WORKFORCE and ECONOMIC DEVELOPMENT

GUIDELINES

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CTIMS / IMD SUPPORT SERVICES and RESOURCES

CTIMS Main Web Page

WED (BIS) and ACD Technical Guidebook (WED (BIS) Data Requirements/Course, Student Record Layout)

Economic Development Initiatives

> EDI Process Guidebook for Technology Center Users
>
> Change Request Process Guidebook
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> Budget Adjustment Process Guidebook
>
> Invoice Process Guidebook
>
> TIP Process Video
>
> OCAS Codes for WED (BIS)

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WORKFORCE and ECONOMIC DEVELOPMENT (BIS) PROGRAMS and ECONOMIC DEVELOPMENT INITIATIVES

PROGRAMS

Apprenticeship

Adult and Career Development (ACD)

Truck Driver Training

Safety for Government Entities or Safety for Industry

Customized Industry Training or Government Training

Client-Based Consulting Services (SBM/SET/BES/ABM)

ECONOMIC DEVELOPMENT INITIATIVES (EDI)

Training for Industry Growth (TIG)

Training for Industry Program (TIP)

Firefighter Training (FFT)

Safety Training Grants

Incubator Grants

Oklahoma Procurement Technical Assistance Center (OkPTAC)

ACRONYMS AND DEFINITIONS

ACD   Adult and Career Development
ABM   Agri-Business Management
BES   Business and Entrepreneurial Services
BIS   Business and Industry Services
CST   Customized and Safety Training
CTIMS   CareerTech Information Management System
DLA   Defense Logistics Agency
DOD   Department of Defense
EDI   Economic Development Initiatives
EPCS   Education Partnerships and Customized Services
ESL   English as Second Language
FFT   Firefighter Training
FQ   Fiscal Quarter
FTE   Full-Time Equivalent
GED   General Education Development
IMD   Information Management Division (ODCTE)
OkPTAC   Oklahoma Procurement Technical Assistance Center
ODCTE   Oklahoma Department of Career and Technology Education
OJT   On-the-Job Training
OLT   Online Training
OMES   Office of Management and Enterprise Services
OSDH   Oklahoma State Department of Health
NAICS   North American Industry Classification System
PEF   Program Enrollment Form
PID   Position Identification
PTAC   Procurement Technical Assistance Center
RC   Regional Coordinator
RTI   Related Technical Instruction
SAS   Local Student Accounting System
SBM   Small Business Management
SET   Self-Employment Training
SOU   Statement of Understanding
TIG   Training for Industry Growth
TIP   Training for Industry Program
VC   Virtual Class
WED   Workforce & Economic Development

Contact Hours - <u>Number of Enrollments</u> multiplied by <u>Number of Class/Course Hours</u>
For example, a 4-hour class with 20 students would equal 80 Contact Hours (20 x 4=80). An 8-hour class taught over 4 days for 20 students would equal ((8 x 4) x 20 = 640 Contact Hours)

Customized and Safety Training (CST) Formula Funding - Based on the availability of state funding, CST Formula Funding is allocated at the beginning of each fiscal year to each Technology Center.

99999 – Business Code for enrollments, when training or consulting is not industry sponsored.

GENERAL INFORMATION

The Business and Industry Services/Economic and Workforce Development Guidelines are intended to define how the Oklahoma Department of Career and Technology Education (ODCTE) will exercise stewardship of taxpayer dollars through **Customized and Safety Training (CST) Formula** funding, and Economic Development Initiatives (EDI) funding and specific program funding. These funds are administered by the **Workforce and Economic Development (WED)** division of ODCTE. Oversight is provided by ODCTE administration. Specific questions regarding funding or processes defined in these guidelines may be directed to the appropriate Regional Coordinator. See *Contacts* for Regional Coordinator information.

FUNDING:

Funding comes from various sources and may result in the inclusion of specific requirements and/or limitations based on the source of funding allocated. Participation in training initiatives using these funding sources is determined by the local technology center in collaboration with the WED division. Sound business principles and statewide economic impact will be considered when determining the scope of each project funded.

Funding is intended to support, not replace, costs incurred by a technology center in offering classes and training services for businesses in the district. The circumstances surrounding a given class offering or training is a matter of local determination.

Based on availability, funding is provided for:
- Apprenticeships
- Safety for Government Entities <u>or</u> Safety for Industry
- Tribal Business Entities
- Customized Industry Training
- Workforce Development (TIP and TIG)
- Incubator Grants
- Safety Grants
- Volunteer Firefighter Training
- Oklahoma Procurement Technical Assistance Center (OkPTAC)

Refer to the Program Type sections for specific guidelines regarding funding eligibility. Participation in training initiatives using these funding sources is determined by the local technology center and the WED Division.

Technology centers are encouraged to analyze the training needs of industries within their districts and design training programs for those companies that have the greatest ability to benefit. Technology centers may be encouraged to pool resources for larger projects and for industries that are served by more than one technology center district. **Items that technology centers <u>may include</u> in funding agreements are:**
- Instructor salaries
- Training related equipment
- Curriculum development (up to 2% of total training request not including consumables, supplies, books)
- Instructional supplies

Funds may <u>not</u> be used for indirect costs, building construction, remodeling or leasing of facilities. See Page 3 for non-reimbursable training activities.

CUSTOMIZED AND SAFETY TRAINING FORMULA FUNDING and PAYMENTS

Customized and Safety Training Formula Funding Payment Process

At the beginning of each fiscal year, and based on available funds, the agency provides each tech center with their fiscal year allocation which is calculated using the **Customized and Safety Training Formula** (see below).

The Customized and Safety Training (CST) Formula Funding line item will be paid to the school in 12 equal monthly payments at the same time operations payments are made. Total annual payments to each tech center will not exceed their annual fiscal year allocation.

        a. Tech center receives payment and records using the revenue codes listed below:
- i. Type 01 – OCAS Type 31 - OCAS Project code 433, Revenue code 3833
- ii. Type 21 - OCAS Project code 448, Revenue code 3848
- iii. Type 31 - OCAS Project code 433, Revenue code 3833

Customized & Safety Training Funding Formula Calculations

1) Technology center conducts training and submits required documentation to ODCTE.

2) The Information Management Division (IMD) at ODCTE reviews the enrollment data submitted. **To calculate eligible contact hours for use in the funding formula, the following criteria must be met**:

    a. Program **Type 31** (Customized Industry Training) Criteria:
- i. Students submitted with an industry NAICS* code NAICS Codes will be counted EXCEPT for those employed by a state government, federal government, tribal government, education entity or those coded as open enrollment (99999). Tribal business entities such as casinos, stores, hotels and childcare facilities will be included.

    b. Program **Type 21** (Safety for Government Entities or Safety for Industry) Criteria:
- i. All courses that meet the program Type 21 definition will be included. This will include government, tribal government and educational entities. Those courses not meeting the program Type 21 definition may be submitted as a program Type 31 (if they meet Type 31 Criteria above). The only exclusions in this category will be for those students coded as open enrollment (99999).

    c. Program **Type 15** (ACD Training) Criteria:
- i. **Classes must contain a stated career objective in course syllabus to be eligible for Type 15.**
- ii. Students submitted with an industry NAICS code NAICS Codes will be counted EXCEPT for those employed by a state government, federal government, tribal government, education entity or those coded as open enrollment (99999). Tribal business entities such as casinos, stores, hotels and childcare facilities will be included. Payment for eligible contact hours in program type 15 will be included with program type 31, if the following criteria is met:
  - a) If the majority (50% or more) of the students in an ACD class have an eligible employer reported to their student record - the entire class should be reported as a Type 31. Students do not all have to be sponsored by the same employer. Eligible employer means the student is employed by the business and the class or training is job-related.
- iii. ACD classes conducted in a technology center district by another technology center are eligible for formula funding if approved by the technology center assigned to that district.

d. Program **Type 01** (Apprenticeship) Criteria
   Effective FY21, Apprenticeship Type 01 is eligible for CST Funding Formula. This program type is used to document a school's support of apprenticeships occurring within an Oklahoma company. The apprenticeships may be registered or unregistered. Schools can receive funding for providing Related Technical Instruction (RTI) in support of the apprenticeship.

   *Link to North American Industry Classification System (NAICS) codes**: NAICS Codes

NON-REIMBURSEABLE ACTVITIES:

Report all personal interest classes as a non-reimbursable type code (60, 61, 62, 75, 78) described on page 23. Below are examples of training activities **not eligible** for reimbursement using any of the WED funding sources:

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

ECONOMIC DEVELOPMENT INITIATIVES (EDI) and GRANT FUNDING

Based upon the availability of funds, participation in training initiatives using EDI funding is determined by the local technology center in collaboration with the WED (Workforce and Economic Development) Division. All qualifying projects <u>must</u> be approved through the appropriate ODCTE state staff to be considered ready to train. The official start date of the project will be reflected in CTIMS. **A Purchase Order (P.O.) issued by ODCTE and entered in CTIMS must be in place before training may begin.** See *CTIMS-EDI Approval Process Overview*, page 28 of Appendix.

