

**Guidelines For  
Technical Institutes**

**A Technical Assistance Manual**

**Prepared by  
Pennsylvania Department of Education  
Bureau of Career and Technical Education**

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Commonwealth of Pennsylvania  
Edward G. Rendell, Governor

Department of Education  
Thomas E. Gluck, Acting Secretary

Office of Elementary and Secondary Education  
Diane Castelbuono, Deputy Secretary

Bureau of Career and Technical Education  
Lee Burket, Director

Division of Adult and Postsecondary CTE  
Lydia Hess, Manager

Compiled by:  
David C. Garnes, CTE Advisor  
Pennsylvania Department of Education  
333 Market Street  
Harrisburg, PA 17126-0333

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If you have any questions about this publication, or for additional copies, contact: Bureau of Career and Technical Education, Division of Adult and Postsecondary CTE, Attention: David C. Garnes, 333 Market Street, 11th Floor, Harrisburg, PA 17126-0333. Voice (717) 783-6859; TTY (717) 783-8445; Fax (717) 783-6672; or e-mail [dgarnes@state.pa.us](mailto:dgarnes@state.pa.us).

**The following persons have been designated to handle inquiries regarding the Pennsylvania Department of Education's nondiscrimination policies:**

**For Inquiries Concerning Non-Discrimination in Employment:**

Pennsylvania Department of Education  
Equal Employment Opportunity Representative  
Bureau of Human Resources  
333 Market Street, 11th Floor  
Harrisburg, PA 17126-0333  
Voice Telephone: (717) 787-4417  
Text Telephone: (717) 783-8445  
Fax: (717) 783-9348

**For Inquiries Concerning Non-Discrimination in All Other Pennsylvania Department of Education Programs and Activities:**

Pennsylvania Department of Education  
School Services Unit Director  
333 Market Street, 5th Floor  
Harrisburg, PA 17126-0333  
Voice Telephone: (717) 783-3750  
Text Telephone: (717) 783-8445  
Fax: (717) 783-6802

### **Forward**

This manual is intended to serve as a source of information for administrators and boards of school directors regarding the organization of technical institutes and the administration of adult career and technical education.

The references in this manual are to the Public School Code of 1949, the Act of March 10, 1949, P.L. 30, State Board of Education Regulations (22 Pa. Code Chapter 4) and Pennsylvania Department of Education Regulations (22 Pa. Code Chapter 339).

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## INTRODUCTION

The operating board of an area vocational technical school (AVTS) or career and technical center (CTC) may apply for and attain Technical Institute (TI) status from the State Board for Vocational Education. Applicable statutes and regulations authorize the establishment and operation of TIs to offer post high school programs, the purpose of which is to prepare out-of-school youths and adults for occupations requiring technical training.

This document serves as a guide related to the process and procedures to apply for TI status. Related definitions can be found in Appendix A.

### I. LEGAL BASIS

#### Authorization

The Pennsylvania Public School Code authorizes an AVTS/CTC Board or several AVTS/CTC boards to establish, maintain, conduct and operate TIs. TI attendance areas shall be in conformity with standards prepared by the Department of Education (Department) and approved by the State Board for Vocational Education. 24 P.S. § 18-1841. Those standards are outlined in 22 Pa. Code Chapter 339 and this document.

TIs, as approved by the State Board for Vocational Education, exist to serve out-of-school youth and adults either on a full-time or part-time basis. The program length is not to exceed two years. TIs are not authorized to grant degrees, but students completing a TI course or program will earn technical certificates. TIs are required to develop articulation agreements with degree-granting institutions to facilitate transfer of student credit. 24 P.S. § 18-1841; see also 22 Pa. Code § 339.56(e).

#### Formation of Technical Institutes (24 P.S. §§ 18-1841 and 18-1844)

Technical Institutes can be formed in one of two ways. The first way is for the AVTS/CTC Board to complete the forms found in Appendices F-O. The Pennsylvania Public School Code authorizes an AVTS/CTC Board or several AVTS/CTC boards to establish, maintain, conduct and operate TIs. 24 P.S. § 18-1841.

Additionally, the Intermediate Unit (“IU”) board of directors may call a convention of school directors of all school districts in the IU to discuss and vote upon the establishment of a TI. The IU board of directors may also call for an election by the school directors of the districts within an attendance area to determine if a TI shall be established. If a convention or election is called by the IU, the IU board of directors has the responsibility to certify the results of the election and to document the number of votes that support and do not support the establishment of a TI. Once the IU has recorded and certified the votes, the IU must provide the certified results to the Department. If the majority of school districts vote in favor of establishing a TI, the IU shall proceed to act as the agency to initiate the final procedures necessary to organize and establish the TI in the attendance area. The procedures include the coordination of the drafting of the TI Articles of Agreement and the adoption of such agreement. *See* Appendix C.

### **Nonparticipating School Districts (24 P.S. § 18-1844)**

If a school district does not want to participate in the establishment of a TI, it has the opportunity at a later date to become a participating district. The TI Articles of Agreement shall contain direction related to the terms and conditions to be followed for the inclusion of a new district as a participating district.

### **First Class School Districts (24 P.S. § 18-1844)**

The Boards of Education of school districts of the first class can by majority vote establish a TI. If the majority vote supports establishment of a TI, the school board shall seek approval of the TI from the State Board for Vocational Education.

### **Cost of Establishment (24 P.S. § 18-1845)**

Any costs that are associated with establishing and later improving or adding to the TI are the responsibility of the school districts participating in the TI. The costs shall be shared in the proportion agreed upon by the participating school districts.

If at a later time a nonparticipating school district decides to participate in the TI, it must contribute to the cost of the TI. Each of the participating school districts agrees on the amount that the nonparticipating school district must contribute. The nonparticipating school district is also obligated to make annual payments for any obligations remaining to the State Public School Building Authority or any rentals under leases with municipality authorities. Again, this is agreed upon by the participating school districts.

All property of the TI shall be jointly owned by the school districts participating in the TI, in the proportion of each school district's contribution to the cost.

### **Attendance of Students from Nonparticipating Districts (24 P.S. § 18-1847)**

A pupil who wishes to enroll in a TI, but whose residence is in a school district that does not participate in a TI, must obtain the consent of the TI board in which he or she wishes to enroll prior to enrolling in the TI. The consent of the board of school directors of the school district in which the pupil resides is not necessary for enrollment.

### **Organization and Operation of the TI (24 P.S. § 18-1850.1)**

The operation of a TI is the responsibility of the boards of school directors of those districts participating in the TI. The TI board will be comprised of representatives from each of the participating school districts. The participating districts begin this relationship by developing a written agreement that establishes the TI. The written agreement will be called the Articles of Agreement and shall address the rights and obligations of each participating district and the TI board. *See Appendix C.* The Articles of Agreement cannot be changed unless each participating

school district agrees, by the affirmative vote of a majority of the school directors, to make a change.

