

- 7.1.1 Perform energy conversion calculations.
- 7.1.2 Perform sensible, latent, and total heat calculations.

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- 7.1.3 Differentiate between saturated, superheated, and subcooled refrigerant.
- 7.1.4 Explain atmospheric, absolute, and gauge pressure relationship.
- 7.1.5 Convert gauge pressure, absolute pressure, and vacuum.
- 7.1.6 Diagram a basic refrigeration cycle identifying pressure, temperature, and state of refrigerant.
- 7.1.7 List the type and function of the four major refrigeration components.
- 7.1.8 Describe the methods of heat transfer.

CONTENT STANDARD 8.0: APPLIANCE INSTALLATION

Performance Standard 8.1: Appliance Installation

- 8.1.1 Apply NEC standards to HVAC electrical circuit installations.
- 8.1.2 Interpret HVAC manufacturer electrical name plate data.
- 8.1.3 Apply appropriate code standards.
- 8.1.4 Describe gas, oil, and electrical appliance installation, start-up, and checkout procedures.
- 8.1.5 Describe sheet metal, fiberglass, and flex duct installation procedures.
- 8.1.6 Describe split and packaged air conditioning system installation, start-up, and checkout procedures.

CONTENT STANDARD 9.0: INTRODUCTION TO CONSTRUCTION DRAWINGS AND SPECIFICATIONS

Performance Standard 9.1: Introduction to Construction Drawings and Specifications

- 9.1.1 Identify the application of architectural plans and specifications.
- 9.1.2 Interpret mechanical, plumbing, and electrical drawing symbols.
- 9.1.3 Interpret specification documents and apply to plans.
- 9.1.4 Interpret shop drawings and apply to plans and specifications.
- 9.1.5 Describe a submittal and its derivation, routing, and makeup.
- 9.1.6 Develop cut lists for duct runs from shop drawings.
- 9.1.7 Interpret as-built modifications on HVAC mechanical plans.
- 9.1.8 Perform HVAC equipment and material takeoff.

CONTENT STANDARD 10.0: BASIC ELECTRICITY

Performance Standard 10.1: Basic Electricity

- 10.1.1 Describe basic electrical theory.
- 10.1.2 Describe series, parallel, and combination circuit characteristics.
- 10.1.3 Calculate electrical circuit values.
- 10.1.4 Describe electrical meter functions.
- 10.1.5 Measure electrical circuit values.
- 10.1.6 Identify electrical symbols.
- 10.1.7 Draw basic HVAC electrical circuit diagrams.
- 10.1.8 Interpret basic residential HVAC schematic diagrams.
- 10.1.9 Interpret basic commercial HVAC schematic diagrams.
- 10.1.10 Explain AC circuit characteristics.
- 10.1.11 Describe power distribution transformer systems.

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- 10.1.12 Calculate HVAC branch circuit conductor, breaker, and disconnect sizes.
- 10.1.13 Describe basic motor theory.
- 10.1.14 Describe the five single-phase motor types.
- 10.1.15 Identify single-phase motor diagrams.
- 10.1.16 Explain single-phase motor starting relay operation.
- 10.1.17 Calculate motor capacitor replacement values.
- 10.1.18 Explain three-phase motor operation.
- 10.1.19 Explain ECM motor operation.
- 10.1.20 Perform Ohm's law calculations to series, parallel, and combination circuits.

CONTENT STANDARD 11.0: INDOOR AIR QUALITY

Performance Standard 11.1: Indoor Air Quality

- 11.1.1 Describe indoor air quality (IAQ) factors as related to HVAC.
- 11.1.2 Identify various indoor air quality pollutant and pollutant pathways.
- 11.1.3 Describe indoor air quality evaluation and measurement tools.
- 11.1.4 Explain appropriate prevention, control, and resolution strategies for IAQ issues.
- 11.1.5 Recognize when to involve IAQ professionals as necessary.

CONTENT STANDARD 12.0: RESIDENTIAL LOAD CALCULATIONS

Performance Standard 12.1: Residential Load Calculations

- 12.1.1 Identify the importance of heat load calculation in building design.
- 12.1.2 Differentiate sensible, latent, and total heat gain/loss.
- 12.1.3 Determine U values and R values for various building construction components.
- 12.1.4 Calculate Btu gain/loss values using HTM and temperature difference factors.
- 12.1.5 Determine heating and cooling load temperature difference and daily range values.
- 12.1.6 Explain the relationship between house orientation and solar heat gain.
- 12.1.7 Perform building component area and volume calculations from construction drawings.
- 12.1.8 Perform winter/summer infiltration calculations using Manual J procedures.
- 12.1.9 Perform heat gain calculations using Manual J procedures.
- 12.1.10 Perform heat loss calculations using Manual J procedures.
- 12.1.11 Determine sensible, latent, and total heat for house block and room values.

CONTENT STANDARD 13.0: BASIC CONTROLS

Performance Standard 13.1: Basic Controls

- 13.1.1 Differentiate between operating and safety controls.
- 13.1.2 Describe the sequence of operation of standing pilot, intermittent, and direct ignition control systems.
- 13.1.3 Interpret basic gas furnace wiring diagrams.
- 13.1.4 Explain oil furnace primary control operation.
- 13.1.5 Describe electric furnace operating sequence.
- 13.1.6 Describe hydronic heating system controls.
- 13.1.7 Describe basic motor circuit troubleshooting procedures.
- 13.1.8 Interpret packaged and split air conditioning systems and wiring diagrams.
- 13.1.9 Identify commercial and industrial air conditioning system control methods.
- 13.1.10 Describe basic electronic control system troubleshooting procedures.