Economic Development Initiative (EDI) funding includes:
- Volunteer Firefighter Training (FFT)
- Safety Grants
- Training for Industry Growth (TIG)
- Training for Industry Program (TIP)
- Incubator Grants

TIP and TIG Funding:
EDI funding directed to Training for Industry Growth (TIG) and Training for Industry Program (TIP) projects will be considered for approval on a project-by-project basis. TIP & TIG funding is intended to serve companies who are expanding workforces and export goods and services and/or supply exporters within the following identified ecosystems:
- Manufacturing
- Aerospace and Defense
- Energy
- Transportation and Distribution
- Agriculture and Biosciences
- Information and Financial Service
- Health

Refer to the <u>Program Type</u> sections for specific guidelines regarding funding eligibility.

Method for Distributing Funds:
Projects will be considered for approval on a project-by-project basis, based on the availability of funds.

TIG and TIP: Projects will be funded based on a scoring process utilizing the Return on Investment (ROI) calculator to generate a score. Those proposals with the most ROI will have priority in funding. A cut score could keep a TIP or TIG project from being eligible for funding.

Deadlines for EDI (TIP, TIG) & Grant (Safety, Incubator): Once funds are designated for a specific project, the following timeline must be followed:
1. Upon allocation of EDI or Grant funds to a technology center, an agreement must be initiated in CTIMS, by the Technology Center Representative or Coordinator, <u>within fifteen (15) business days</u>.
2. **Training must begin <u>within sixty (60) calendar days</u> of the purchase order being entered into CTIMS.** <u>If training does not start within the first sixty days, the allocated funds will be removed.</u>
3. Status of training will be verified by the Regional Coordinator through active invoicing, current program enrollment forms (PEFs), or dated sign-in sheets/rosters.

*Note: Firefighting Training (FFT) funds are allocated at the beginning of the fiscal year and assigned a P.O. in CTIMS. <u>The deadlines, above, are not applicable to FFT funds.</u>

EDI and GRANT APPLICATION PROCESS

Application and reimbursement for EDI projects will be accomplished through the CTIMS system. The Technology Center encumbers all costs of an EDI training project prior to reimbursement. Therefore, the Technology Center must have a Purchase Order (P.O.) – issued by their technology center - prior to making application in CTIMS. **A P.O. issued by ODCTE and entered in CTIMS must be in place before training may begin or purchases made.** See *CTIMS-EDI Approval Process Overview* on page 28 of Appendix.

Technology Centers

1. Technology Center Coordinator will create an EDI Training Budget Proposal. The proposed budget (xlsx file) will provide details outlining *specific* **direct** costs associated with the training. To complete an EDI Training Budget Proposal, go to FY23 EDI Worksheet.xlsx and download an *FY21 Worksheet*. Funds may **not** be used for indirect costs, building construction, remodeling or leasing of facilities.

2. Technology Center (TC) Coordinator will email EDI Budget Proposal (*FY21 Worksheet*) – with required documentation - to appropriate Regional Coordinator for review and approval.
   o **TIG** application – attach *Letters of Commitment* from participating companies
   o **FFT, Safety, Incubator** application – attach Vendor/Provider proposals or price quotes where applicable.
   o **TIP** application – refer to the TIP Process Video for more information.

3. Upon approval by State Supervisor, an allocation will be made in CTIMS. **Technology Center must have its own purchase order in the amount of the allocation, in place prior to submitting an Agreement in CTIMS.**

4. After allocation of funds in CTIMS, the TC Coordinator has 15 business days to create and submit the appropriate worksheet in CTIMS with attached EDI Budget Proposal (.xlsx) and other supporting documentation.
   o Refer to EDI Process Guidebook for Technology Center Users for instructions.

5. Once the worksheet is fully approved, TC Coordinator will initiate and submit an **Agreement** in CTIMS.
   o Refer to EDI Process Guidebook for Technology Center Users for instructions.
6. Upon the final approval of an EDI Agreement, a Statement of Understanding (SOU) between ODCTE and the technology center will be generated in CTIMS. After the SOU is acknowledged and approved in CTIMS by the appropriate technology center and ODCTE staff, a P.O. will be assigned by the ODCTE Finance Division.
   • Regional Coordinator will notify the technology if/when the Agreement is approved.
   • **Training must begin within sixty (60) calendar days of the purchase order being entered into CTIMS.** If training does not start within the first sixty days, the allocated funds will be removed.
   • Status of training will be verified by the Regional Coordinator through active invoicing, current program enrollment forms (PEFs), or dated sign-in sheets/rosters.

A P.O. issued by ODCTE and entered in CTIMS must be in place before training may begin or purchases made. Refer to CTIMS-EDI Approval Process Overview on page 28 of Appendix.

Modifications to Worksheets and Agreements

All proposed project changes must be submitted in CTIMS *__prior to__* beginning the affected training. Change requests must be submitted proactively. Retrospective change requests will be rejected and will result in forfeiture of ODCTE reimbursement.

If project conditions warrant the re-assignment of funds *__before__* the Agreement is fully approved in CTIMS, refer to CTIMS EDI Change Request Guidebook

Once an Agreement is fully approved in CTIMS, only a **Budget Adjustment** may be performed. Budget adjustments should only be performed for:

- The release of funds, if it is evident training will not occur or all allocated funds will not be utilized.
- Reallocation of funds for specific training Budget Line Items.

To make a Budget Adjustment to an Agreement in CTIMS: CTIMS EDI Budget Adjustment Guidebook

All worksheet changes or budget adjustments to agreements, made to EDI projects, must be fully approved in CTIMS prior to beginning the affected training. Refer to CTIMS-EDI Approval Process Overview on page 28 of Appendix.

REPORTING ENROLLMENTS

ALL enrollments - regardless of funding eligibility - should be reported following these guidelines.
Classes and enrollments must have the appropriate Type Code recorded – refer to the appropriate Type Code
for enrollment criteria. Note - **Type 15 (ACD) classes must contain a stated career objective in the course
syllabus to be eligible as a Type 15 class.** Use **99999** – Business Code for enrollments, when training or
consulting is not industry sponsored. See below for reporting non-reimbursable activities.

Classes and enrollments for all classes, trainings and/or seminars conducted, or coordinated, during each
quarter are submitted a minimum of once each quarter. **Quarterly reports are due on the 15th after the
end of the quarter.**

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

*All Data is final on **August 15**
following end of the fiscal year.*

ONLINE TRAINING *(effective FY21)*

All Online Training must be reported with the appropriate Type Code.

Online Training (OLT) must be a minimum of thirty minutes to be reported. Online training that
occurs in less than a half hour increment must be grouped together with similar incremental trainings to
arrive at a reporting level that is at least one-half hour. For instance:

- Two, 11-minute safety trainings and one, 8-minute safety training could be grouped into one, ½
  hour enrollment
- Five, 12-minute trainings could be grouped into a 1-hour enrollment
- Twelve, 20-minute trainings could be grouped into a 4-hour enrollment.
- Two, 11-minute trainings would not be reported because it is less than one half hour.
- Three, 12-minute trainings could be reported as one training because it is more than one half hour.

For simplification, these OLT training sessions may be titled and reported in one of the following broad
categories which are outlined on the WED Star Map:

- Aerospace-OLT
- Agriculture, Food and Natural Resources-OLT
- Architecture and Construction-OLT
- Business Mgmt. and Admin.-OLT
- Entrepreneurship-OLT
- Finance-OLT
- Health Science-OLT
- Hospitality/Tourism-OLT
- Human Services-OLT
- Information Technology-OLT
- Law, Public Safety, Corrections and Security-OLT

- Manufacturing-OLT
- Safety-OLT
- Transportation, Distribution and Logistics-OLT

Refer to the WED Star Map for sub-categories in these headings: WED (BIS) Statewide Programs Guide

These categories are not to be interpreted to replace reporting for half hour or longer training sessions with a specified topic. For example, a 4-hour training on "Developing Leadership Skills" should still be listed by that topic with OLT following or a 6-hour "Microsoft Excel" class should be labeled as such with OLT following the title. For example, *Developing Leadership Skills-OLT* or *Microsoft Excel-OLT*.

Virtual Classes - Training conducted in real time by an instructor via an online platform (Zoom, Teams, GoToMeeting, etc.) should be reported with the appropriate type code and with the class title followed by – VC (Virtual Class).

- Webinars and previously recorded virtual classes delivered as online training shall be reported as OLT.
- Classes that are a blend between OLT and in-person training should be recorded where the majority of the training occurred.