The TI board has the following authority and duties:

1. To provide for the assumption of obligations that include, but are not limited to, operating expenses, architect's fees, engineering costs, professional salaries, expenses of acquiring and maintaining sites for the TI;
2. To formulate and adopt policies relating to the organization, establishment and operation of the TI;
3. To provide for the administration and operation of the TI;
4. To adopt the budgets for operation of the TI pursuant to 24 P.S. § 6-687;
5. To designate a superintendent of the TI provided that a chief school administrator of a participating school district shall be designated as superintendent of the TI;
6. To exercise all the powers, perform the duties and be subject to all liabilities with reference to the operation of TIs;
7. To conduct surveys to determine the current vocational and technical needs of the participating school districts;
8. To make and establish and from time to time alter and amend, rules and regulations for the transaction of its business for the administration of the work under its charge;
9. To employ all persons necessary to carry on TIs and to determine the salaries to be paid;
10. To purchase, lease, rent, improve and sell land, and to build, repair, improve, lease, rent, buy and sell buildings;
11. To acquire real property by purchase, gift or condemnation. Such condemnation proceedings shall be instituted and conducted by the TI board in the name of the participating school districts in the same manner and with the like authority as provided by law in the case of school districts. The title to any real estate, acquired for the purpose of establishing any such TI, shall be held in the name of one or more of the school districts that established the TI, as they may agree;
12. To purchase, lease, rent or otherwise acquire all necessary furniture, implements, books, materials, equipment and supplies;
13. To make contracts with counties, cities, boroughs, towns, townships, school districts, other political subdivisions, community colleges, public and private agencies, quasi-public

agencies, nonprofit corporations, the Federal government and its agencies and instrumentalities, municipalities and other public authorities or other persons;

14. To make an annual report, in writing, to the Department and such other reports as the Department may require;
15. To adopt criteria for admitting students to the TI;
16. To receive Federal, State, school district and other public and private funds and to expend such funds to establish, operate, improve and expand TIs;
17. To enter into agreement with the State Public School Building Authority, municipal authorities, political subdivisions, municipal corporations, public and private agencies, quasi-public agencies, authorities, nonprofit corporations and the Federal Government and its agencies and instrumentalities to buy land, build, alter, lease, equip and operate facilities for public TIs. The participating school districts must authorize this authority for the TI board;
18. To prepare and submit to the Department, on or before July 1 of each year, for approval, a budget of proposed expenditures for the TI for the ensuing year;
19. To accept pupils in the TI from districts not participating in their establishment and maintenance and to establish tuition for charges therefore;
20. To assign pupils residing within school districts participating in the TI to TIs maintained by other TI boards and school districts with the approval of the TI and the district boards maintaining such TI programs, and to pay tuition for pupil permitted to attend such TI;
21. To locate TIs;
22. To collect tuition and fees;
23. To do all things necessary to carry into effect the purposes of Article 18 of the Pennsylvania Public School Code of 1949;
24. To prepare an estimate of the total cost of and expenditures to be made on account of the TI for the following year. The estimates must be filed with the Department of Education no later than July 1 of each year for the approval of the Department and
25. To establish capital reserve funds for the purposes of purchasing equipment and maintaining facilities. The participating school districts must authorize the TI board to establish the reserve funds.

All actions of the TI board shall be by a majority vote of the members of the board either in convention or by mail ballot, whichever procedure the board shall elect: Provided, that the approval of each operating budget shall require an affirmative vote of two-thirds of the participating school districts and a majority vote of all the school directors of all participating

districts and provided further, for purposes of this requirement only, the vote of any participating school district shall be determined by a majority vote of all school directors comprising such participating boards. All votes shall be duly recorded and shall show how each member voted.

A TI board shall have power to delegate the operation, administration and management of the school or institute: (1) to one or more county boards of school directors acting as agent for the TI board or (2) to a joint committee elected from among the several participating boards of school directors.

**Operation by Intermediate Unit Board of Directors Acting as Operating Agent (24 P.S. § 18-1850.2)**

When the TI board designates the IU board to operate, administer and manage the TI, the IU board shall discharge its duties in accordance with a written agreement entered into by the TI board and the IU board. The written agreement shall provide the IU board the power and authority to operate, administer and manage the TI given by law to the TI board and shall provide that the IU board shall conduct the affairs of the TI within the limits of the budget adopted by the TI board.

The TI board may not delegate the following powers to the IU board:

1. To provide for the assumption of obligations that include, but are not limited to, operating expenses, architect's fees, engineering costs, professional salaries, expenses of acquiring and maintaining sites for the TI;
2. To adopt the budgets for operation of the TI pursuant to 24 P.S. § 6-687;
3. To acquire real property by purchase, gift or condemnation. Such condemnation proceedings shall be instituted and conducted by the TI board in the name of the participating school districts in the same manner and with the like authority as provided by law in the case of school districts. The title to any real estate acquired for the purpose of establishing any such TI shall be held in the name of one or more of the school districts that established the TI, as they may agree;
4. To receive Federal, State, school district and other public and private funds and to expend such funds to establish, operate, improve and expand TIs;
5. To prepare and submit to the Department on or before July 1 of each year, for approval, a budget of proposed expenditures for the TI for the ensuing year;
6. To locate TIs and
7. To prepare an estimate of the total cost of and expenditures to be made on account of the TI for the following year. The estimates must be filed with the Department no later than July 1 of each year for the approval of the Department.

The TI board may not delegate the following powers to the IU board, unless the items are fully provided for within the current budget.

1. To employ all persons necessary to carry on TIs and to determine the salaries to be paid;
2. To purchase, lease, rent, improve and sell land, and to build, repair, improve, lease, rent, buy and sell buildings;
3. To purchase, lease, rent or otherwise acquire all necessary furniture, implements, books, materials, equipment and supplies;
4. To make contracts with counties, cities, boroughs, towns, townships, school districts, other political subdivisions, community colleges, public and private agencies, quasi-public agencies, nonprofit corporations the Federal government and its agencies and instrumentalities, municipalities and other public authorities or other persons.

### **Operation by a Joint Committee (24 P.S. § 18-1850.3)**

When a joint committee is selected to operate a TI, it shall be known as the TI joint committee.

The membership of the TI joint committee shall be determined by the agreement of the participating school district boards. Each participating school district shall have at least one member on the TI joint committee.

Each participating school board shall elect one or more of its member to serve on the TI joint committee. The elected TI joint committee members shall serve for a three year term commencing the day of their election. The election occurs during the month of December. However, in the first election the terms of office of one-third of the members shall expire at the end of the first year, the terms of the office of one-third of the members shall expire at the end of two years and the terms of office of the remaining one-third shall expire at the end of the third year. The length of the terms of office of the initial members shall be determined by the casting of lots.

Each year, during the month of December, the joint committee shall choose from its members a chairperson and vice chairperson, each to serve for one year. During the month of May, annually the joint committee elects a treasurer to serve for one year, beginning the first Monday in July following such election. During the month of May, once every four years, the joint committee elects a secretary who may or may not be a member of the TI board. The secretary serves for a term of four years beginning the first Monday of July following the election. The joint committee shall elect interim officers to serve until the first regular December and May election meetings.

### **Ability to Levy Taxes**

A school district cannot obtain a referendum exception for the debt associated with the establishment of a TI; therefore, if a district wants to fund debt for a TI, as a general matter it must either fund construction costs within its index (meaning it must pay for the costs through a budget with an at-or-below-index tax increase) or it may seek voter approval to take on debt and allow it to increase taxes above the index.

One exception would be if a school district obtained a small increase above its index to “pay interest and principal on indebtedness for up to \$250,000 of the construction cost of a nonacademic school construction project...” 53 P.S. § 6926.333(f)(2)(iii)(D).

### **Contracts to Lease ( 24P.S. § 18-1853)**

A TI board can enter into contracts with the State Public School Building Authority, the General State Authority, municipal authorities, nonprofit corporations, municipal corporations, political subdivisions, public and quasi-public and private agencies, Federal Government and its agencies and instrumentalities to lease lands and buildings for the purpose of operating the TI.

### **Advisory Committees (24 P.S. § 18-1842)**

Each TI shall appoint an advisory committee composed of representatives of local trades, industries, business research and educational agencies, occupations and administrators of the participating school districts. The advisory committee shall advise the TI board on such matters as the need for a particular program, laboratory, occupation, equipment, curriculum, labor management coordination, business and industrial requirements or selection of personnel.

### **Payments on Account of Students Enrolled in Technical Institutes (24P.S. § 25-2504.3)**

The Commonwealth will pay every school district that has out-of-school youth or adults enrolled in a TI for each pupil in average daily membership one-third the total current expenses per pupil as provided in the approved budget, or the per pupil cost for current expense, whichever is less. The remainder of the cost of total current expenses may be borne by the district of residence or by the district of residence and the pupil. However, in no event shall the pupil bear more than one-third of the total current expense per pupil.