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CONTENT STANDARD 14.0: SYSTEM AIR FLOW AND DUCT SIZING

Performance Standard 14.1: System Air Flow and Duct Sizing

- 14.1.1 Describe basic air flow characteristics.
- 14.1.2 Explain duct system pressures.
- 14.1.3 Calculate duct system air flow.
- 14.1.4 Determine proper air flow requirements.
- 14.1.5 Describe air distribution system configurations.
- 14.1.6 Select primary heating/cooling equipment using nationally recognized standards.
- 14.1.7 Determine air-side component pressure drops from manufacturer tables.
- 14.1.8 Sketch a residential duct system layout using nationally recognized standards.
- 14.1.9 Determine duct size based on nationally recognized standards.

CONTENT STANDARD 15.0: BASIC AIR CONDITIONING AND REFRIGERATION

Performance Standard 15.1: Basic Air Conditioning and Refrigeration

- 15.1.1 Explain latent, sensible, and total heat differences.
- 15.1.2 Diagram refrigeration cycle conditions and components.
- 15.1.3 Explain pressure-enthalpy diagrams.
- 15.1.4 Describe compressor design differences, efficiencies, and applications.
- 15.1.5 Explain water/air-cooled condenser operation and performance.
- 15.1.6 Describe metering device design and operation.
- 15.1.7 Describe refrigeration accessory components and operation.
- 15.1.8 Describe evaporator types.
- 15.1.9 Identify proper refrigerant line sizing and installation practices.
- 15.1.10 Explain various refrigerant physical and chemical properties.
- 15.1.11 Explain refrigerant oil properties and application.
- 15.1.12 Describe proper refrigeration system access procedures.
- 15.1.13 Differentiate between recovered, recycled, and reclaimed refrigerant.
- 15.1.14 Describe proper refrigerant recovery, evacuation, and charging procedures.
- 15.1.15 Describe the operation of a variable refrigerant flow system.

CONTENT STANDARD 16.0: INTRODUCTION TO HYDRONIC SYSTEMS

Performance Standard 16.1: Introduction to Hydronic Systems

- 16.1.1 Identify hydronic piping system configurations.
- 16.1.2 Describe hydronic system components.
- 16.1.3 Explain hydronic systems drain and fill procedures.
- 16.1.4 Diagram basic hydronic system control circuits.

CONTENT STANDARD 17.0: BASIC SHEET METAL

Performance Standard 17.1: Basic Sheet Metal

- 17.1.1 Define sheet metal layout terms.
- 17.1.2 Explain parallel line development procedures.
- 17.1.3 Layout and fabricate the following sheet metal fitting: Pittsburgh seam and square elbow.
- 17.1.4 Layout and fabricate the following sheet metal fitting: 90 degree elbow and transition.
- 17.1.5 Explain radial line development procedures.

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- 17.1.6 Layout and fabricate the following sheet metal fitting: symmetrical tapered duct.
- 17.1.7 Layout and fabricate the following sheet metal fitting: square to square tapered duct.
- 17.1.8 Explain triangulation development procedures.
- 17.1.9 Layout and fabricate the following sheet metal fitting: two-way offset transition.
- 17.1.10 Layout and fabricate the following sheet metal fitting: tapered duct section.

CONTENT STANDARD 18.0: INTRODUCTION TO SERVICE

Performance Standard 18.1: Introduction to Service

- 18.1.1 Identify air conditioning system problems.
- 18.1.2 Prescribe air conditioning system problem solutions.
- 18.1.3 Identify gas heating system problems.
- 18.1.4 Prescribe gas heating system problem solutions.
- 18.1.5 Identify oil heating system problems.
- 18.1.6 Prescribe oil heating system problem solutions.
- 18.1.7 Identify electric heating system problems.
- 18.1.8 Prescribe electric heating system problem solutions.
- 18.1.9 List gas, oil, and electric heating and air conditioning maintenance procedures.

CONTENT STANDARD 19.0: FUNDAMENTALS OF PSYCHOMETRICS

Performance Standard 19.1: Fundamentals of Psychometrics

- 19.1.1 Explain psychometric properties.
- 19.1.2 Diagram psychometric conditions.
- 19.1.3 Describe comfort conditions as applied to psychometric properties.
- 19.1.4 Use the psychometric chart to measure enthalpy.

CONTENT STANDARD 20.0: TESTING AND BALANCING

Performance Standard 20.1: Testing and Balancing

- 20.1.1 Describe air flow and water flow measuring devices.
- 20.1.2 Explain basic air flow and water flow balancing procedures.

CONTENT STANDARD 21.0: INTRODUCTION TO HVAC CONTROL STRATEGIES

Performance Standard 21.1: Introduction to HVAC Control Strategies

- 21.1.1 Describe basic HVAC control principles.
- 21.1.2 Interpret basic HVAC pneumatic control diagrams.
- 21.1.3 Explain DDC control system basic operation.

CONTENT STANDARD 22.0: ADVANCED HVAC SYSTEMS

Performance Standard 22.1: HVAC Systems

- 22.1.1 Explain commercial fan coil unit operation.
- 22.1.2 Explain package unit building system configurations.
- 22.1.3 Describe building chilled water system operation.
- 22.1.4 Describe induced and forced draft cooling tower operation.

Performance Standard 22.2: Heat Pump Systems

- 22.2.1 Explain heat pump heating and cooling cycles.
- 22.2.2 Describe the purpose and operation of various heat pump components.
- 22.2.3 Prescribe heat pump charging procedures.

HVAC APPRENTICESHIP PROGRAM STANDARDS

2018

- 22.2.4 Differentiate heat pump time/temperature and demand defrost control systems.
- 22.2.5 Explain geothermal heat pump system applications.
- 22.2.6 Describe water-to-air and air-to-water heat pump operation.