For information about WED Data Requirements, including Course, Student Record Layout, go to: WED (BIS)Technical Guidebook

North American Industry Classification System (NAICS) codes**:** NAICS Codes

REPORTING SMALL BUSINESS PROGRAM CONSULTING OF NON-FUNDED PROGRAMS *(effective FY23)*

Consulting hours provided by coordinators who are ***not*** part of a BES/SBM/SET/ABM program are to be reported under **Type Code 60 – Informal Training. These hours are non-reimbursable** as they are not training related and will not be included in the Customized and Safety Funding Formula.

Use 99999 – Business Code for enrollments, when training or consulting is not industry sponsored.

SOLE PROPRIETORSHIPS *(effective FY23)*

To request a Business Client Code for a Sole Proprietorship – the following information must be provided:
1. Name of Business or Individual
2. Physical Address (cannot be a P.O. Box)
3. Mailing Address
4. NAICS Code

*** NOTE:** Be prepared to provide authentication of doing business: website, social media/e-commerce page*

REPORTING NON-REIMBURSEABLE ACTVITIES

Report all personal interest classes as a non-reimbursable type code (60, 61, 62, 75, 78) described on page 23. Below are examples of training activities **not eligible** for reimbursement using any of the WED funding sources:

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

TIP & TIG FOLLOW-UP INTERVIEWS and DATA COLLECTION

In addition to reporting enrollments under the appropriate Type Code in CTIMS, a follow-up interview is to be conducted with each business served through a TIP or TIG funding agreement at the conclusion of the funding agreement. The information collected will be used to demonstrate accountability to the taxpayers of Oklahoma and quality assurance for our system.

All information provided will remain confidential. The information will be aggregated as part of consolidated reporting of all businesses, industries, agencies and organizations receiving WED/BIS services and will not be presented in any company-identifiable manner without the company's consent. A survey will be provided by the Manager of the Workforce and Economic Development (WED) Division.

INVOICING FOR EDI PROJECT FUNDING REIMBURSEMENT

(TIP, TIG, Firefighter Initiatives and Safety, Incubator Grants)

Technology centers are required to submit all necessary documents as referenced in the **Invoicing Checklist** (page 12), to receive reimbursement from ODCTE <u>no later than the end of the quarter following the expenditure</u> (See Due Dates, below). **Final quarter requests will not be accepted after <u>July 31</u> following the end of the fiscal year.**

Reimbursement for incurred costs included in the approved agreement budget will be processed in CTIMS. For invoicing instructions in CTIMS, go to the **EDI Invoice Process Guidebook** at: <u>CTIMS EDI Invoice Process Guidebook</u>

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

Final quarter requests will not be accepted after July 31st

ODCTE will process all appropriate requests for payment (invoices) within 20 business days. Upon invoice final approval, technology center treasurers will receive payment from the Office of Management and Enterprise Services for direct costs in accordance with the approved application.

EDI PROJECT REIMBURSEMENT
Items that technology centers may include in funding agreements are instructor salaries, training related equipment, curriculum development (*up to 2% of the total TIP training funds, excluding consumables*), and instructional supplies. See **Invoicing Checklist**, page 12, for reimbursement requirements.

Instructional Rates
- Schools are encouraged to use their staff members for training when possible.
- Technology Center Staff
  - Reimbursable up to $40.00/hr ($40 includes FICA).

Required documentation for Instructors:
- If Technology Center Staff rate is $40/hr or under – attach PEF only.
- **If a Company-sponsored Instructor rate is <u>$40/hr or under – attach PEF only</u>.** *(effective FY23)*
- Company-sponsored Instructors, Adjunct Instructors or Third-Party Contract Trainers
  - Reimbursable up to $150/hr (includes FICA)
  - Any specialized training request over $150/hour (regardless of unit type) <u>must be pre-approved</u> with the Regional Coordinator and will require appropriate documentation to be uploaded with the agreement and supported in the comments.
- Safety training included in a TIG or TIP agreement is <u>NOT</u> to be reported as a Type 21.

Consumable Expenses
ODCTE will only <u>reimburse for consumables (for example: books, curriculum, materials), utilized based on the number of students who complete training</u>. The company or the technology center will bear the burden of consumable expenses for students who do not complete training under an EDI agreement.

TIP Projects Only
Reimbursement for company-provided <u>new employee orientation will be reimbursed at a maximum of $100 per new employee.</u>

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

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

INVOICING CHECKLIST

Technology centers are required to submit all necessary documents to receive reimbursement from ODCTE no later than the end of the quarter following the expenditure. Final quarter requests **will not be accepted after July 31st following the end of the fiscal year.**

Technology Center WED/BIS Directors and Finance Coordinators are required to review and approve all invoices and documentation in CTIMS prior to submitting invoices to ODCTE. Failure to do so may result in delayed reimbursement.

1. All documentation, including all PEFs, must be submitted through CTIMS in **one pdf document** - in the same order as the Invoice Line Items.

2. All Invoice Line Items and Documentation must be tied to a corresponding budget line item in the CTIMS Agreement.

3. Reimbursement for third-party or vendor expenditures must include the following on all invoice documentation:
   a) Invoice number
   b) Invoice date (Do not use order date, P.O. date, ship date, receive date, or date of first class)
   c) **Itemized description with amounts**
   d) Approval signature

4. Required documentation for Instructors:
   a) If **Technology Center Staff** rate is $40/hr or *under* – **attach PEF only.**
   b) If a **Company-sponsored Instructor** rate is $40/hr or *under* – **attach PEF only**. *(effective FY23)*
   c) Company-sponsored Instructors, Adjunct Instructors or third-party contract trainers will be reimbursed up to $150/hour for specialized training.
      a. **Instructor Contracts and/or Invoices verifying Instructor rate and hours must be attached**. Documentation must show Approval Signature.
      b. Tie contracts/timesheets to appropriate PEF.
   d) Attach all PEF's to CTIMS Invoice under **Attachments** section in **one pdf document** – in the same order as the Invoice Line Items.

   *Note in the "Attachments Box" in CTIMS any abnormalities or special circumstances regarding documentation provided.

5. A serial number on each piece of equipment exceeding $500 for IT and $2,500 for all other equipment is required on invoices for training equipment.

6. When the vendor invoice does not contain sufficient accurate detail to describe what was purchased, additional supporting documentation may be required prior to payment being approved.

WED PROGRAM TYPE CODE CRITERIA

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

Apprenticeship – (Type 01)

This program type is used to document a school's support of apprenticeships occurring within an Oklahoma company. The apprenticeships may be registered or unregistered.
Note: Beginning FY21, Apprenticeship Type 01 is eligible for CST Formula Funding.

Adult and Career Development– (Type 15)
(ACD)

Through ACD classes, adults participate in learning opportunities to develop new and emerging job skills, ease workforce transition, or enhance career development. ACD training offers technical skills training, continuing education, professional development, and career development learning opportunities to individuals **16 years or older**. They are offered as open enrollment, short-term classes, seminars and occupational preparation classes.

ACD classes must contain a stated career objective in course syllabus to be eligible for Type 15.
Report all personal interest classes as a non-reimbursable type code listed on page 23.

<u>Reporting Enrollments</u>
If <u>less than</u> 50% of the students in a class are sponsored by their employer, the entire class must be reported as a Type 15.
       a. **Eligible Government Entities:** Local City Government, Local County Government, & Tribal Industries (casinos, stores, hotels and childcare facilities).
       b. **Non-Eligible Government Entities:** State Government, Federal Government, Tribal Government, & Education entity.
If the majority (50% or more) of the students in a class have an *eligible employer* reported to their student record, the entire class should be reported as a Type 31. They do not all have to be sponsored by the same employer. Eligible employer means the student is employed by the business and the training is job-related. <u>If a Type 15 class becomes a Type 31, under these parameters, the Technology Center must change Type codes before uploading enrollment reports in CTIMS.</u>

All enrollments are to be reported through the CTIMS system. Go to Page 7 - *REPORTING ENROLLMENTS PROCESS* or WED (BIS)Technical Guidebook

Customized and Safety Training Funding Eligibility
- Contact Hours for *employer* sponsored students in an ACD class will be counted in the Customized & Safety Training formula. Student enrollments must include an industry (NAICS) code to be eligible. See *Reporting Enrollments* for NAICS link.
- ACD classes conducted in a technology center district by another technology center are eligible for formula funding if approved by the technology center assigned to that district.

Safety for Government Entities <u>or</u> Safety for Industry – (Type 21)

This program type is used for safety training intended to help private or public organizations plan and implement safety processes as well as providing ongoing training to assure safe work environments for Oklahomans. This is done by providing quality safety training.