Payment to the TI will be made by the Department. Reimbursement will be made in the subsequent State fiscal year and based upon data supplied to the Department by the TI.

## **II. APPLICATION FOR ESTABLISHMENT (22 Pa. Code § 339.57)**

The Department has developed forms that a TI board must complete when seeking establishment of a TI.

Each TI application must include the following information and submit on the applicable form.

- I. Statement of philosophy
- II. Strategic plan
- III. Local advisory committee
- IV. Nondiscriminatory written admissions policies
- V. Guidance counseling, placement and financial aid information

### **I. Statement of Philosophy**

A statement of philosophy documents how the mission of the TI fulfills the educational needs of the Commonwealth.

**Guidelines for Writing the Statement of Philosophy.** Include the completion of each item listed below, supported with documentation/evidence that each item was fully investigated in writing the statement of philosophy. Each item is followed by questions to help guide the writing. Applications are to include the form found in Appendix F.

#### **1. Establishes the future direction for the TI.**

- a. What is the TI's official vision and mission that clearly reflects its overall purpose of existence and includes technical education in its scope?
- b. Are the overall vision and mission and TI services planned to be communicated to key stakeholders such as employers, community organizations, faculty/staff and adult students?
- c. Are the TI's overall vision and mission and operation based on community needs and expectations of key customers and based on current data and information?
- d. Does the TI's strategic plan establish goals and objectives that include strategies for technical education and are the goals timely and futuristic in scope?
- e. What are the TI's key strategic objectives, action plans and timetables for accomplishing these objectives?
- f. What are the TI's key measurements and performance indicators and targets that will identify successful completion of the strategic plan objectives?

### **II. Strategic Plan**

The strategic plan shall include: (a) a needs assessment, (b) an action plan, (c) coordination and articulation of the TI programs to secondary, postsecondary, adult and apprenticeship programs, (d) professional staff development, (e) job placement services and (f) instructional equipment updates.

**Guidelines for Writing the Strategic Plan.** Includes the completion of each item listed below, supported with documentation/evidence that each item was fully investigated in writing the strategic plan. Each item is followed by questions to help guide the writing. Applications are to include the form found in Appendix G.

#### **A. Needs Assessment**

The first requirement to be included in the initial discussion(s) when contemplating the formation a TI is for those interested schools to conduct a needs assessment. The needs assessment guidelines presented below focus on the needs assessment areas to be considered when establishing a TI. Because a TI is addressing the educational and training needs of the Commonwealth, a labor market needs assessment is required. Potential student needs also must be considered and incorporated into the needs assessment.

**Guidelines for Writing the Needs Assessment.** Include the completion of each item listed below, supported with documentation/evidence that each item was fully investigated in determining the need to establish a TI. Each item is followed by suggested documentation or evidence that should be included with the application. Applications are to include the form found in Appendix G.

#### **1. Labor Market Needs Assessment**

- a. Describe the current labor market data, which supports the establishment of a TI.
- b. Describe how the TI will partner with local business and industry and workforce development stakeholders so that the stakeholders and the TI benefit from the TI.

#### **Evidence includes:**

- a. Letter of support from the local Workforce Investment Board (WIB) Board.
- b. Research supported by the local WIB to evidence the labor market needs aligned to the educational areas and addresses emerging and high priority occupations (HPO).

#### **2. Student Needs Assessment**

- a. Describe how the establishment of a TI will meet the needs of the students.

#### **Evidence includes:**

- a. Surveys to community organizations soliciting the need for a TI
- b. High school student surveys, and parent surveys
- c. Minutes from existing CTC Local Advisory Committee.
- d. Survey results from the Local Advisory Committee
- e. Survey of business and industry to determine the manpower needs of employers within the local workforce investment areas
- f. Summary of existing postsecondary and higher education institutions currently serving the region, summary should include type of institution, programs and degrees offered, size and makeup of student body and institutional focus (i.e. research, liberal arts, trade, technical/occupational, etc.).
- g. Executive Summary of all Survey Results

## **B. Action Plan**

When establishing a TI, an action plan is required to be completed. The TI action plan addresses the overall description of the TI goals. The goals must relate directly to occupational objectives and exit outcomes for graduates, and indicate formal strategies and accountability plans for ensuring that all students are equipped with the academic and occupational skills they need for career success and lifelong learning.

**Guidelines for Preparing the TI Action Plan.** Include the completion of each item listed below, supported with documentation/evidence that each item was fully investigated in preparing the TI action plan. Each item is followed by suggested documentation or evidence that should be included with the application. Applications are to include the form found in Appendix H.

### **1. Action Plan Goals**

- a. Identify TI goals that correspond directly to occupational objectives and exit outcomes for graduates.
- b. Provide the overall TI goals and evidence how a standards-based philosophy has been incorporated.

#### **Evidence includes:**

- a. List of TI goals.
- b. Statement of standards-based philosophy.

### **2. Accountability**

- a. Identify formal strategies and accountability plans for ensuring that all students are equipped with the academic and occupational skills they need for career success and lifelong learning.

#### **Evidence includes:**

- a. Occupational Advisory Committee (OAC) composition.
- b. OAC minutes that address the curriculum reviews.
- c. Course description guide for each TI program.
- d. Copy of the TI's strategic plan that indicates how negotiated performance measures will be achieved and assessed.
- e. Specific academic standards identified (*i.e.* math, English, science) and integrated into the TI program.

## **C. Coordination and Articulation Plans**

The coordination and articulation section focuses on areas to be considered when establishing a TI. This section examines how the TI is coordinated and articulated with approved career and technical education at the secondary, postsecondary, adult and apprenticeship levels.

**Guidelines for Preparing the Coordination and Articulation Plans Among Secondary, Postsecondary, Adult and Apprenticeship Programs.** Include the completion of each item listed below, supported with documentation/evidence that each item was fully investigated in preparing the articulation agreements. Each item is followed by suggested documentation or

evidence that should be included with the application. Applications are to include the form found in Appendix I.

### **1. Student Attainment**

- a. Assurances made by the TI that students will demonstrate technical competence in a TI approved program.

#### **Evidence includes:**

- a. System to track and make annual reports on student achievement in the TI programs.

### **2. Postsecondary Articulation**

- a. Describe postsecondary institution participation in the TI approved programs to provide articulation opportunities for TI students desiring to enroll in postsecondary career and technical education credit bearing/awarding programs.
- b. Describe how coordination leads to a seamless system.

#### **Evidence includes:**

- a. Minutes from the Local Advisory Committee and Occupational Advisory Committee.
- b. Curriculum framework that evidences non-duplicative, seamless transition from the TI to postsecondary level based on the achievement of specified technical competencies.
- c. List of existing articulation agreements and credit awards.

### **3. Apprenticeship Articulation**

- a. Describe labor and industry participation with the TI approved programs to provide adult and apprenticeship opportunities for TI students desiring to enroll in such programs.
- b. Coordination leads to a seamless system.

#### **Evidence includes:**

- a. Minutes from the Local Advisory Committee and Occupational Advisory Committee
- b. Course handbook showing opportunities including apprenticeship.
- c. Guidance materials showing continued placement opportunities.
- d. List of existing agreements and credit awards.

### **D. Professional Development Plan**

The professional development portion of the strategic plan focuses on ensuring TI faculty are technically up-to-date and are following current andragogy practices.

**Guidelines for Preparing the Professional Development Plan.** Include the completion of each item listed below, supported with documentation/evidence that each item was fully investigated in preparing the professional development plan. Each item is followed by suggested documentation or evidence that should be included with the application. Applications are to include the form found in Appendix J.