CONTENT STANDARD 23.0: ADVANCED TROUBLESHOOTING

Performance Standard 23.1: Advanced Troubleshooting

- 23.1.1 Describe air flow troubleshooting procedures.
- 23.1.2 Determine operating conditions at variable loads.
- 23.1.3 Describe refrigeration side troubleshooting procedures.
- 23.1.4 Troubleshoot residential and commercial control systems.
- 23.1.5 Interpret manufacturer schematics.
- 23.1.6 Analyze furnace troubleshooting values.
- 23.1.7 Apply furnace troubleshooting values.

CONTENT STANDARD 24.0: CODE REVIEW

Performance Standard 24.1: Code Review

- 24.1.1 Apply international fuel gas code standards.
- 24.1.2 Apply international mechanical code standards.
- 24.1.3 Apply HVAC rules and statutes as it pertains to the IDAPA administrative code.

PLUMBING APPRENTICESHIP PROGRAM STANDARDS

2018

CONTENT STANDARD 1.0: INTRODUCTION TO THE PLUMBING PROFESSION

Performance Standard 1.1: Introduction to the Plumbing Profession

- 1.1.1 Describe Idaho Plumbing Code and Administrative Rules requirements.
- 1.1.2 Identify the basic principles on which plumbing is based.
- 1.1.3 Identify and maintain licensing, certification, and industry credentialing requirements.

CONTENT STANDARD 2.0: PLUMBING SAFETY

Performance Standard 2.1: Plumbing Safety

- 2.1.1 Complete OSHA 10 Certification.
- 2.1.2 Identify common unsafe acts and conditions that cause accidents and how to handle these situations to make them safer.
- 2.1.3 Identify job site hazards – work specific to plumbers.
- 2.1.4 Complete First Aid and CPR Certification.
- 2.1.5 Use appropriate fire extinguishers and other safety devices.

CONTENT STANDARD 3.0: INTRODUCTION TO HAND TOOLS AND POWER TOOLS

Performance Standard 3.1: Hand Tools

- 3.1.1 Identify the types of hand tools used in the plumbing profession.
- 3.1.2 Demonstrate proper use and care of basic hand tools.
- 3.1.3 Identify the types of Personal Protective Equipment (PPE) required for hand tool use.

Performance Standard 3.2: Power Tools

- 3.2.1 Identify the types of power tools used in the plumbing profession.
- 3.2.2 Demonstrate proper use and care of basic power tools.
- 3.2.3 Identify the types of Personal Protective Equipment (PPE) required for power tool use.

CONTENT STANDARD 4.0: FITTINGS, PIPE, AND VALVES

Performance Standard 4.1: Fittings and Valves

- 4.1.1 Identify the proper fittings and/or valves for specific systems.
- 4.1.2 Apply the various fittings and valves by type, size, materials and application.

Performance Standard 4.2: Types of Pipe

- 4.2.1 Identify the common types of pipes.
- 4.2.2 Identify the proper pipes for specific systems.

CONTENT STANDARD 5.0: INDUSTRY MATH

Performance Standard 5.1: Basic Mathematics

- 5.1.1 Perform addition, subtraction, multiplication, and division calculations of whole numbers.
- 5.1.2 Perform addition, subtraction, multiplication, and division calculations of common fractions.
- 5.1.3 Perform addition, subtraction, multiplication, and division calculations of decimal fractions.
- 5.1.4 Perform ratio and proportion calculations.
- 5.1.5 Perform percent, percentage, and discount calculations.
- 5.1.6 Perform area calculations.
- 5.1.7 Perform volume calculations.
- 5.1.8 Solve basic equations.

PLUMBING APPRENTICESHIP PROGRAM STANDARDS

2018

5.1.9 Demonstrate the use of order of operations.

Performance Standard 5.2: Applied Mathematics

- 5.2.1 Determine center-to-center and end-to-end lengths for parallel offsets.
- 5.2.2 Calculate the travel for a rolling offset.
- 5.2.3 Solve for end-to-end lengths of pipe.
- 5.2.4 Calculate area, water volumes, weights, and gallons for various geometric shapes.
- 5.2.5 Explain pressure measurement in terms of Pounds per Square Inch (PSI) and inches of mercury.
- 5.2.6 Perform angular, length, and converted temperature measure calculations.
- 5.2.7 Calculate material expansion and/or volume related to heat.

CONTENT STANDARD 6.0: THE UNIFORM PLUMBING CODE (UPC)

Performance Standard 6.1: The Uniform Plumbing Code (UPC)

- 6.1.1 Identify proper code terminology.
- 6.1.2 Identify general plumbing requirements for hanging and securing piping.
- 6.1.3 Identify plumbing fixtures.
- 6.1.4 Perform water heater sizing, combustion air calculations, vent sizing, and installation.
- 6.1.5 Perform water pipe sizing calculations.
- 6.1.6 Explain when and what type of backflow prevention devices, assemblies, and methods are required.
- 6.1.7 Perform drain and waste pipe sizing calculations.
- 6.1.8 Perform indirect waste installation and usage.
- 6.1.9 Describe venting systems (horizontal, vertical wet venting, etc.).
- 6.1.10 Identify proper use of traps and interceptors.
- 6.1.11 Perform proper storm drain sizing and calculations.
- 6.1.12 Perform fuel gas sizing calculations.
- 6.1.13 Identify proper fire-stop installation.
- 6.1.14 Identify the proper use of gray water, reclaimed water, and rainwater systems.
- 6.1.15 Utilize appendices and reference standards.
- 6.1.16 Apply IDAPA Plumbing rules and statutes (Title 54).