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

Reporting Enrollments:
Eligible:
- First Aid *(effective FY23)*
- CPR *(effective FY23)*
- Training that addresses site-specific hazards.
- Training provided for industry and Local, State, Federal and Tribal Governments as well as educational entities.
- Strategic Safety Plan development**.**
- Online safety courses

Non-Eligible:
- Train the Trainer
- Safety courses conducted solely by DVD/video tape

* Funding for strategic safety plan development is available through several EDI and safety initiatives. ODCTE will reimburse up to 40 hours, not to exceed $2,000 for development of a strategic safety plan.

All enrollments are to be reported through the CTIMS system. Go to Page 7 - *REPORTING ENROLLMENTS PROCESS* or WED (BIS)Technical Guidebook

Customized and Safety Training Funding Eligibility
- Technology centers delivering training to clients under Type 21 will receive funding, on a contact hour basis, according to the Customized and Safety Training Formula criteria, as defined on page 2.
- Courses not meeting the program Type 21 definition may be submitted as a program Type 31 (if they meet Type 31 Criteria). The only exclusions in this category will be for those students coded as open enrollment (99999).

Skills to Rebuild – Type 22

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

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

This program type is used for customized training designed specifically for the employees of one business or a group of businesses, industries or public sector organizations. Customized industry training qualifies for contact hours under the Customized & Safety Training (CST) Funding Formula.

The purpose of formula funding for Customized Industry Training and Government Entity Training is to support, not replace, costs incurred by a technology center in offering these classes. Technology centers delivering training to clients under Type 31 will receive funding, on a contact hour basis, according to the Customized and Safety Training (CST) Formula, as defined on Page 2.

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

- If the majority (50% or more) of the students in a class have an eligible employer, or a business registered with the Secretary of State, reported on their student record, the entire class should be reported as a Type 31. Students do not all have to be sponsored by the same employer.
  - **Eligible Government Entities:** Local City Government, Local County Government, & Tribal Industries
  - **Non-Eligible Government Entities:** State Government, Federal Government, Tribal Government, & Education entities
- Training must be job-related.
- **The technology center must have material participation in the delivery of the classes or seminars.** Material participation is defined as accepting enrollments **and** the coordinator providing one or more of the following: coordination of instructor(s), marketing of class, and design and/or provide curriculum.

All enrollments are to be reported through the CTIMS system. Go to page 7 - *REPORTING ENROLLMENTS PROCESS* or WED (BIS)Technical Guidebook

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Client-Based Consulting Programs – (Type 32)
(BES/SBM/SET)
Agri-Business Management – (Type 28 and Type 73)
(ABM)

Program Type 32 should <u>only</u> be used by technology centers with the following approved client-based programs/coordinators:

- **BES** – Business & Entrepreneurial Services
- **SBM** – Small Business Management
- **SET** – Self-Employment Training

This program type is used for client-based consulting services provided for small business owners and aspiring entrepreneurs by coordinators at the technology centers. The coordinator will partner with business owners and entrepreneurs, to create healthy, dynamic and successful long-term business ventures that grow jobs and contribute to the economic vitality of the local workforce and community. The BES/SBM/SET Coordinator will develop training (classes or seminars) for the entrepreneurial community and small business workforce within the technology center district.

The information submitted using Program Type 32 is <u>not included</u> in Customized and Safety Training Formula Funding calculations. <u>These programs/coordinators are approved and included in the equalization formula at a specific position equivalent value</u>.

Agri-Business Management (ABM) – Type 28 and Type 73
Program Type 28 and Type 73 should only be used by technology centers with an approved Agri-Business Management (ABM) client-based program. ABM Coordinators provide one-on-one consulting services and customized business management education for owners of agricultural businesses. Type 28 may be used for reporting ABM seminars/trainings. Type 73 should be used for reporting ABM client consulting hours.

<u>Reporting Enrollments:</u>
Classes, trainings or seminars may be reported under the following Type Codes, depending on which criteria they meet:

1. **Type 15 (ACD) -** If <u>less than</u> 50% of the students in a class are sponsored by their employer or student <u>does not</u> have a business registered with the Secretary of State.
2. **Type 31** (**Customized Industry Training**) if all the criteria below is met:
   a. If the majority (50% or more) of the students in a class have an eligible employer**, or students have a business registered with the Secretary of State,** reported on their student record, the entire class should be reported as a Type 31. They do not all have to be sponsored by the same employer.
   b. The coordinator <u>did not</u> deliver the majority of the training but had material participation in relation to the class or seminar. Material participation is defined as accepting enrollments **and** the coordinator providing one or more of the following: coordination of instructor(s), marketing of class, and design and/or provide curriculum.

<mark>Sole Proprietorships *(effective FY23)*:</mark>
To request a Business Client Code for a Sole Proprietorship – the following information <u>must be provided</u>:

1. Name of Business or Individual
2. Physical Address (cannot be a P.O. Box)
3. Mailing Address
4. NAICS Code

NOTE: Be prepared to provide authentication of doing business: website, social media/e-commerce page

**Use 99999 – Business Code for enrollments, when training or consulting is not industry sponsored.

All enrollments are to be reported through the CTIMS system.
Go to page 7 - *REPORTING ENROLLMENTS PROCESS* or [WED (BIS)Technical Guidebook](#)

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Small Business Programs – (Type 15 or Type 31)
(*other than* BES/SBM/SET *funded Programs*)

</div>

Small Business or Entrepreneurial programs that may be focused locally as business development, incubator and/or management development services. Similar to the BES/SBM/SET programs, these programs/coordinators provide consulting, strategic planning and training to the entrepreneurial community within their technology center district. Under these programs, coordinators develop classes or seminars serving both small business owners and aspiring entrepreneurs. Classes or seminars may qualify as either a Type 15 (ACD) open enrollment training or a Type 31 (Customized Industry Training) depending upon qualifying enrollment criteria.

Reporting Enrollments:
Training activities, under these programs, should be reported as either Type 15 or Type 31 – dependent upon the criteria, below.
1. **Type 15 (ACD) -** If less than 50% of the students in a class are sponsored by their employer or student does not have a business registered with the Secretary of State.
2. **Type 31** (**Customized Industry Training**) if all the criteria below is met:
    a. If the majority (50% or more) of the students in a class have an eligible employer, or students have a business registered with the Secretary of State, reported on their student record, the entire class should be reported as a Type 31. They do not all have to be sponsored by the same employer.
    b. **The technology center must have material participation in the delivery of the classes or seminars.** Material participation is defined as accepting enrollments **and** the coordinator providing one or more of the following: coordination of instructor(s), marketing of class, and design and/or provide curriculum.
3. ==**Type 60 (Consulting)** – (*effective FY23*) -== Consulting hours provided by coordinators who are *not* part of a BES/SBM/SET/ABM program are to be reported under Type 60. **These hours are non-reimbursable as they are not training related and will not be included in the Customized and Safety Funding Formula.**

==Sole Proprietorships *(effective FY23)*:==
To request a Business Client Code for a Sole Proprietorship – the following information must be provided:
5. Name of Business or Individual
6. Physical Address (cannot be a P.O. Box)
7. Mailing Address
8. NAICS Code

NOTE: Be prepared to provide authentication of doing business: website, social media/e-commerce page
**Use 99999 – Business Code for enrollments, when training or consulting is not industry sponsored.

All enrollments are to be reported through the CTIMS system. Go to page 7 - *REPORTING ENROLLMENTS PROCESS* or [WED (BIS)Technical Guidebook](#)

Training for Industry Growth – (Type 42)
(TIG)

The Training for Industry Growth (TIG) Economic Development Initiative (EDI) funds allow technology centers to establish training agreements with multiple members of business and industry who are experiencing common critical skilled workforce shortages within a defined geographic region of the state.

Technology centers with approved projects will be reimbursed on a project-by-project basis. Training for Industry Growth Initiative funds are intended to supplement, not replace, the business and industry services budget at the approved technology center. **TIG funding is based upon the availability of state appropriated funds.**

This initiative is intended to assist industry by providing high quality completers in their specific area of need. The training project should be designed to meet only the critical immediate need. It is preferred, but not required, that the training result in a nationally recognized certification. A TIG training project is considered to be a **short-term** solution. Short-term is defined as 3 years or less. **Program completion must result in job attainment or advancement.**

Targeted Industry Sectors:
- Manufacturing
- Aerospace and Defense
- Energy
- Transportation and Distribution
- Agriculture and Biosciences
- Information and Financial Service
- Health

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

Company Commitments (Qualifications):
- Demonstrate/verify worker shortage.
- Demonstrate active recruitment of workforce required to fill the number of vacancies.
- Make technical experts available to meet with representatives of the technology center and RC to assist with the identification of common skill requirements.
- Provide **Letters of Commitment** to the Tech Center indicating number of workers they will sponsor and/or indicating number of students they will hire upon completion.
- After course completion, the company will hire the workers it sponsored if they are still eligible for employment and will have the option of hiring other program completers who were not sponsored by a specific company.