### **1. Professional Development**

- a. Describe a continuing education plan for professional staff development designed cooperatively by administrators. The plan should ensure that professional personnel will

keep current with the technology practices and standards of their professional areas per connected to industry expectations and workforce practices.

**Evidence includes:**

- a. List of goals for professional staff development.
- b. List of objectives for staff development.
- c. List of activities and resources required to achieve each goal.
- d. Timeline for each goal.

**E. Job Placement Plan**

The strategic plan must also address how the TI will provide placement services to its graduates. Placement includes placement into jobs and continuing education such as apprenticeship, community colleges and universities.

**Guidelines for Preparing the Job Placement Plan.** Include the completion of each item listed below, supported with documentation/evidence that each item was fully investigated in preparing the job placement plan. Each item is followed by suggested documentation or evidence that should be included with the application. Applications are to include the form found in Appendix K.

**1. Placement Services**

- a. Describe a placement services plan for graduates of the TI programs. The plan should ensure that graduates are prepared academically and technically for continued career success and lifelong learning. The plan should describe how qualified advisers counsel TI students on how and where to find jobs and assist in placement in occupations related to the students' training and life experience.

**Evidence includes:**

- a. List of goals for placement.
- b. List of objectives for placement.
- c. List of activities and resources required to achieve each goal.
- d. Timeline for each goal.

**F. Instructional Equipment Update Plan**

The TI strategic plan must address the repair, replacement and addition of instructional equipment. Action plans must include formal strategies and accountability plans for ensuring that all students are using equipment that is meeting industry expectations.

**Guidelines for Writing the Instructional Equipment Plan.** Include the completion of each item listed below, supported with documentation/evidence that each item was fully investigated in preparing the instructional equipment plan. Each item is followed by suggested documentation or evidence that should be included with the application. Applications are to include the form found in Appendix L.

**1. Instructional Equipment Updates**

Describe a plan for repairing, replacing and purchasing instructional equipment. The plan should ensure that students have access to functioning and relevant industry recognized equipment. The plan should describe how adequate funds are made available for purchasing and replacing equipment, tools, materials and supplies in accordance with the institution's planning objectives and acceptable business and industry practices to ensure safe, quality and effective TI programs. Describe how the equipment, tools, materials and supplies meet the competency based instructional needs of the curriculum (e.g., hand tools, computers, computer software, audiovisual equipment, reference materials and consumable materials). Describe how the quality and quantity of training stations are appropriate for the number of students being served. Describe the instructional equipment inventory management plan for maintaining equipment and replacing or disposing of obsolete equipment in place. Describe how the TI acquires equipment, materials and supplies within a reasonable period of time to provide safe and quality education

**Evidence includes:**

- a. List of goals for equipment maintenance and update.
- b. List of objectives for equipment maintenance and update.
- c. List of activities and resources required to achieve each goal.
- d. Timeline for each goal.

### **III. LOCAL ADVISORY COMMITTEE**

Each TI board operating a TI shall appoint an advisory committee. The Local Advisory Committee (LAC) has the function of advising the administration of the TI concerning the needs of the TI and the needs of business and industry as they relate to strategic planning, educational planning and recruitment of personnel need for a particular program, laboratory, occupation, equipment, curriculum, labor management coordination, business and industrial requirements or selection of personnel. Membership on the committee consists of business and industry representatives, public sector employers, agriculture, labor organizations, community organizations, postsecondary education institutions, administrators of the participating school districts and the general public. The members are appointed by the TI Board. The LAC meets at least once each year and gives advice to the TI Board and the administration concerning the program of the TI, including its general philosophy, academic and other standards, strategic plans, course offerings, support services, safety requirements and the skill needs of employers.

**Guidelines for Submitting Evidence of Local Advisory Committee Involvement** includes the completion of each item listed below, supported with documentation/evidence that each item was fully investigated in forming and operating a LAC. Each item is followed by suggested documentation or evidence that should be included with the application. Applications are to include the form found in Appendix M.

#### **1. Local Advisory Committee**

- a. Membership meets the regulatory requirements.

**Evidence includes:**

- a. List of committee members.

- b. Projected schedule of meetings.
- c. Projected agenda and minute format for LAC meetings.

## **2. LAC Meetings**

- a. Provide documentation that meetings of the LAC will provide advice to the TI Board and the administration concerning TI programs including its general philosophy, program standards, course offerings, support services, safety requirements, and the skill needs of employers.

### **Evidence includes:**

- a. Projected LAC meeting agendas.
- b. Projected LAC meeting minute format.

## **IV. NONDISCRIMINATORY WRITTEN ADMISSION POLICIES**

Each TI board will develop an admissions policy that is nondiscriminatory and which ensures students are admitted based on ability to benefit from the programs. When the number of students applying for admissions exceeds the available number of openings the policy must include a nondiscriminatory selection procedure. The admissions policy must be publicized.

TI publications including guidance, course selection and TI marketing materials must exemplify freedom from occupational stereotypes and to the extent possible the philosophy of equal access.

**Guidelines for Submitting Evidence of Nondiscriminatory Admission Policies.** Include the completion of each item listed below, supported with documentation/evidence that each item was fully investigated in preparing the admissions policy. Each item is followed by suggested documentation or evidence that should be included with the application. Applications are to include the form found in Appendix N.

### **1. TI Admissions**

- a. The TI admissions handbook, course announcements, materials, brochures and similar materials convey the philosophy of equal access to students considering enrollment in a TI approved program.

### **Evidence includes:**

- a. Copy of student handbook.
- b. Copy of admissions policy.
- c. Copy of marketing materials.
- d. Copy of course selection materials.

## **V. GUIDANCE COUNSELING, PLACEMENT AND FINANCIAL AID INFORMATION**

The purpose of the career advisement services is to promote equal opportunity for the students enrolled in the TI programs. Services should be provided to students to assist them in selecting the most appropriate TI program, develop career plans, provide career and occupational opportunities upon graduation, maintain educational records, provide orientation programs for

newly admitted students, placement services to students graduating and conduct follow up studies to determine the effectiveness of the TI program and services.

**Guidelines for Submitting Evidence of Career Counseling Services.** Include the completion of each item listed below, supported with documentation/evidence that each item was fully investigated in preparing a career advisement services plan. Each item is followed by suggested documentation or evidence that should be included with the application. Applications are to include the form found in Appendix O.

**1. Career Counseling Services**

- a. A Career Advisement Services plan exists and addresses provisions for student support offered to students enrolled in TIs.

**Evidence includes:**

- a. Copy of the Career Advisement Services Plan.
- b. Copy of financial aid information provided to students, parents and community.
- c. Well-defined course descriptions that reflect the overall objectives of the course and relationship of how the course content relates to occupational skills.
- d. Recruitment materials that offer a broad range of career opportunities.
- e. Materials evidence equal opportunities to participate in all activities regardless of race, color, national origin, age, gender or disability.
- f. Admissions policies and guidelines clearly stated and published.
- g. Materials exist that are made available to all students prior to enrollment and include such items as: prerequisites for enrollment, expectations for successful completion of a course, the type of report/feedback or grading system used, individual help/coaching available during the course, ethical responsibilities of the student, the type of certificate(s) students may earn, and articulation opportunities to postsecondary institutions.
- h. Where applicable, projected enrollment and class sizes are in compliance with state standards.
- i. The institution informs students of the cost of the program and of any required equipment and supplies.
- j. Financial aid information, which is available to each individual.
- k. Institutional materials informing students of those receiving postsecondary institutions that are PDE Prior Learning Assessment (PLA) Institutions and participate in PLA.

## DEFINITIONS

*Articulation*— A planned process of curriculum development, instructional strategies and administrative procedures, which link educational agencies with other education agencies or with industries. The linkage helps students make a transition from a school entity to another school entity, college or university or a business/industry without experiencing delays in or duplication of learning.

*Attendance area*— A geographical area of school districts and pupils to be served by an AVTS/CTC or a TI, which has been approved by the State Board for Vocational Education.