CONTENT STANDARD 7.0: CONSTRUCTION DOCUMENTS

Performance Standard 7.1: Isometric Drawings

- 7.1.1 Identify the various plumbing symbols and abbreviations.
- 7.1.2 Complete an isometric drawing with proper symbols.
- 7.1.3 Develop materials list based on isometric drawings.

Performance Standard 7.2: Plan Reading

- 7.2.1 Describe basic plumbing symbols, abbreviations, and specifications.
- 7.2.2 Explain how the specifications relate to the plan.
- 7.2.3 Identify the necessary requirements and locations to install the plumbing fixtures and plumbing appurtenances.
- 7.2.4 Describe the coordination of trades on the job site.
- 7.2.5 Recognize site plan, floor plans, elevations, sectional views, details, and schedules.
- 7.2.6 Locate specific information on building plans.

PLUMBING APPRENTICESHIP PROGRAM STANDARDS

2018

CONTENT STANDARD 8.0: ADA GUIDELINES

Performance Standard 8.1: ADA Guidelines

- 8.1.1 Identify the necessary requirements according to ADA standards.

CONTENT STANDARD 9.0: KNOWLEDGE OF RELATED INDUSTRIES

Performance Standard 9.1: Knowledge of Related Industries

- 9.1.1 Explain how to use alternating-current meters and instruments in the pipe trades.
- 9.1.2 Apply basic building codes.

CONTENT STANDARD 10.0: CUT AND JOIN PIPES

Performance Standard 10.1: Cut and Join Pipes

- 10.1.1 Join different types of pipes (including PVC, galvanized, steel, plastic, copper, and cast-iron pipes).
- 10.1.2 Measure, mark, and cut different types of pipes using various pipe cutters.
- 10.1.3 Thread a steel pipe with a power-driven vise stand or a pipe-threading machine.

CONTENT STANDARD 11.0: MAINTENANCE AND REPAIR

Performance Standard 11.1: Maintenance and Repair

- 11.1.1 Diagnose water heater problems (e.g. gas, electric, tankless).
- 11.1.2 Identify repairs for residential fixtures.
- 11.1.3 Identify repairs for commercial fixtures.

PLANNING, POLICY AND GOVERNMENTAL AFFAIRS
AUGUST 29, 2019

SUBJECT

Proposed Rule Docket 08-0203-1902, Rules Governing Thoroughness, Data Collection

REFERENCE

August 2017	Board approved proposed rule adding GPA to the state longitudinal data system.
November 2017	Board approved pending rule adding GPA.

APPLICABLE STATUTE, RULE, OR POLICY

Sections 33-133 and 33-1626, Idaho Code
Idaho Administrative Code, IDAPA 08.02.03, Rules Governing Thoroughness, subsection 115 Data Collection

ALIGNMENT WITH STRATEGIC PLAN

Goal 1: Educational Attainment; Objective A: Data Access and Transparency

BACKGROUND/DISCUSSION

Pursuant to Section 33-133, Idaho Code, the state “data system” is made up of the state’s elementary, secondary and postsecondary longitudinal data system, additionally any new “personally identifiable student data” added to the data system must be approved by the Governor and the legislature. New data points may be added on a provisional basis, however, to remain in the system as an ongoing data element the data element must be approved. Approval is accomplished through the administrative rule making process. Section 33-133, Idaho Code requires“(2) the Idaho State Board of Education must submit any new provisional student data collection to the governor and the legislature for their approval within one (1) year in order to make the new student data a permanent requirement through the administrative rule process...”

School districts and charter schools have been required to report to the US Department of Education data on student absenteeism. This last year US Department of Education changed the process for reporting this data and now request it be reported through the state reporting mechanism. This data was reported through Department in 2018, in order to continue to meet the federal reporting requirement for chronic absenteeism this data element needs to be added through the administrative rule process to IDAPA 08.02.03.

IMPACT

Should the pending rule be approved by the Board and accepted by the legislature it will add chronic absenteeism as an ongoing data element in the state longitudinal data system.

ATTACHMENTS

Attachment 1 – Proposed Rule Docket 08-0203-1902

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STAFF COMMENTS AND RECOMMENDATIONS

This is a data element that has been historically reported directly by school districts and charter schools to the US Department of Education. Addition of the element to the state longitudinal data system does not create a new reporting requirement for school districts and charter schools. The data element is now reported to the Department of Education in conjunction with other state reporting data reporting requirements.

Once approved by the Board, the proposed rule will be published in the administrative bulletin and a 21-day public comment period commences. Unlike the negotiated rulemaking meetings the public comment period only requires the public be given an opportunity to comment on what has already been drafted. Formal public hearings may also be conducted as part of the 21-day comment period. Public hearings provide a forum for the public to give input and are not generally conducted in a manner that allows for discussion of the rule changes being proposed. Following the close of the public comment period, changes may be made to the proposed rule in response to the comments received. The rule is then brought back to the Board with changes if applicable, as a pending rule. If the pending rule is approved by the Board it is published in the Administrative Bulletin and forwarded to the Legislature for consideration.

Staff recommends approval.