Technology Center Commitments:
- A Needs Assessment identifying commonalities for all companies will be performed by Technology Center Representative or Coordinator.
- Technology Center Representative or coordinator and instructor will design the program to meet the standards identified by the Needs Assessment as the minimum skill requirement for current vacant positions.
- Training must be delivered by a technology center staff member or adjunct instructor.

- Technology Center (TC) Representative or Coordinator will obtain **Letters of Commitment** from participating companies.
- TC Representative or Coordinator will complete an EDI Training Budget Proposal, using the appropriate fiscal year worksheet, FY23 EDI Worksheet.xlsx and email to appropriate Regional Coordinator for review and approval prior to entering Worksheet in CTIMS.
- **A Purchase Order (P.O.) issued by ODCTE and entered in CTIMS must be in place before training may begin or purchases are made.**

Method for Distributing Funds:

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

1. Upon allocation of TIG funds to a technology center, an agreement must be initiated in CTIMS, by the Technology Center Representative or Coordinator, within fifteen (15) calendar days.
2. **Training must begin within sixty (60) calendar days of the purchase order being entered into CTIMS.** If training does not start within the first sixty days the allocated funds will be removed.
3. Status of training will be verified by the Regional Coordinator through active invoicing, current program enrollment forms (PEFs), or dated sign-in sheets/rosters.

Equipment Purchases:

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

Project Application:

TIG projects may be applied for in CTIMS and will be considered for approval on a project-by-project basis, based on the availability of state appropriated funds. To apply for a TIG project go to *EDI and GRANT APPLICATION PROCESS*, page 5.

Reporting Enrollments:

All enrollments are to be reported through the CTIMS system. Go to Page 7 - *REPORTING ENROLLMENTS* process or WED (BIS)Technical Guidebook

Follow-Up Interviews and Data Collection:

In addition to reporting enrollments under the appropriate Type Code in CTIMS, a follow-up interview is to be conducted with each business served through a TIG funding agreement at the conclusion of the funding agreement. The information collected will be used to demonstrate accountability to the taxpayers of Oklahoma and quality assurance for our system.

All information provided will remain confidential. The information will be aggregated as part of consolidated reporting of all businesses, industries, agencies and organizations receiving WED/BIS services and will not be presented in any company-identifiable manner without the company's consent. A survey will be provided by the Manager of Workforce and Economic Development Division.

Reimbursements:

See *INVOICING FOR EDI PROJECT FUNDING REIMBURSEMENT* process on page 10.

Training for Industry Credentials:

In the event training is being conducted for the purpose of industry certification, reimbursement may be provided based upon the greater of $300 per completer or the allowable instructor reimbursement rate for

technology center instructor, adjunct instructor, or contract trainer. In order to qualify as training for industry certification, there must be an industry-recognized certification examination associated with student completion.

Truck Driver Training – (Type 44)

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

Training for Industry Program – (Type 52)
(TIP)

Growing Oklahoma's economy will largely depend on the ability of technology centers to provide start-up training for new and expanding companies. The Training for Industry Program (TIP) grant is used for high quality training customized specifically for new companies coming to Oklahoma or for Oklahoma companies expanding their workforce, resulting in net-new jobs in Oklahoma. TIP funds allow technology centers to assist Oklahoma companies as they create and grow new jobs by providing high quality customized training at low or no cost to the company. State Regional Coordinators (RC) will work with the technology center to develop the training agreement.

Companies may be identified in a number of ways including Department of Commerce, local Technology Center coordinators, chambers of commerce, economic development authorities, etc. Companies not located in a technology center district will have training delivered by the most appropriate organization or technology center.

<u>**Eligibility Criteria:**</u>
TIP is designed to support companies that are creating net new jobs in Oklahoma that produce goods or services that are exported outside the state of Oklahoma and/or supply exporters-in the following identified ecosystems:
- Manufacturing
- Aerospace and Defense
- Energy
- Transportation and Distribution
- Agriculture and Biosciences
- Information and Financial Service
- Health

- Training must be for full time (30 hours or more per week), permanent jobs

- Net New jobs must provide a comprehensive benefit package with 50 percent of the benefits being company paid within 180 days of hire. A "Net New Job" is a position(s) made open in a company due to expansion of workforce.
- Employees are considered to be a new hire after the TIP allocation meeting with the Company, Technology Center Coordinator and State Regional Coordinator has occurred. Employees hired _before_ the TIP meeting with Regional Coordinator will **not** be eligible for TIP training funds.
- Temporary to permanent employees are eligible for TIP - Contract or letter from temp agency required for proof that they are temp to hire.
- WorkKeys can be paid for under TIP agreements.

Non-Eligible Criteria:
- On the job training (OJT) does not qualify.
- Any TIP paid training that works with tangible items or services CANNOT enter the chain of commerce.
- TIP cannot be used for attrition, turnover, or retention. Companies who have downsized under the following circumstances however may be eligible for TIP.
- Travel reimbursement for TIP training is not allowable _(effective FY23)._

Re-Eligibility Criteria:
- **Layoffs (more than one-year-old)** – Companies that incurred layoffs more than one year ago are eligible for TIP when they create new jobs. Their new baseline job count will be the number of employees at the time of the request for TIP.
- **Downsized Companies** – Companies that downsize as a result of increased efficiencies and then add new jobs to add product lines or increase output will qualify for TIP.
- **Downsized Companies with No Previous TIP Agreement** – An otherwise qualifying company that has never received TIP services is eligible regardless of past employment fluctuation when it creates new jobs. Its baseline job count begins at the point it starts its first TIP agreement.

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

4. Upon allocation of TIP funds to a technology center, an agreement must be initiated in CTIMS, by the Technology Center Representative or Coordinator, within fifteen (15) calendar days.
5. **Training must begin within sixty (60) calendar days of the purchase order being entered into CTIMS.** If training does not start within the first sixty days the allocated funds will be removed.
6. Status of training will be verified by the Regional Coordinator through active invoicing, current program enrollment forms (PEFs), or dated sign-in sheets/rosters.

TIP Process:

Technology Center will:

1. Inform qualifying companies that TIP funds may be available; provide basic information on TIP guidelines and process and perform a preliminary training needs assessment.
2. Technology Center Coordinator contacts Regional Coordinator to review company's TIP eligibility prior to meeting with company.
3. Schedule a meeting with the company, Regional Coordinator, and Technology Center Coordinator to review TIP eligibility, discuss TIP process, and next steps if applicable.
4. If company is eligible, Technology Center Coordinator will complete an EDI Training Budget Proposal, using the appropriate fiscal year worksheet at FY23 EDI Worksheet.xlsx and email to appropriate Regional Coordinator for review and approval prior to entering Worksheet in CTIMS.

ODCTE will:

1. Discuss the TIP process with TC Coordinator and will review the company's TIP eligibility prior to meeting with company.
2. Attend budget planning meeting(s) with the company and Technology Center Coordinator to provide assistance with the TIP process and address any questions.
3. Review each eligible application and prepare ODCTE funding and ROI calculation to determine eligibility of proposed training.
4. Notify the TC Coordinator if/when the application is approved.

Project Application:

TIP projects will be applied for in CTIMS and will be considered for approval on a project-by-project basis. All qualifying projects must be approved through the appropriate ODCTE state staff to be considered ready to train. The official start date of the project will be reflected in CTIMS as the date the ODCTE P.O. number is entered. No reimbursable training is to take place before the agreement is approved in CTIMS.

- Project Changes: **All worksheet changes or budget adjustments to agreements, made to EDI projects, must be fully approved in CTIMS prior to beginning the affected training**. See CTIMS EDI Approval Process Overview in Appendix. Retrospective change requests will be rejected and will result in forfeiture of ODCTE reimbursement.

TIP Training Video: refer to the TIP Process Video for more information on TIP application process.

To apply for a TIP project, go to *EDI GRANT APPLICATION*, page 5.

Reporting Enrollments:

All enrollments are to be reported through the CTIMS system. Go to Page 7 - *REPORTING ENROLLMENTS* process or WED (BIS)Technical Guidebook

Reimbursements:

See *INVOICING FOR EDI PROJECT FUNDING REIMBURSEMENT* process on page 10**.**

Training for Industry Credentials

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

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

These program types are used for many classes that are essential to the communities served by the technology center but do not meet the guidelines for state funding.

60 – Informal Training (non-reimbursable): The designation for technical assistance using organizational development tools or processes (needs assessment, surveys). ==Includes consulting hours provided by Coordinators of non-funded Small Business or WED (BIS)/ACD Programs *(effective FY23),*== phone consultation and preparation time, but it does not include professional development meetings, professional association meetings or marketing-related activities (cold calls, informal visits, public appearances, etc.). This training is not eligible for formula funding.