*High-priority occupation*—An occupation as defined by the Center for Workforce Information and Analysis within the Department of Labor and Industry, or another occupation determined to meet regional workforce needs as documented through collaboration between the TI and one or more employers and approved by the Department.

*Industry standards*—Standards established by State or National trade or professional organizations or State or Federal regulatory bodies accepted by the Department that describe what learners should know and be able to do and describe how well learners should know or be able to perform a task in a specific occupation.

*Out-of-school youth*—Persons 16 years of age or older who have left full-time school without receiving a secondary school diploma or its recognized equivalent.

*Prior Learning Assessment*—is the evaluation for college credit of the knowledge and skill one gains from life experiences (or from non-college instructional programs) including employment, parenting, travel, hobbies or volunteer services.

*Program accrediting authority*—A regional or national industry-recognized agency or organization that certifies that a program meets education or training standards specific to the industry.

*Registered apprenticeship*—A training plan registered with the Apprenticeship and Training Council of the Commonwealth (Council) and evidenced by a Certificate of Registration or other appropriate document as meeting the apprenticeship standards of the Council.

*State plan*—A plan submitted by the Department and approved by the Federal Government in accordance with the Carl D. Perkins Career and Technical Education Improvement Act of 2006 (20 U.S.C. § § 2301—2471), or its successor.

*TI—Technical institute*—An institute established, maintained, conducted and operated for the purpose of offering nondegree-granting post high school programs and courses of not more than two years' duration, which prepare out-of-school youth and adults for technical areas leading to technical certificates.

*TI Board*—An existing AVTS/CTC board, or several AVTS/CTC boards, that agree to provide for, establish, maintain, conduct and operate a TI.

**RECORD OF CONVENTION VOTE**  
**ON**  
**ESTABLISHMENT OF A TECHNICAL INSTITUTE**

\_\_\_\_\_ Attendance Area

Do you favor the establishment and operation of a Technical Institute in the attendance area?

Total Board Members	School District	Yes	No	Absent	Date of Vote*
_____	_____	___	___	___	_____
_____	_____	___	___	___	_____
_____	_____	___	___	___	_____
_____	_____	___	___	___	_____
_____	_____	___	___	___	_____
_____	_____	___	___	___	_____
_____	_____	___	___	___	_____
_____	_____	___	___	___	_____
_____	_____	___	___	___	_____

Total                    \_\_\_    \_\_\_    \_\_\_\_\_

\_\_\_\_\_ Board of School Directors

President: \_\_\_\_\_

Secretary: \_\_\_\_\_

\* Use date column if IU board calls for an election, as opposed to a convention.

## ARTICLES OF AGREEMENT

### **Articles of Agreement Sections**

Articles of Agreement are generally drafted in two sections. The two sections are: (a) establishment and (b) operation.

The purpose of the Agreement is to outline the rights and obligations of the participating districts in the organization and establishment of the TI. *See* Appendix D.

### **Establishment Section**

The purpose of the TI establishment section of the articles of agreement is to present the rights and obligations of the member districts.

The establishment section should include information related to the formation and operation of the TI board along with its duties and a protocol for scheduling and conducting meetings. The selection of the TI board membership should also be included along with the selection and term of officers. The Articles should also provide details on the administration of the TI and the administrators' roles and positions.

Finances are another component of the establishment section and should consider lease rentals, operational costs and reimbursements. Part of the finances also includes operational costs and admission of students.

Finally, the effective date and length of the Articles should be addressed in the establishment section.

### **Operation Section**

The operation section outlines the responsibilities and the relationships between the TI board(s) and the operating agent.

The following are suggested items for development in an operation section of the Articles. The section should cover the TI officers and membership and protocol for establishing TI Board meetings and special meetings. The delegated responsibilities of the TI Board, including the process for the annual budget adoption, should be developed.

Additionally, the operation section may address items such as student tuition, operating payments, contracted services, a district's withdrawal from participation in the TI and disposition of real property.

### **Developing the Articles of Agreement**

1. Conduct a preliminary meeting with the assigned Department TI Coordinator and administrators of participating school districts to discuss ideas to be incorporated in the articles of agreement.
2. Determine the type of operating agent: Intermediate Unit or Joint Committee.

3. Prepare a preliminary draft of the Articles.
4. Review and revise the Articles with school administrators and representatives of the school boards.
5. Have a representative group of solicitors review the preliminary draft for compliance with the School Code.
6. Present the final draft to all participating school districts for review.
7. Submit two signed copies of the officially adopted articles of agreement to the Technical Institute State Coordinator, BCTE, Department of Education.
8. Await letter of approval from the Department's Director of Career and Technical Education.

### **Agreement Revision**

When changes to an agreement are anticipated, the Department assigned TI Coordinator should be involved. Revised articles of agreement must be approved by the Department's Director of Career and Technical Education. Approval of revised articles follows the same procedure as with the initial approval.

### **Technical Institute Establishment Agreement Signatures**

All agreements should be reviewed and approved by the TI board. Approval should be based upon the recommendation of the TI solicitor, before being signed by the president and secretary of the board. *See* Appendix E.



WHEREAS, the School Directors of the aforesaid school districts desire to provide the best possible educational opportunities for out-of-school youth and adults; and

WHEREAS, it is recognized that Technical Institute facilities can be erected, equipped and operated more equitably and economically on a cooperative basis; and

WHEREAS, it has been deemed desirable to provide vocational technical/career and technical education to out-of-school youth and adults in the aforesaid school districts:

NOW THEREFORE BE IT AGREED by and between the aforesaid School Districts as follows:

DEFINITIONS: For the purpose of this agreement, the following definitions shall apply:

Participating School District shall mean a school district whose Board members have authorized the district, by resolution approved by a majority vote of the school directors, to become a party to this agreement.

TI-Technical institute shall mean an institute established, maintained, conducted and operated for the purpose of offering nondegree-granting post high school programs and courses of not more than two years' duration, which prepare out-of-school youth and adults for technical areas leading to technical certificates.

TI Board shall mean existing AVTS/CTC, or several AVTS/CTC boards, that agree to provide for, establish, maintain, conduct and operate the \_\_\_\_ Technical Institute.

#### ORGANIZATION

The board of school directors which are parties to this agreement do hereby organize and establish the \_\_\_\_\_ Technical Institute with facilities and programs located in the \_\_\_\_\_ school. (Schools) and or at other sites which may be determined at a later time, to be known as the:

\_\_\_\_\_ Technical Institute, and herein referred to as the TI.

#### AUTHORITY OF THE BOARD

The TI board shall, by a majority vote of all its voting members and by a concurring vote of the board of the participating districts, have authority and its duties shall be to purchase land, adopt the annual budget, amend this agreement and other responsibilities which the area board may not lawfully delegate or does not wish to delegate, as particularly set forth in Article 18 of the Pennsylvania Public School Code, as amended from time to time.

### THE OPERATING AGENT

The \_\_\_\_\_ TI board shall delegate the operation, administration and management of the school to a joint committee comprised of members selected from the incumbent school directors of the participating school districts.

### ANNUAL BUDGET ADOPTION

All operations of the school shall be within the limits of the budget adopted in accordance with Sections 687 and 1850.1(c) of the Pennsylvania Public School Code.

### RENTAL

The rental of buildings or equipment, the purchase of equipment, the purchase and improvement of land and expenditures related to the construction, remodeling or alteration of a building shall be determined by the site formula for construction of a TI.

### EXISTING EQUIPMENT

A participating school district having equipment satisfactory for transfer to the TI shall be reimbursed the appraised value of the equipment, as determined by two recognized equipment appraisers. However, any equipment which was acquired by a participating school district as State and/or Federal surplus equipment or purchased with State or Federal funds, shall be valued and reimbursed not by the forgoing appraisal method, but on the basis of the school district's actual cost of acquisition, and the transportation charges incident thereto, and of repairs meanwhile, plus 10% overhead charge, less 5% depreciation up to 15 years of service to the participating school district.