BOARD ACTION

I move to approve proposed rule Docket 08-0203-1902, as submitted in Attachment 1.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

IDAPA 08
TITLE 02
CHAPTER 03

08.02.03 – RULES GOVERNING THOROUGHNESS

(BREAK IN CONTINUITY OF SECTIONS)

115. DATA COLLECTION.

The State Department of Education will collect the required information from participating school files for state and federal reporting and decision-making. The enrollment collection will contain information about the enrollment of the student attributes such as unique student identifier, active special education, Limited English Proficient (LEP), migrant, grade level, gender, race, and free/reduced lunch status. The collection will be done in ~~mid-October, early February, and May (end of the testing window)~~ in accordance with the reporting requirements established in chapter 10, Title 33 or as needed for state and federal accountability purposes. Each participating school is required to verify and assure the accuracy of the data submitted in the files. (5-8-09)

01. State Data System. In accordance with the provisions of Section 33-133, Idaho Code, the following data elements will be added to the state data system: (3-28-18)

a. Grade Point Average (GPA). (3-28-18)

b. Chronic Absenteeism ()

(BREAK IN CONTINUITY OF SECTIONS)

PLANNING, POLICY AND GOVERNMENTAL AFFAIRS
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SUBJECT

Proposed Rule – Docket No. 08-0204-1901, Rules Governing Public Charter Schools

APPLICABLE STATUTE, RULE, OR POLICY

Idaho Administrative Code, IDAPA 08.02.04, Rules Governing Public Charter Schools
Chapter 52, Title 33, Idaho Code

ALIGNMENT WITH STRATEGIC PLAN

Goal 3: Educational Attainment; Objective C: Access

BACKGROUND/DISCUSSION

Pursuant to Section 33-5207, Idaho Code, the charter school authorizing entity is required to review the performance certificate and take affirmative action to renew a charter school's charter. We had one instance where a school district did not review a charter schools performance certificate this last year prior to the expiration of the charter. While the situation was rectified and the charter school in question was renewed, the situation identified the need to provide clarifying language on the status of the charter school if this should happen in the future.

This rule will add language to the charter renewal and performance certificate review process to clarify that a charter school who has met all of its performance certificate targets will be provisionally renewed until such time as the chartering entity can take action. This will provide stability for the charter school while they are waiting for the chartering entity to take action.

IMPACT

The proposed rule will provide clarification to charter schools on what their status is while they are waiting for authorizer renewal.

ATTACHMENTS

Attachment 1 – Proposed Rule Docket No. 08-0204-1901

STAFF COMMENTS AND RECOMMENDATIONS

Administrative rules are made up of three types of rules, temporary rules, proposed rules and pending rules. Temporary and proposed rules may be promulgated jointly with a single docket number or temporary rules may be promulgated as a standalone rule. The Notice of Intent to Promulgate Rules was published in the July 6, 2019 (Vol 19-7) Idaho Administrative Rules Bulletin.

Proposed rules approved by the Board are published in the Idaho Administrative Rules Bulletin. Following publication there is a 21 day comment period. Based on received comments and Board direction, changes may be made to proposed rules prior to entering the pending stage. Pending rules are then brought back to the Board for consideration. Once approved, pending rules will be submitted to the

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Department of Administration for publication in the Idaho Administrative Rules Bulletin and are then forwarded to the legislature for consideration. Pending rules become effective at the end of the legislative session in which they are submitted, if they are not rejected by the Legislature.

Staff recommends approval.

BOARD ACTION

I move to approve proposed rule – Docket No. 08-0204-1901, as submitted in Attachment 1.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

IDAPA 08
TITLE 02
CHAPTER 04

08.02.04 – RULES GOVERNING PUBLIC CHARTER SCHOOLS

(BREAK IN CONTINUITY OF SECTIONS)

301. AUTHORIZED CHARTERING ENTITY RESPONSIBILITIES.

01. Monitoring. Notwithstanding Section 300 of these rules, the authorized chartering entity of a public charter school shall be responsible for monitoring the public charter school's operations in accordance with all of the terms and conditions of the performance certificate. (3-20-14)

02. Performance Certificate Review. Pursuant to Section 33-5209B, Idaho Code, an authorized chartering entity may renew or nonrenew a charter for a term of five (5) years following the initial three (3) year term. Should a chartering entity take no action to renew or nonrenew the charter, and the charter schools has met all of the existing performance certificate targets, the charter school shall be provisionally renewed until such time as the chartering entity takes action. The five (5) year term of the renewed charter shall be based on the provisional renewal date.

(BREAK IN CONTINUITY OF SECTIONS)

**PLANNING, POLICY AND GOVERNMENTAL AFFAIRS
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DIVISION OF CAREER TECHNICAL EDUCATION (DIVISION)

SUBJECT

Proposed Rule 55-0103-1901 – Rules of Career Technical Schools, First Reading

REFERENCE

2001	Board approved Administrative Rules, creating IDAPA 55.01.03 – Rules of Career Technical Schools
August 2018	Board approved proposed rule docket 55-0103-1801, amending the added cost funding for Career Technical Schools, moving from a Support Unit based formula to a student enrollment based formula.
November 8, 2018	Board rejected pending rule docket 55-0103-1801 based on stakeholder input and requested the Division do additional work in communicating with stakeholders and generating buy-in for the changes in the funding distribution formula.

APPLICABLE STATUTE, RULE, OR POLICY

Section 33-1002G, Idaho Code
Idaho Administrative Code, IDAPA 55.01.03

ALIGNMENT WITH STRATEGIC PLAN

GOAL 1: EDUCATIONAL SYSTEM ALIGNMENT – Objective B: Alignment and coordination

BACKGROUND/DISCUSSION

Proposed amendments to IDAPA 55.01.03 reflect updates to Idaho Code 33-1002G, which provides the funding framework for career technical schools. During the 2018 legislative session, this section of Idaho code was updated to eliminate the link to salary-based apportionment and support units allowing the Board the flexibility to explore other methodologies for distributing funds appropriated for career technical schools. The Division entered into Negotiated Rulemaking in July 2018, working with career technical school administrators to develop a framework to fund career technical schools using an enrollment-based model. The rule was then vacated due to feedback from education stakeholders and concerns about stakeholder involvement. The updated proposed rule reflects a several month process of engagement and dialogues, with career technical school administrators taking on a primary role in the development of the new formula.