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

61 – Community Services (non-reimbursable): The designation for classes conducted and/or coordinated by the technology centers that are typically not occupational in nature but meet the needs of the community interests. Examples are ACT workshops, soap making, hunter safety, staff development and yoga. Classes and activities reported under this program type are not eligible for formula funding.
Type 61 can be reported without submitting separate student data.

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

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

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

Oklahoma Procurement Technical Assistance Center– (Type 79) (OkPTAC)

This program type is used for counseling assistance to Oklahoma businesses related to selling products and services to federal, state and local governments.

The primary purpose of OkPTAC is to create jobs and expand the economy in Oklahoma by counseling and coaching businesses, assisting with finding new opportunities, competing successfully on those opportunities and performing successfully on the resulting contracts.

Organization:
Participating technology centers deliver OkPTAC services at locations throughout Oklahoma. The Oklahoma Department of Career and Technology Education administers the program. OkPTAC, which serves as a Procurement Technical Assistance Center, is funded in part through a cooperative agreement from the Department of Defense through a program that is administered by the Defense Logistics Agency.

Funding And Performance Guidelines For Existing Bid Assistance Centers:
1. Minimum performance standards. For existing bid assistance centers to be entitled to full funding, they must meet established minimum performance standards as described in program documents and each technology center's annual program proposal.
2. Previous performance. Programs are monitored each year in performance to goals and in overall contribution to the statewide program performance.
3. Annual application. Centers participating in the OkPTAC must apply each year. Preference is given to applications submitted by successful existing centers.
   Performance standards; evaluation. Each center submits new goals in its annual application for the next year. Goals and other metrics are described in each year's opportunity announcement and in the program general terms and conditions. All program documents can be obtained upon request from the program office at ODCTE.
4. Funding. Funding is based on each year's proposed budget as negotiated with ODCTE and contingent on sufficient federal funds being awarded by DLA.
5. Funding agreement. An approved funding agreement must be executed between each local school and the department each year. The program year runs August 1 through July 31.
6. Memorandum of Understanding. Each technology center participating in the OkPTAC must sign a memorandum of understanding which includes by reference the school's proposed application and the program's PTAP General Terms and Conditions issued by the DLA, as well as all applicable federal laws and regulations governing federal grant programs.

OkPTAC Policy and Procedures Manual. The manual spelling out OkPTAC's policies and procedures is maintained at the ODCTE. A copy is given each OkPTAC coordinator at new hire orientation and upon request. A digital copy is available upon request.

Firefighting Training Initiative – (Type 83) (FFT)

Oklahoma's economic future depends on the ability of technology centers to provide training for members of volunteer fire departments. Frequently this requires providing existing firefighters with upgrade training or training on new systems or equipment. The Firefighter Training (FFT) Initiative funds will allow technology centers to establish more partnerships with members of volunteer fire departments. FFT training includes firefighter training and associated testing as well as first responder training and associated testing for firefighters who are members of volunteer fire departments in Oklahoma.

Tuition <u>will not</u> be charged for Firefighter Training (FFT) initiative projects.

<u>Method for Distributing Funds:</u>
Technology centers will be reimbursed on a project-by-project basis for tuition-free training programs designed to meet specific needs of members of volunteer fire departments within their districts. Depending upon availability of state appropriated funds, each technology center will have a specific amount of Firefighter Training Initiative funds allocated at the beginning of each fiscal year.

<u>FFT Process:</u>
Technology Center will:
- Inform the volunteer fire departments of the Firefighter Training Initiative funds that are available.
- Assist members of volunteer fire departments to determine if training could enhance their abilities to serve their community.
- **Technology Center Coordinator will complete an EDI Training Budget Proposal, using the appropriate fiscal year worksheet at** FY23 EDI Worksheet.xlsx and email to appropriate Regional Coordinator for review and approval prior to entering Worksheet in CTIMS.

ODCTE will:
- Approve each eligible application for specific direct costs prior to the project start date.
- Notify the technology center if/when the application is approved.
- Process all claims for payment when submitted in CTIMS within 20 business days as per ODCTE Finance division.

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

<u>Eligibility Criteria:</u>
This initiative is intended to serve members of volunteer fire departments in order to enhance knowledge and skills of the members. Reimbursement will be available for the following types of Firefighter Training Initiative projects:
- Basic and upgrade training for members of volunteer fire departments
- Training in a common skill set for a group of volunteer fire departments

<u>Non-Eligible:</u>
- No equipment can be purchased under the FFT initiative.
- No classroom supplies can be purchased under the FF initiative. (Example: pens, pencils, paper, white board markers, erasers etc.)
- Funds cannot be used for indirect costs, building construction, remodeling or leasing of facilities. Technology centers will be encouraged to pool resources for larger projects.

Project Application:
FFT projects will be applied for in CTIMS and will be considered for approval on a project-by-project basis. All Firefighter Training Initiative projects must be fully approved prior to the project start date. The official start date of the project will be reflected in CTIMS as the date the ODCTE Purchase order (PO) number is entered. No reimbursable training is to take place before the agreement is approved in CTIMS.

- Project Changes: **All worksheet changes or budget adjustments to agreements, made to EDI projects, must be fully approved in CTIMS prior to beginning the affected training**. See CTIMS EDI Approval Process Overview in Appendix. Retrospective change requests will be rejected and will result in forfeiture of ODCTE reimbursement.

To apply for a FFT EDI Grant go to *EDI GRANT APPLICATION PROCESS*, page 5.

Reporting Enrollments:
All enrollments are to be reported through the CTIMS system. Go to Page 7 - *REPORTING ENROLLMENTS* process or WED (BIS)Technical Guidebook

Reimbursements:
If a technology center staff member is used as an instructor, ODCTE will reimburse *up to* $40 per hour (the $40 includes FICA). Firefighter Training Initiative funds are intended to supplement, not replace, the business and industry services budget at each technology center.

See *INVOICING FOR EDI PROJECT FUNDING REIMBURSEMENT PROCESS* on page 10.

Safety Training Grants – (Type 90)

The Oklahoma Department of Career and Technology Education provides funds (if available) to assist in offsetting costs related to purchasing new equipment, upgrading equipment, and instructional libraries and/or instructor training. All qualifying projects must be approved through the WED/BIS Director role. Safety training grants will not exceed $2,000 for each Technology Center. **Safety training grant funds cannot be used for indirect costs, building construction, remodeling or leasing facilities**.

Application:
Safety training grants will be considered on a project-by-project basis. Prior to allocation of funds, written documentation/quote from equipment/product supplier must be provided to the appropriate Regional Coordinator for approval. Once the allocation is made in CTIMS, the Technology Center will have 15 business days to create an Agreement in CTIMS. Once a P.O. is issued by ODCTE in CTIMS, the Technology Center has 60 calendar days to initiate the purchase or the funding will be eligible for reallocation to other Tech Centers. **Purchases may not be made until a Purchase order issued by ODCTE has been entered in CTIMS**.

To apply for a Safety Grant, go to *EDI GRANT APPLICATION*, on Page 5.

Reimbursements:
Vendor/supplier documentation showing item(s) have been purchased by the Technology Center must be provided for reimbursement. For reimbursement, see *INVOICING FOR EDI PROJECT FUNDING REIMBURSEMENT* process on Page 10.

Incubator Grants and
Incubator Consulting Hours– (Type 68)

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

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

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

Application:
Incubator grants will be considered on a project-by-project basis. Prior to allocation of funds, written documentation/quote from equipment/product supplier must be provided to the appropriate Regional Coordinator for approval. Once the allocation is made in CTIMS, the Technology Center will have 15 calendar days to create an Agreement in CTIMS. Once a P.O. is issued by ODCTE in CTIMS, the Technology Center has 60 calendar days to initiate the purchase, or the funding will be eligible for reallocation to other Tech Centers. **Purchases may not be made until a Purchase order issued by ODCTE has been entered in CTIMS**.

Reporting Consulting Hours:
All consulting hours conducted with incubator clients are to be reported as **Type 68**. Classes or seminars, offered through a technology center incubator, may qualify as either a Type 15 (ACD - open enrollment) training or a Type 31 (Customized Industry Training) depending upon qualifying enrollment criteria. Go to *REPORTING ENROLLMENTS*, Page 7 for eligibility criteria.

Sole Proprietorships *(effective FY23)*:
To request a Business Client Code for a Sole Proprietorship – the following information must be provided:
9.   Name of Business or Individual
10. Physical Address (cannot be a P.O. Box)
11. Mailing Address
12. NAICS Code

*** NOTE: Be prepared to provide authentication of doing business: website, social media/e-commerce page**
***Use 99999** – Business Code for enrollments, when training or consulting is not industry sponsored.