### FEDERAL GRANTS

The TI board may apply on behalf of the participating school districts for any federal grants for building, construction and payment may be made directly to the applicant.

### PRORATING OPERATING EXPENSES

The current operating expenditures shall be allocated to and paid by the participating school districts in the same ratio that the average daily membership of pupils in the TI from each participating school district bears to the aggregate average daily membership of all pupils who participated in the TI program computed at the end of the school year in which the expenditures are made.

ADDITIONAL DISTRICTS

Additional school districts may be admitted as participating school districts on terms to be agreed upon with the then participating school districts.

EFFECTIVE DATE AND TERM

This agreement shall become effective \_\_\_\_\_ and shall remain in effect until all obligations for financing the construction, remodeling or alteration of the TI, and all obligations created therewith or in the financing of any subsequent capital expenditures shall have been paid in full.

AMENDMENTS TO AGREEMENT

This agreement may be amended by the participating school districts in the same manner in which the agreement was adopted.

AGREEMENT ADOPTION

This agreement shall be adopted by a majority vote of the respective school board of the participating school districts at a meeting duly held for this purpose, and the action duly entered upon the minutes of the respective school districts.

**INTENT TO SIGN AGREEMENT**

Resolve that the Articles of Agreement for establishing and operation of the \_\_\_\_\_ Technical Institute in the form presented at this meeting be, and the same hereby, approved and accepted by the School District of the \_\_\_\_\_ of \_\_\_\_\_ and that the proper officers are hereby authorized to execute copies of the same on behalf of the school district; and;

Be it further resolved that the secretary be authorized and directed to send a certified copy of this resolution to the \_\_\_\_\_ Board of School Directors.

Resolved this \_\_\_\_\_ day of \_\_\_\_\_ A.D. 20\_\_\_\_\_

**CERTIFICATION**

I, the undersigned Secretary of the School District of the \_\_\_\_\_ of \_\_\_\_\_ do hereby certify that the foregoing is a true and correct copy of a resolution duly adopted by the Board of School Directors of such district at a meeting duly held the \_\_\_\_\_ day of \_\_\_\_\_ A.D. 20\_\_\_\_\_ at which meeting a quorum of directors was present and \_\_\_\_\_ directors voted against \_\_\_\_\_ directors voted for and \_\_\_\_\_ directors were recorded as not voting.

Certified to this \_\_\_\_\_ day of \_\_\_\_\_ A.D., 20\_\_\_\_\_

By \_\_\_\_\_  
(Secretary of the School District)

Affix the \_\_\_\_\_ of \_\_\_\_\_

(Corporate Seal)

**THE PENNSYLVANIA DEPARTMENT OF EDUCATION  
BUREAU OF CAREER AND TECHNICAL EDUCATION**

**Guidelines for the Technical Institute  
STATEMENT OF PHILOSOPHY FORM**

Name of TI: \_\_\_\_\_

Contact Name: \_\_\_\_\_

Contact Phone Number: \_\_\_\_\_

Contact E-Mail: \_\_\_\_\_

A statement of philosophy documents how the mission of the TI fulfills the educational needs of the Commonwealth.

**Guidelines for Writing the Statement of Philosophy.** Include the completion of each item listed below, supported with documentation/evidence that each item was fully investigated in writing the statement of philosophy. Each item is followed by questions to help guide the writing.

**1. Establishes the future direction for the TI.**

- a. What is the TI's official vision and mission that clearly reflects its overall purpose of existence and includes technical education in its scope?
- b. Are the overall vision and mission and TI services planned to be communicated to key stakeholders such as employers, community organizations, faculty/staff and adult students?
- c. Are the TI's overall vision and mission and operation based on community needs and expectations of key customers and based on current data and information?
- d. Does the TI's strategic plan establish goals and objectives that include strategies for technical education and, are the goals timely and futuristic in scope?
- e. What are the TI's key strategic objectives, action plans and timetables for accomplishing these objectives?
- f. What are the TI's key measurements and performance indicators and targets that will identify successful completion of the strategic plan objectives?

**THE PENNSYLVANIA DEPARTMENT OF EDUCATION  
BUREAU OF CAREER AND TECHNICAL EDUCATION**

**Guidelines for the Technical Institute  
STRATEGIC PLAN  
NEEDS ASSESSMENT FORM**

Name of TI: \_\_\_\_\_

Contact Name: \_\_\_\_\_

Contact Phone Number: \_\_\_\_\_

Contact E-Mail: \_\_\_\_\_

The strategic plan shall include: (a) a needs assessment, (b) an action plan, (c) coordination and articulation of the TI programs to secondary, postsecondary, adult and apprenticeship programs, (d) professional staff development, (e) job placement services and (f) instructional equipment updates.

**Guidelines for Writing the Strategic Plan.** Includes the completion of each item listed below, supported with documentation/evidence that each item was fully investigated in writing the strategic plan. Each item is followed by questions to help guide the writing.

**a. Needs Assessment**

The first requirement to be included in the initial discussion(s) when contemplating the formation a TI is for those interested schools to conduct a needs assessment. The needs assessment guidelines presented below focus on the needs assessment areas to be considered when establishing a TI. Because a TI is addressing the educational and training needs of the Commonwealth, a labor market needs assessment is required. Potential student needs also must be considered and incorporated into the needs assessment.

**Guidelines for Writing the Needs Assessment.** Include the completion of each item listed below, supported with documentation/evidence that each item was fully investigated in determining the need to establish a TI. Each item is followed by suggested documentation or evidence that should be included with the application. Applications are to include the form found in Appendix G.

**1. Labor Market Needs Assessment**

- a. Describe the current labor market data, which supports the establishment of a TI.
- b. Describe how the TI will partner with local business and industry and workforce development stakeholders so that the stakeholders and the TI benefit from the TI.

**Evidence includes:**

- a. Letter of support from the local Workforce Investment Board (WIB) Board.
- b. Research supported by the local WIB to evidence the labor market needs aligned to the educational areas and addresses emerging and high priority occupations (HPO).

## **2. Student Needs Assessment**

- a. Describe how the establishment of a TI will meet the needs of the students.

### **Evidence includes:**

- a. Surveys to community organizations soliciting the need for a TI
- b. High school student surveys, and parent surveys
- c. Minutes from existing CTC Local Advisory Committee.
- d. Survey results from the Local Advisory Committee
- e. Survey of business and industry to determine the manpower needs of employers within the local workforce investment areas
- f. Summary of existing postsecondary and higher education institutions currently serving the region, summary should include type of institution, programs and degrees offered, size and makeup of student body and institutional focus (i.e. research, liberal arts, trade, technical/occupational, etc.).
- g. Executive Summary of all Survey Results

**THE PENNSYLVANIA DEPARTMENT OF EDUCATION  
BUREAU OF CAREER AND TECHNICAL EDUCATION**

**Guidelines for the Technical Institute  
STRATEGIC PLAN  
ACTION PLAN FORM**

Name of TI: \_\_\_\_\_

Contact Name: \_\_\_\_\_

Contact Phone Number: \_\_\_\_\_

Contact E-Mail: \_\_\_\_\_

**Action Plan** (22 Pa. Code § 339.57 (a)(2))

When establishing a TI, an action plan is required to be completed. The TI action plan addresses the overall description of the TI goals. The goals must relate directly to occupational objectives and exit outcomes for graduates, and indicate formal strategies and accountability plans for ensuring that all students are equipped with the academic and occupational skills they need for career success and lifelong learning.

**Guidelines for Preparing the TI Action Plan.** Include the completion of each item listed below, supported with documentation/evidence that each item was fully investigated in preparing the TI action plan. Each item is followed by suggested documentation or evidence that should be included with the application.