The amendments will clarify the process for calculating and distributing funds to career technical schools. An enrollment based approach more closely aligns with how the infrastructure and costs for these programs are calculated and reduces the reporting burden for school administrators.

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IMPACT

The policy will provide a clearer understanding of program expectations from year to year, as well as clarifying which courses are eligible to receive funding. There will be no additional immediate fiscal impact, as these changes simply clarify the distribution of funds within any given appropriation. Long term fiscal impact will be determined as the number of students enrolling in a career technical school increases and/or the number of funded schools increases.

ATTACHMENTS

Attachment 1 – Proposed Rule – Docket 55-0103-1901

STAFF COMMENTS AND RECOMMENDATIONS

Schools meeting certain eligibility criteria may be designated as “career technical schools” and receive added cost funding to support the added cost of high-quality career technical programs. Career technical school funding is currently based on student average daily attendance and support units. Due to the cost of specific equipment needs for career technical education programs, an enrollment-based model would be more appropriate for career technical schools. Section 33-1002G, Idaho Code was amended during the 2018 Legislative Session to allow the Board to explore moving to an enrollment-based funding model. The proposed amendments would move career technical school funding from a model based on student average daily attendance and support units to one based on the number of students enrolled in a capstone course during the previous academic year, the aggregate total number of students completing a technical skills assessment for the program in which the student was enrolled, and the total credit hours reported by each school for intermediate, capstone, and work-based learning courses. Additional amendments to IDAPA 55.01.03 add defined terms and create a hold harmless provision for existing programs (IDAPA 55.01.03.107). Through the defined terms “Field Experience” and “Work-based Learning Course,” the Division has created a requirement that all career technical schools include a face-to-face or in-person component. Field Experience is a term that would no longer be used in IDAPA 55.01.03, however, it is an undefined term used in Section 33-1002G, Idaho Code, as a requirement for all career technical schools. By defining the term in Administrative Code, the Board would be requiring all career technical schools have a face-to-face or in-person component. Additionally, requiring a work-based learning course to include an in-person, face-to-face component will eliminate the ability of schools to use enrollment in a virtual work-based learning for the purpose of calculated added cost unit funding eligibility. At the June 2019 Regular Board meeting, the Board requested the Division evaluate which career technical programs could be delivered virtually and still meet the Board approved program standards. Creating a face-to-face requirement for all career technical schools is contrary to the direction the Board gave the Division of Career Technical education.

Should this rule complete the proposed and pending stages of negotiated rulemaking and be considered by the legislature in 2020, it would go into effect at

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the end of the legislative session in 2020. The hold harmless provision included in the rule would not take effect until the end of the school year after the funding has already been distributed for that year. Any proposed hold harmless provisions need to be based on the fiscal year after the rule goes into effect and must be written in a way that would not result in requiring the Division to distribute more funds than may be appropriated for career technical schools in a given year.

The notice of intent to promulgate this rule was published in the July 3, 2019 (Vol.18-7) Administrative Bulletin. Proposed rules approved by the Board are published in the Idaho Administrative Rules Bulletin. Following publication, there is a 21-day comment period. Based on received comments and Board direction, changes may be made to proposed rules prior to entering the pending stage. Pending rules are then brought back to the Board for consideration. Once approved, pending rules will be submitted to the Department of Administration for publication in the Idaho Administrative Rules Bulletin and are then forwarded to the Legislature for consideration. Pending rules become effective at the end of the legislative session in which they are submitted if they are not rejected by the Legislature.

Staff recommends the in-person and face-to-face requirements be removed and the hold harmless provision be corrected prior to Board approval.

BOARD ACTION

I move to approve proposed rule Docket 55-0103-1901 as submitted in attachment 1.

Moved by _____ Seconded by _____ Carried Yes _____ No _____

IDAPA 55
TITLE 01
CHAPTER 03

55.01.03 – RULES OF CAREER TECHNICAL SCHOOLS

000. LEGAL AUTHORITY.

The State Board of Education is designated as the State Board for Career Technical Education and is responsible to execute the laws of the state of Idaho relative to career technical education, administer state and federal funds, and through the administrator of the State Division of Career Technical Education, coordinate all efforts in career technical education (Section 33-2202 through 33-2212, Idaho Code). (3-30-01)

001. TITLE AND SCOPE.

01. Title. The rules shall be cited as IDAPA 55.01.03, “Rules of Career Technical Schools.” (3-30-01)

02. Scope. These rules serve the administration of Career Technical Education in Idaho and define the duties of the State Division of Career Technical Education. (3-30-01)

002. WRITTEN INTERPRETATIONS.

Written interpretations of these rules, if any, are on file at the office of the State Division of Career Technical Education. (3-30-01)

003. ADMINISTRATIVE APPEALS.

All appeals under these rules shall be conducted pursuant to the procedures set forth by the State Board of Career Technical Education. (3-30-01)

004. (RESERVED)

005. DEFINITIONS.

01. Administrator. A designated school administrator, holding a career technical administrator certificate pursuant to IDAPA 08.02.02, “Rules Governing Uniformity,” Section 015, and who oversees and monitors the career technical school programs and is responsible for ensuring the school meets all applicable federal, state, and local school district regulations, rules, and policies. (3-28-18)