Appendix

FY21 EDI Budget Proposal (*FY21 Worksheet*): FY23 EDI Worksheet.xlsx

CTIMS EDI Approval Process Overview

Worksheet Approval Stage (Stage 1)

	EDI Role	Process
1.	Local Coordinator	Initiate the Worksheet Approval process. Budget is added here along with company information. Upload the Excel spreadsheet, as well as supporting documents (i.e. 3rd party vendor proposal).
2.	State Regional Coordinator	Approve the budget and line items and confirm company information is entered completely.
3.	State Initiative Supervisor	Approve the budget and line items. The Worksheet becomes fully approved.

Change Request Worksheet Approval Stage (if changes to worksheet necessary)

	EDI Role	Process
1.	Local Coordinator	Initiate the Change Request process if changes to budget line descriptions, units, unit types or vendor/provider information needs to be changed.
2.	State Regional Coordinator	Approve the budget and line items.
3.	State Initiative Supervisor	Approve the budget and line items. The changes are approved. The Worksheet becomes fully approved.

Agreement Approval Stage (Stage 2)

	EDI Role	Process
1.	Local Coordinator	Initiate the Agreement approval process. (No changes should need to be made.)
2.	Local WED/BIS Director	Approve the Agreement
3.	State Regional Coordinator	Approve the Agreement. The approval will generate a signature on the SOU.
4.	State Initiative Supervisor	Approve the Agreement. The approval will generate a signature on the SOU.
5.	Local Superintendent/CEO (or designee)	Approve the Agreement. The approval will generate a signature on the SOU.
6.	State Requisition Coordinator	Generate the SOU, submit the requisition to finance, enter the PO number into the Agreement.
7.	Local Finance Coordinator	Enter OCAS codes and add new codes as needed. The Agreement becomes fully approved.

Budget Adjustment Approval Stage (if Agreement changes are necessary)

	EDI Role	Process
1.	Local Coordinator	Initiate the Budget Adjustment process. Budget is adjusted and/or new line items added here.
2.	Local WED/BIS Director	Approve the Budget Adjustment.
3.	State Regional Coordinator	Approve the Budget Adjustment.
4.	State Initiative Supervisor	Approve the Budget Adjustment.
5.	Local Superintendent/CEO (or designee)	Approve the Budget Adjustment.
6.	State Requisition Coordinator	Verify the PO amount is still accurate. (if $ increased, then request finance increase the PO amount)
7.	Local Finance Coordinator	Verify OCAS codes and add new codes as needed. The Budget Adjustment becomes fully approved.

Invoice Approval Stage (Stage 3)

	EDI Role	Process
1.	Local Coordinator	After training is complete, the EDI Local Coordinator initiates the invoice process.
2.	Local WED/BIS Director	Review and approve invoice line items and attachments.
3.	Local Finance Coordinator	Review and approve invoice line items and attachments.
4.	State Regional Coordinator	Review and approve invoice line items and attachments.
5.	State Requisition Coordinator	Verify the invoices, print the documentation, and deliver to the finance department.
6.	ODCTE EDI Finance Reviewer	Review and approve the invoice and documentation. The invoice becomes fully approved. Pay the claim.

Summary of Revisions

Changes Made Effective July 1, 2023

1. Removed from front title page: "Business and Industry Services". Guidelines now titled "Workforce and Economic Development" or "WED" Guidelines
2. Updated Contacts Pages to reflect new personnel for Regional Coordinators and CTIMS/IMD as well as new hyperlinks for CTIMS and EDI related webpages/sites.
3. Pages 8 and 17 - Added under Reporting Enrollments (page 8) and Small Business Programs (page 17), the following:

Reporting Small Business Program Consulting of Non-Funded Programs *(other than* BES/SBM/SET *funded Programs)*
Consulting hours provided by coordinators who are **_not_** part of a BES/SBM/SET/ABM program are to be reported under **Type Code 60 – Informal Training. These hours are non-reimbursable as they are not training related and will not be included in the Customized and Safety Funding Formula.**

SOLE PROPRIETORSHIPS
To request a Business Client Code for a Sole Proprietorship – the following information must be provided:
1. Name of Business or Individual
2. Physical Address (cannot be a P.O. Box)
3. Mailing Address

4. NAICS Code

* NOTE: Be prepared to provide authentication of doing business: website, social media/e-commerce page
**Use 99999 – Business Code for enrollments, when training or consulting is not industry sponsored.

4. Page 12 - Invoicing Checklist - added following:
   a. All documentation, including all PEFs, must be submitted through CTIMS in **one pdf document** - in the same order as the Invoice Line Items.
   4. Required documentation for <u>Instructors</u>:
      b) <mark>If a Company-sponsored Instructor rate is $40/hr or under – attach PEF only.</mark> (effective FY23)

5. Page 13 – Apprenticeship (Type 01) – removed: The apprenticeships may be registered or unregistered. Schools can receive funding for providing Related Technical Instruction (RTI) in support of the apprenticeship.
6. Removed "Travel" from Invoicing Checklist (page 12) – travel reimbursement will no longer be eligible under TIP.
7. Page 14 - Type 21 - Added CPR and 1ˢᵗ Aid as "eligible training"
8. Page 16 - Client-Based Consulting Programs -added Sole Proprietorship information in #3, above.
9. Page 22 - added link to TIP Training Video: <u>TIP Process Video</u>
10. Page 23 – Non-Reimbursed Classes (Type 60) – added, "<mark>Includes consulting hours provided by Coordinators of <u>non-funded</u> Small Business or WED (BIS)/ACD Programs *(effective FY23),*</mark>
11. Page 27 - added Sole Proprietorships information in #3, above.
12. Removed all references to MIS Codes as these will no longer be required.
13. Removed "Changes Made Effective July 19, 2019" pages.

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Changes Made Effective July 1, 2021

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14. **Changed Title Page and Contacts to reflect revised ODCTE division names and staff information.**
15. Acronyms and Definitions page - *added* "WED" definition.
16. **Page 12, Invoicing Checklist #1 –** *added* *"including all PEFs,"*

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Changes Made Effective July 1, 2020

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17. *Added* **following pages**:
    a. Contacts – *added EPCS Team/Regional Coordinator, OkPTAC and CTIMS/IMD Support Services & Resources links and contacts.*
    b. Economic Development Initiatives (EDI) Funding
    c. EDI Grant Application Process (verbiage moved from FFT, TIG, TIP sections)
    d. Invoicing for EDI Project Funding Reimbursement and Invoicing Checklist
    e. *Replaced* "Specific Information" with "*BIS Program Type Code Criteria*"
18. **Added Definitions to "Acronyms" page Acronyms also added**:
    a. ABM-Agri-Business Management
    b. CST - Customized and Safety Training
    c. OkPTAC - Oklahoma Procurement Technical Assistance Center
    d. OLT - Online Training
    e. NAICS - North American Industry Classification System
    f. RTI - Related Technical Instruction
    g. SOU - Statement of Understanding
    h. VC – Virtual Class
    i. *Added* following definitions:
       i. Contact Hours - Number of Enrollments multiplied by Number of Class/Course Hours
       ii. Customized and Safety Training (CST) Formula Funding
       iii. 99999
19. General Information page: reworded and **_added_** **Customized and Safety Training (CST) Formula** funding as definition to replace "Performance Funding" and "BIS Performance Funding". CST is term used consistently throughout document to refer to formula funding. Added reference to Contacts page.
20. Replaced ~~**PERFORMANCE AND PRODUCTION FUNDING PAYMENTS (CUSTOMIZED & SAFETY)**~~ with new title - **CUSTOMIZED AND SAFETY TRAINING FORMULA FUNDING AND PAYMENTS** Customized and Safety Training Formula Funding Payment Process – *combined #1 and #2*.

New and modified - Customized & Safety Training Funding Formula Calculations – *added Type 01 Criteria to CST funding formula as well as modifying Type 15 verbiage:*

2) The Information Management Division (IMD) at ODCTE reviews the enrollment data submitted. **To calculate eligible contact hours for use in the funding formula, the following criteria must be met**:

    b. Under "Program **Type 15** (ACD Training) Criteria", added:

        i. **Classes must contain a stated career objective in course syllabus to be eligible for Type 15.**

        ii. Students submitted with an industry (NAICS) code (see link at the end of this section) will be counted EXCEPT for those employed by a state government, federal government, tribal government, education entity or those coded as open enrollment (99999). Tribal business entities such as casinos, stores, hotels and childcare facilities will be included. Payment for eligible contact hours in program type 15 will be included with program type 31, if the following criteria is met:

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

        iii. ACD classes conducted in a technology center district by another technology center are eligible for formula funding if approved by the technology center assigned to that district.

    b. Program Type 01 (Apprenticeship) Criteria

    Effective FY21, Apprenticeship Type 01 is eligible for CST Funding Formula. This program type is used to document a school's support of apprenticeships occurring within an Oklahoma company. The apprenticeships may be registered or unregistered. Schools can receive funding for providing Related Technical Instruction (RTI) in support of the apprenticeship.