**1. Action Plan Goals**

- a. Identify TI goals that correspond directly to occupational objectives and exit outcomes for graduates.
- b. Provide the overall TI goals and evidence how a standards-based philosophy has been incorporated.

**Evidence includes:**

- a. List of TI goals.
- b. Statement of standards-based philosophy.

**2. Accountability**

- a. Identify formal strategies and accountability plans for ensuring that all students are equipped with the academic and occupational skills they need for career success and lifelong learning.

**Evidence includes:**

- a. Occupational Advisory Committee (OAC) composition.
- b. OAC minutes that address the curriculum reviews.
- c. Course description guide for each TI program.

- d. Copy of the TI's strategic plan that indicates how negotiated performance measures will be achieved and assessed.
- e. Specific academic standards identified (*i.e.*, math, English, science) and integrated into the TI program.

**THE PENNSYLVANIA DEPARTMENT OF EDUCATION  
BUREAU OF CAREER AND TECHNICAL EDUCATION**

**Guidelines for the Technical Institute  
STRATEGIC PLAN  
COORDINATION AND ARTICULATION PLANS FORM**

Name of TI: \_\_\_\_\_

Contact Name: \_\_\_\_\_

Contact Phone Number: \_\_\_\_\_

Contact E-Mail: \_\_\_\_\_

**Coordination and Articulation Plans**

The coordination and articulation section focuses on areas to be considered when establishing a TI. This section examines how the TI is coordinated and articulated with approved career and technical education at the secondary, postsecondary, adult and apprenticeship levels.

**Guidelines for Preparing the Coordination and Articulation Plans Among Secondary, Postsecondary, Adult and Apprenticeship Programs.** Include the completion of each item listed below, supported with documentation/evidence that each item was fully investigated in preparing the articulation agreements. Each item is followed by suggested documentation or evidence that should be included with the application.

**1. Student Attainment**

- a. Assurances made by the TI that students will demonstrate technical competence in a TI approved program.

**Evidence includes:**

- a. System to track and make annual reports on student achievement in the TI programs.

**2. Postsecondary Articulation**

- a. Describe postsecondary institution participation in the TI approved programs to provide articulation of credit opportunities for TI students desiring to enroll in postsecondary career and technical education credit bearing/awarding programs.
- b. Describe how coordination leads to a seamless system.

**Evidence includes:**

- a. Minutes from the Local Advisory Committee and Occupational Advisory Committee.
- b. Curriculum framework that evidences non-duplicative, seamless transition from the TI to postsecondary level based on the achievement of specified technical competencies.
- c. List of existing articulation agreements and credit awards.

### **3 Apprenticeship Articulation**

- a. Describe labor and industry participation with the TI approved programs to provide adult and apprenticeship opportunities for TI students desiring to enroll in such programs.
- b. Coordination leads to a seamless system.

#### **Evidence includes:**

- a. Minutes from the Local Advisory Committee and Occupational Advisory Committee
- b. Course handbook showing opportunities including apprenticeship.
- c. Guidance materials showing continued placement opportunities.
- d. List of existing agreements and credit awards.

<p style="text-align: center;"><b>Guidelines for the Technical Institute STRATEGIC PLAN PROFESSIONAL DEVELOPMENT PLAN FORM</b></p>
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Name of TI: \_\_\_\_\_  
Contact Name: \_\_\_\_\_  
Contact Phone Number: \_\_\_\_\_  
Contact E-Mail: \_\_\_\_\_

**Professional Development Plan**

The professional development portion of the strategic plan focuses on ensuring TI faculty are technically up-to-date and are following current andragogy practices.

**Guidelines for Preparing the Professional Development Plan.** Include the completion of each item listed below, supported with documentation/evidence that each item was fully investigated in preparing the professional development plan. Each item is followed by suggested documentation or evidence that should be included with the application.

**1. Professional Development**

- a. Describe a continuing education plan for professional staff development designed cooperatively by administrators. The plan should ensure that professional personnel will keep current with the technology practices and standards of their professional areas per connected to industry expectations and workforce practices.

**Evidence includes:**

- a. List of goals for professional staff development.
- b. List of objectives for staff development.
- c. List of activities and resources required to achieve each goal.
- d. Timeline for each goal.

**Procedural Guidelines for the Technical Institute  
Professional Development Plan**

**1.1 Plan Goals-** *identify the goals for professional staff development:*

<b>1.2 Targeted Objectives</b> <i>Identify the specific objectives to be achieved:</i>	<b>1.2 Activities</b> <i>Include specific activities used for achievement of the goals and targeted objectives:</i>	<b>1.3 Resources</b> <i>Include specific resources used for achievement of the goals and targeted objectives:</i>	<b>1.4 Timeline</b> <i>Include specific dates for the achievement of targeted objectives:</i>

**THE PENNSYLVANIA DEPARTMENT OF EDUCATION  
BUREAU OF CAREER AND TECHNICAL EDUCATION**

**Guidelines for the Technical Institute  
STRATEGIC PLAN  
JOB PLACEMENT PLAN FORM**

Name of TI: \_\_\_\_\_

Contact Name: \_\_\_\_\_

Contact Phone Number: \_\_\_\_\_

Contact E-Mail: \_\_\_\_\_

**Job Placement Plan**

The strategic plan must also address how the TI will provide placement services to its graduates. Placement includes placement into jobs and continuing education such as apprenticeship, community colleges, and universities.

**Guidelines for Preparing the Job Placement Plan.** Include the completion of each item listed below, supported with documentation/evidence that each item was fully investigated in preparing the job placement plan. Each item is followed by suggested documentation or evidence that should be included with the application. Applications are to include the form found in Appendix K.

**1. Placement Services**

- a. Describe a placement services plan for graduates of the TI programs. The plan should ensure that graduates are prepared academically and technically for continued career success and lifelong learning. The plan should describe how qualified advisers counsel TI students on how and where to find jobs and assist in placement in occupations related to the students' training and life experience.

**Evidence includes:**

- a. List of goals for placement.
- b. List of objectives for placement.
- c. List of activities and resources required to achieve each goal.
- d. Timeline for each goal.

**Procedural Guidelines for the Technical Institute  
Job Development Plan**

**1.1 Plan Goals-** *identify the goals for continuous job placement services:*

<b>1.2 Targeted Objectives</b> <i>Identify the specific objectives to be achieved in the plan for continuous job placement service:</i>	<b>1.3 Activities</b> <i>Include specific activities used for achievement of the goals and targeted objectives:</i>	<b>1.3 Resources</b> <i>Include specific resources used for achievement of the goals and targeted objectives:</i>	<b>1.4 Timeline</b> <i>Include specific dates for the achievement of targeted objectives:</i>

**THE PENNSYLVANIA DEPARTMENT OF EDUCATION  
BUREAU OF CAREER AND TECHNICAL EDUCATION**

**Guidelines for the Technical Institute  
STRATEGIC PLAN  
INSTRUCTIONAL EQUIPMENT UPDATE PLAN FORM**

Name of TI: \_\_\_\_\_

Contact Name: \_\_\_\_\_

Contact Phone Number: \_\_\_\_\_

Contact E-Mail: \_\_\_\_\_

**Instructional Equipment Update Plan**

The TI strategic plan must address the repair, replacement and addition of instructional equipment. Action plans must include formal strategies and accountability plans for ensuring that all students are using equipment that is meeting industry expectations.

**Guidelines for Writing the Instructional Equipment Plan.** Include the completion of each item listed below, supported with documentation/evidence that each item was fully investigated in preparing the instructional equipment plan. Each item is followed by suggested documentation or evidence that should be included with the application.