~~**02. Attendance Zones.** For purposes of Section 33-1002G, Idaho Code, each high school is classified as an attendance zone. The attendance zone requirement can be met by having students from at least two (2) high school zones within a district or at least two (2) high school zones in different districts participate in the career technical school. A minimum of fifteen percent (15%) of the total student body must reside in attendance zones apart from the attendance zone of the majority of students. Cooperative Service Agencies must meet the fifteen percent (15%) attendance criteria on a program by program basis. (3-30-01)~~

~~**0302. Capstone Course.** A culminating course that requires students to demonstrate the knowledge and skills learned throughout their program of study. (3-28-18)~~

~~**0403. Career Technical Schools.** Schools designed to provide high-end, state-of-the-art technical programs that foster quality technical education through intermediate and capstone courses. Programs and services are directly related to the preparation of high school students for employment in current or emerging occupations that require other than a baccalaureate or advanced degree. These schools are closely linked to postsecondary education,~~

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thereby avoiding redundancy and maintaining rigor. They are also closely linked to current business and industry standards to ensure relevance and quality. (3-28-18)

04. Concentrator Student. A Junior or Senior enrolled in the capstone course.

05. Credit Hours. The total number of enrolled credit hours reported to the State Department of Education for qualifying intermediate, capstone, and work-based learning courses.

06. EDUID. Education Unique Identifier.

07. Enrollment Units. The total number of individual EDUIDs that are reported as enrolled during the previous academic year in a qualifying capstone course, as determined by the division.

08. Field Experience. Paid or unpaid work experience such as business/industry internship, clinical experience, supervised occupational experience, job placement, school-based enterprise, or similar work experience setting. The field experience must have an in-person, face-to-face component and must be of sufficient duration and depth to add to the technical competencies of the student. (3-30-01)

09. Intermediate Course. A course beyond the introductory level that adds to the technical competencies of pathway students, is intended to serve as a prerequisite for a capstone course, and is offered in grades 9 through 12.

10. Participation Total. The total number of technical skills assessments taken by enrolled concentrator students as part of each required capstone course during the previous academic year.

11. Technical Skill Assessment. An assessment given at the culmination of a pathway program during the capstone course and measures a student's understanding of the technical requirements of the occupational pathway.

12. Work-based Learning Course. A paid or unpaid, internship, clinical, or apprenticeship that is delivered as part of a Career Technical School program of study. This course, which must include an in-person, face-to-face component, is delivered in conjunction with or after completion of a capstone course. Work-based learning courses must be tied to the program of study, and must be formalized through a written agreement between the school, industry partner, parent, and student.

~~006~~12. -- 099. (RESERVED)

100. STATEMENT OF PURPOSE.

The purpose of this rule is to clearly define general implementation criteria, the criteria for approval for funding, the added cost unit calculation, the procedure to follow in calculating average daily attendance (ADA), enrollment-based funding calculation, the process to follow for fund distribution, and program accountability for Idaho Career Technical Schools. (3-30-01)

~~101. CAREER TECHNICAL SCHOOL GENERAL APPROVAL CRITERIA.~~

~~For approval, applying career technical school's district must meet at least four (4) of the five (5) criteria listed in Section 33-1002G, Idaho Code. Approval criteria:~~ (3-28-18)

~~01. High School Attendance Zones.~~ Two (2) or more high school attendance zones. (3-30-01)

~~02. Dual Credit.~~ (3-30-01)

~~03. Field Experience.~~ (3-30-01)

~~04. Funded as a Separate School.~~ (3-30-01)

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~~05. Separate Site or Cooperative Service Agency. Located at a separate site or approved by the State Board of Education as a cooperative service agency. (3-30-01)~~

102. CAREER TECHNICAL COMPONENT CRITERIA.

01. Program Criteria. Career technical schools are intended to deliver high-end technical education programs that go beyond the scope of traditional career technical education. The lab should be appropriately designed for the type of program and the number of students enrolled. The program should have state-of-the-art equipment, current technology and strong links to business and industry. (3-30-01)

02. Career Technical School Program. Each program of a career technical school shall: (3-30-01)

a. Deliver a sequence of career technical education courses that culminate in a capstone course. (3-28-18)

b. Meet all of the required technical competency credit standards established by the state board of education. (3-28-18)

c. Develop and maintain business and industry partnerships in addition to the technical advisory committee. (3-28-18)

d. ~~Implement instructional delivery methods that integrate advances in industry technologies.~~ Integrate industry-specific state-of-the-art equipment and technologies into classroom instruction and applied learning opportunities for students. (3-28-18)

e. Employ instructors who hold career technical certification to teach the occupation and who also hold a related industry-based credential, or equivalent credential, as approved by the ~~d~~Division of ~~e~~Career ~~f~~Technical ~~e~~Education. (3-28-18)

f. Be delivered over a term of not less than five (5) semesters, or the equivalent instructional hours. Semester and trimester equivalencies will be approved by the ~~d~~Division of ~~e~~Career ~~f~~Technical ~~e~~Education. (3-28-18)

g. Enroll students from at least two (2) high schools. No single high school will comprise more than eighty-five percent (85%) of the total enrolled career technical school students. In the event a student enrolled in the career technical school is not enrolled in a high school, that student will be reported separately, based on the high school attendance zone where the student resides. (3-28-18)

h. Promote the development of leadership. (3-28-18)

103. APPLICATION PROCESS.

New and renewal ~~A~~applications for career technical school funding must be received by the Division of Career Technical Education on or before the ~~first Friday in July~~ fifteenth of April for the following fiscal year. (3-30-01)