    *Link to North American Industry Classification System (NAICS) codes**: https://www.census.gov/eos/www/naics/**

    a. Added **NON-REIMBURSEABLE ACTVITIES** (formerly only in Reporting Enrollments section)

21. *New* - **ECONOMIC DEVELOPMENT INITIATIVES (EDI) FUNDING**
    Method for Distributing Funds:

    Projects will be considered for approval on a project-by-project basis, based on the availability of funds.
    TIG and TIP: Projects will be funded based on a scoring process utilizing the Return on Investment (ROI) calculator to generate a score. Those proposals with the most ROI will have priority in funding. A cut score could keep a TIP or TIG project from being eligible for funding.
    Deadlines for EDI (TIP, TIG) & Grant (Safety, Incubator): Once funds are designated for a specific project, the following timeline must be followed:

        1. Upon allocation of EDI or Grant funds to a technology center, an agreement must be initiated in CTIMS, by the Technology Center Representative or Coordinator, within fifteen (15) business days.
        2. **Training must begin within sixty (60) calendar days of the purchase order being entered into CTIMS.** If training does not start within the first sixty days, the allocated funds will be removed.
        3. Status of training will be verified by the Regional Coordinator through active invoicing, current program enrollment forms (PEFs), or dated sign-in sheets/rosters.

    *Note: Firefighting Training (FFT) funds are allocated at the beginning of the fiscal year and assigned a P.O. in CTIMS. The deadlines, above, are not applicable to FFT funds.

22. **EDI GRANT APPLICATION PROCESS** (combined verbiage from FFT, TIG, TIP sections)

23. *New* **ONLINE TRAINING** Redefined OLT reporting, added Virtual Classes guidelines added to Reporting Enrollments section

    All Online Training must be reported with the appropriate Type Code.
    Online Training (OLT) must be a minimum of thirty minutes to be reported. Online training that occurs in less than a half hour increment must be grouped together with similar incremental trainings to arrive at a reporting level that is at least one-half hour. For instance:

- Two, 11-minute safety trainings and one, 8-minute safety training could be grouped into one, ½ hour enrollment
- Five, 12-minute trainings could be grouped into a 1-hour enrollment
- Twelve, 20-minute trainings could be grouped into a 4-hour enrollment.
- Two, 11-minute trainings would not be reported because it is less than one half hour.
- Three, 12-minute trainings could be reported as one training because it is more than one half hour.

For simplification, these OLT training sessions may be titled and reported in one of the following broad categories which are outlined on the BIS Star Map:

- Aerospace-OLT
- Agriculture, Food and Natural Resources-OLT
- Architecture and Construction-OLT
- Business Mgmt. and Admin.-OLT
- Entrepreneurship-OLT
- Finance-OLT
- Health Science-OLT
- Hospitality/Tourism-OLT
- Human Services-OLT
- Information Technology-OLT
- Law, Public Safety, Corrections and Security-OLT
- Manufacturing-OLT
- Safety-OLT
- Transportation, Distribution and Logistics-OLT

Refer to the BIS Star Map for sub-categories in these headings; https://www.okcareertech.org/about/careertech-system/bis-programs-guide/business-and-industry-services-program-guide

These categories are not to be interpreted to replace reporting for half hour or longer training sessions with a specified topic. For example, a 4-hour training on "Developing Leadership Skills" should still be listed by that topic with OLT following or a 6-hour "Microsoft Excel" class should be labeled as such with OLT following the title. For example, *Developing Leadership Skills-OLT* or *Microsoft Excel-OLT*.

Virtual Classes

Training conducted in real time by an instructor via an online platform (Zoom, Teams, GoToMeeting, etc.) should be reported with the appropriate type code and with the class title **followed by –VC (Virtual Class).**

Webinars and previously recorded virtual classes delivered as online training shall be reported as OLT.

Classes that are a blend between OLT and in-person training should be recorded where the majority of the training occurred.

24. ~~**TRAINING FOLLOW-UP INTERVIEW AND DATA COLLECTION:**~~ replaced by **TIP & TIG FOLLOW-UP INTERVIEWS and DATA COLLECTION:**

25. **INVOICING FOR EDI PROJECT FUNDING REIMBURSEMENT** - relocated to front portion of guidelines
    Added or moved from other sections:
    - 1ST Paragraph: **Final quarter requests will not be accepted after July 31 following the end of the fiscal year.**
    - For invoicing instructions in CTIMS, go to the **EDI Invoice Process Guidebook** at: https://www.okcareertech.org/about/state-agency/divisions/imd/ctims/CTIMSEDIInvoiceProcessGuidebook.pdf
    - From TIP section, added - **EDI PROJECT REIMBURSEMENT:** Items that technology centers may include in funding agreements are instructor salaries, training related equipment, curriculum development (up to 2% of the total TIP training funds, excluding consumables), and instructional supplies. See **Invoicing Checklist** for reimbursement requirements.
      Instructional Rates:
      Added Schools are encouraged to use their staff members for training when possible.
      - Technology Center Staff
        - Reimbursable up to $40.00/hr ($40 includes FICA).
    - *Removed* - If Technology Center Staff rate is over $40/hr – attach Contracts or timesheets indicating hourly rate.
      (*NEW* - *Moved Company-sponsored to same as Adjuncts*)
      - **Company-sponsored** Instructors, Adjunct Instructors or Third-Party Contract Trainers
        - Reimbursable up to $150/hr (includes FICA)
        - Any specialized training request over $150/hour (regardless of unit type) must be pre-approved with the Regional Coordinator and will require appropriate documentation to be uploaded with the agreement and supported in the comments.
      - Safety training included in a TIG or TIP agreement is NOT to be reported as a Type 21.
    - **Consumable Expenses** (*New* – *formerly only applicable to TIP agreements*)
      ODCTE will only reimburse for consumables utilized based on the number of students who complete training. The company or the technology center will bear the burden of consumable expenses for students who do not complete training under an EDI agreement.
    - **TIP Projects Only**
      Reimbursement for company-provided new employee orientation will be reimbursed at a maximum of $100 per new employee.
    - Added Travel Reimbursement guidelines from Invoicing Checklist.
    - **Training For Industry Credentials** (from TIG section)
      In the event training is being conducted for the purpose of industry certification, reimbursement will be provided based upon the greater of $300 per completer or the allowable instructor reimbursement rate for technology center instructor, adjunct instructor, or contract trainer. To qualify as training for industry certification, there must be an industry-recognized certification examination associated with student completion
      Invoicing Checklist changes:
    - Moved Travel Reimbursement information to **Invoicing for EDI Project Funding Reimbursement** section

26. Expanded "Reporting Enrollments" section to include:
    a. *New* **Online Training information**
    b. TIP & TIG Follow-up Interviews and Data Collection modified
    c. If less than 50% of the students in a class are sponsored by their employer, the entire class must be reported as a Type 15.
       i. **Eligible Government Entities:** Local City Government, Local County Government, & Tribal Industries (casinos, stores, hotels and childcare facilities).
       ii. **Non-Eligible Government Entities:** State Government, Federal Government, Tribal Government, & Education entity.

27. ~~Specific Information for Each~~ title replaced with "*BIS Program Type Code Criteria*"

28. *Added* to Client Consulting Programs (formerly Services) – descriptions for Agriculture Business Management (ABM) - (Type 28) and Agriculture Business Management Clients (Type 73)

29. *New -* "Small Business Programs" Guidelines are– these are defined to address enrollment reporting for non-funded Small Business Programs (Incubator, Business Development, Management Development) which provide training to small businesses and aspiring entrepreneurs.

30. *New* – added to TIG, TIP and FFT process under "Technology Center will:"
    Technology Center Coordinator will complete an EDI Training Budget Proposal, using the appropriate fiscal year worksheet at https://www.okcareertech.org/about/state-agency/divisions/imd/ctims/FY21Worksheet.xlsx and email to appropriate Regional Coordinator for review and approval prior to entering Worksheet in CTIMS.

31. *New* OkPTAC Type Code 79 - Replaces OBAN (Oklahoma Bid Assistance Network) with **new name**: Oklahoma Procurement and Technical Assistance Center (OkPTAC)

32. *Added* to **Safety Grants** and **Incubator Grants** –

Once the allocation is made in CTIMS, the Technology Center will have 15 calendar days to create an Agreement in CTIMS. Once a P.O. is issued by ODCTE in CTIMS, the Technology Center has 60 calendar days to initiate the purchase or the funding will be eligible for reallocation to other Tech Centers.

33. *Modified* "Incubators" section to distinguish between reporting consulting hours and Incubator Grant description
34. *Removed* **Innovation Grants** as funding has not been available for over 5 years
35. *Added to Appendix* - links to CTIMS EDI Process Guidebook and CTIMS EDI Approval Process Overview
36. – CTIMS EDI Approval Process Overview