104. CAREER TECHNICAL SCHOOL ADDED COST UNIT FUNDING AND ELIGIBILITY.

Section 33-1002G, Idaho Code, provides school districts an opportunity to establish career technical schools that qualify for funding appropriated for the specific purpose of supporting the added cost of career technical schools. The funds are appropriated to the State Board for Career Technical Education to be expended by the Division of Career Technical Education. Funding is based on the ~~_average daily attendance (ADA) of students enrolled in the career technical school~~ number of students enrolled in a capstone course during the previous academic year, the aggregate total of the students who completed the technical skill assessment for the program the student was enrolled in, and the total credit hours reported by each school for intermediate, capstone, and work-based learning courses. If any approved program within a career technical school does not enroll students from more than one (1) high school during the ~~reporting period, the enrolled students may not be counted as part of the school's average daily attendance for that~~

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~~reporting period~~ previous academic year, the program will not be included in the current year funding calculation. If the overall school enrollment exceeds more than eighty-five percent (85%) of students from any single high school during the previous school year, the ~~d~~Division of ~~e~~Career ~~t~~Technical ~~e~~Education may withhold all or part of the career technical school's funding. (3-28-18)

105. CAREER TECHNICAL SCHOOL ~~AVERAGE DAILY ATTENDANCE~~FUNDING CALCULATION.

~~The Division of Career Technical Education shall use the enrollment and attendance submitted to the division of career technical education by the school district to calculate career technical school average daily attendance (ADA) in accordance with applicable laws and rules (Section 33-1002, Idaho Code) Students in attendance at a qualifying career technical school shall be reported as aggregate hours and/or aggregate attendance. The aggregate hours and aggregate attendance will be combined to calculate the ADA for the career technical scho~~The distribution of individual career technical school funding shall be calculated as a portion of the annual appropriation based on the following criteria: 50 percent (50%) of the annual appropriation will be divided among the total enrollment units, 25 percent (25%) will be divided by the total participation, and 25 percent (25%) will be divided among the total cumulative credit hours. Qualifying pathway enrollment shall be reported to the Department of Education. The Division of Career Technical Education shall gather aggregate participation total data from the independent technical skill assessment providers annually. (3-28-18)

~~01. Aggregate Hours. The daily hours of all students enrolled in approved intermediate and capstone courses who attend less than two and one half (2.5) hours per day shall be added together and reported as weekly aggregate hours.~~ (3-28-18)

~~02. Aggregate Attendance. Students enrolled in approved intermediate and capstone courses who attend more than two and one half (2.5) hours per day are to be reported as aggregate attendance.~~ (3-28-18)

106. ~~CAREER TECHNICAL SCHOOL ADDED COST UNIT~~ CALCULATION.

~~The Division of Career Technical Education shall use the career technical school average daily attendance (ADA) as the basis for added cost unit funding.~~ (3-30-01)

~~01. State Support Unit Value. The added cost support unit value shall be based on state salary based apportionment, state paid employee benefits (less state unemployment), base support, and safe environment distribution factors found in the Public School Support Program.~~ (3-30-01)

~~02. Support Unit Divisor. Added cost support units for career technical schools shall be calculated by using the secondary support unit attendance divisor of eighteen and one half (18.5) as shown in Section 33-1002(6), Idaho Code.~~ (3-30-01)

~~03. Added Cost Support Factor. The added cost support factor for career technical schools shall be calculated by multiplying point thirty-three (.33) times the added cost support units generated in the career technical school.~~ (3-30-01)

~~04. Estimated Distribution. The estimated distribution shall be calculated by multiplying the state support unit value by the added cost support factor.~~ (3-28-18)

107. CAREER TECHNICAL SCHOOL ~~ADDED COST~~ UNIT FUND DISTRIBUTION.

Once the career technical appropriation is made, the per unit value will be determined by dividing the total units into the appropriation. The value of each unit may vary from year to year, depending on the total appropriation and the total number of units in each of the enrollment categories. To reduce significant negative shifts in funding as a result of the new funding distribution model, 2019-2020 Career Technical School funding will be guaranteed to be no less than 90 percent of 2018-2019 allocation for a qualifying career technical school.

(3-30-01)

01. Payment Distribution. Added cost support unit funds shall be distributed by the Division of Career Technical Education in two (2) payments: (3-30-01)

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a. Seventy percent (70%) of the total ~~estimated~~appropriated funds for which career technical schools are eligible shall be distributed no later than September 30 each year ~~following receipt of first period attendance data from the approved career technical schools~~. Funding will not be distributed until ~~reports have been received and approved by the division of career technical education from each approved schools~~the previous year enrollment units and the Division of Career Technical Education has verified aggregate participation total data. (3-28-18)

b. ~~Based on actual support units generated during the year, the balance shall be distributed each year by July 15th~~The remaining funds shall be distributed no later than June 30. (3-30-01)

108. ACCOUNTABILITY.

01. Assessment Process. The Division of Career Technical Education shall develop an assessment process that includes measures and standards for career technical school programs. (3-30-01)

02. Reporting. No later than October 15 of each year, career technical schools will submit a report to the ~~e~~Division of ~~e~~Career ~~t~~Technical ~~e~~Education, detailing their enrollment at the program level by high school. (3-28-18)

03. Administrator Responsibility. The administrator of each career technical school shall be responsible to provide onsite administration of the career technical school. The administrator will submit all required career technical school reports requested by the ~~e~~Division of ~~e~~Career ~~t~~Technical ~~e~~Education. (3-28-18)

04. Accreditation. Each career technical school shall be accredited following Department of Education guidelines. This accreditation shall be appropriate for the individual type of career technical school that is developed. (3-30-01)

05. School Improvement Plan. The administration, faculty and staff at each career technical school shall be responsible to develop and implement a local school improvement plan based on the assessment process developed by the ~~e~~Division of ~~e~~Career ~~t~~Technical ~~e~~Education. (3-28-18)

109. -- 999. (RESERVED)