**1. Instructional Equipment Updates**

Describe a plan for repairing, replacing and purchasing instructional equipment. The plan should ensure that students have access to functioning and relevant industry recognized equipment. The plan should describe how adequate funds are made available for purchasing and replacing equipment, tools, materials and supplies in accordance with the institution's planning objectives and acceptable business and industry practices to ensure safe, quality and effective TI programs. Describe how the equipment, tools, materials and supplies meet the competency based instructional needs of the curriculum (e.g., hand tools, computers, computer software, audiovisual equipment, reference materials and consumable materials). Describe how the quality and quantity of training stations are appropriate for the number of students being served. Describe the instructional equipment inventory management plan for maintaining equipment and replacing or disposing of obsolete equipment in place. Describe how the TI acquires equipment, materials and supplies within a reasonable period of time to provide safe and quality education

**Evidence includes:**

- a. List of goals for equipment maintenance and update.
- b. List of objectives for equipment maintenance and update.
- c. List of activities and resources required to achieve each goal.
- d. Timeline for each goal.

**Procedural Guidelines for the Technical Institute  
Instructional Equipment Plan**

**1.1 Plan Goals:** - identify the goals for maintaining the instructional equipment needed to operate the Technical Institute.

<p><b>1.2 Targeted Objectives</b> <i>Identify the specific objectives to be achieved in the plan for continuous plan to repair, replace and add instructional equipment needed to operate the Technical Institute:</i></p>	<p><b>1.3 Activities</b> <i>Include specific activities used for achievement of the goals and targeted objectives to be achieved in the plan to repair, replace and add instructional equipment needed to operate the Technical Institute:</i></p>	<p><b>1.3 Resource</b> <i>Include specific resources used for achievement of the goals and targeted objectives to be achieved in the plan to repair, replace and add instructional equipment needed to operate the Technical Institute:</i></p>	<p><b>1.4 Timeline</b> <i>Include specific dates for the achievement of targeted objectives:</i></p>

**THE PENNSYLVANIA DEPARTMENT OF EDUCATION  
BUREAU OF CAREER AND TECHNICAL EDUCATION**

**Guidelines for the Technical Institute  
LOCAL ADVISORY COMMITTEE FORM**

Name of TI: \_\_\_\_\_

Contact Name: \_\_\_\_\_

Contact Phone Number: \_\_\_\_\_

Contact E-Mail: \_\_\_\_\_

**Local Advisory Committee**

Each TI board operating a TI shall appoint an advisory committee. The Local Advisory Committee (LAC) has the function of advising the administration of the TI concerning the needs of the TI and the needs of business and industry as they relate to strategic planning, educational planning and recruitment of personnel need for a particular program, laboratory, occupation, equipment, curriculum, labor management coordination, business and industrial requirements or selection of personnel. Membership on the committee consists of business and industry representatives, public sector employers, agriculture, labor organizations, community organizations, postsecondary education institutions, administrators of the participating school districts and the general public. The members are appointed by the TI Board. The LAC meets at least once each year and gives advice to the TI Board and the administration concerning the program of the TI, including its general philosophy, academic and other standards, strategic plans, course offerings, support services, safety requirements and the skill needs of employers.

**Guidelines for Submitting Evidence of Local Advisory Committee Involvement** includes the completion of each item listed below, supported with documentation/evidence that each item was fully investigated in forming and operating a LAC. Each item is followed by suggested documentation or evidence that should be included with the application.

**1. Local Advisory Committee**

- a. Membership meets the regulatory requirements.

**Evidence includes:**

- a. List of committee members.
- b. Projected schedule of meetings.
- c. Projected agenda and minute format for LAC meetings.

**2. LAC Meetings**

- a. Provide documentation that meetings of the LAC will provide advice to the TI Board and the administration concerning TI programs including its general philosophy, program standards, course offerings, support services, safety requirements and the skill needs of employers.

**Evidence includes:**

- a. Projected LAC meeting agendas.
- b. Projected LAC meeting minute format.

<p><b>Guidelines for the Technical Institute Local Advisory Committee Functions</b></p>
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*Summarize the meeting minutes with respect to each area identified below:*

<p><b>3.1</b> Mission, Philosophy, Program Goals of the TI.</p>	
<p><b>3.2</b> Offerings in curriculum, course content, student competencies and safety procedures are current.</p>	
<p><b>3.3</b> Development of the TI admissions criteria and student recruitment.</p>	
<p><b>3.4</b> Identifying facility and equipment needs and providing supplies needed to operate TI program offerings.</p>	
<p><b>3.5</b> Discussion with administration regarding the local workforce investment board involvement with the LAC, specifically to determine regional high priority occupations and new programs that meet the local labor market demand.</p>	
<p><b>3.6</b> Examining employer requirements, anticipated employer needs and job availability.</p>	

**THE PENNSYLVANIA DEPARTMENT OF EDUCATION  
BUREAU OF CAREER AND TECHNICAL EDUCATION**

**Guidelines for the Technical Institute  
NONDISCRIMINATORY WRITTEN ADMISSION POLICIES FORM**

Name of TI: \_\_\_\_\_  
Contact Name: \_\_\_\_\_  
Contact Phone Number: \_\_\_\_\_  
Contact E-Mail: \_\_\_\_\_

Each TI board will develop an admissions policy that is nondiscriminatory and which ensures students are admitted based on ability to benefit from the programs. When the number of students applying for admissions exceeds the available number of openings, the policy must include a nondiscriminatory selection procedure. The admissions policy must be publicized.

TI publications, including guidance, course selection and TI marketing materials, must exemplify freedom from occupational stereotypes and, to the extent possible, the philosophy of equal access.

**Guidelines for Submitting Evidence of Nondiscriminatory Admission Policies.** Include the completion of each item listed below, supported with documentation/evidence that each item was fully investigated in preparing the admissions policy. Each item is followed by suggested documentation or evidence that should be included with the application.

**1. TI Admissions**

- a. The TI admissions handbook, course announcements, materials, brochures and similar materials convey the philosophy of equal access to students considering enrollment in a TI approved program.

**Evidence includes:**

- a. Copy of student handbook.
- b. Copy of admissions policy.
- c. Copy of marketing materials.
- d. Copy of course selection materials.

**THE PENNSYLVANIA DEPARTMENT OF EDUCATION  
BUREAU OF CAREER AND TECHNICAL EDUCATION**

**Guidelines for the Technical Institute  
GUIDANCE COUNSELING, PLACEMENT, AND FINANCIAL AID  
INFORMATION FORM**

Name of TI: \_\_\_\_\_

Contact Name: \_\_\_\_\_

Contact Phone Number: \_\_\_\_\_

Contact E-Mail: \_\_\_\_\_

**Guidance Counseling, Placement and Financial Aid Information** (22 Pa. Code § 339.57 (5))

The purpose of the career advisement services is to promote equal opportunity for the students enrolled in the TI programs. Services should be provided to students to assist them in selecting the most appropriate TI program, develop career plans, provide career and occupational opportunities upon graduation, maintain educational records, provide orientation programs for newly admitted students, placement services to students graduating and conduct follow up studies to determine the effectiveness of the TI program and services.

**Guidelines for Submitting Evidence of Career Counseling Services.** Include the completion of each item listed below, supported with documentation/evidence that each item was fully investigated in preparing a career advisement services plan. Each item is followed by suggested documentation or evidence that should be included with the application.

**1. Career Counseling Services**

- a. A Career Advisement Services plan exists and addresses provisions for student support offered to students enrolled in TIs.

**Evidence includes:**

- a. Copy of the Career Advisement Services Plan.
- b. Copy of financial aid information provided to students, parents and community.
- c. Well-defined course descriptions that reflect the overall objectives of the course and relationship of how the course content relates to occupational skills.
- d. Recruitment materials that offer a broad range of career opportunities.
- e. Materials evidence equal opportunities to participate in all activities regardless of race, color, national origin, age, gender or disability.
- f. Admissions policies and guidelines clearly stated and published.
- g. Materials exist that are made available to all students prior to enrollment and include such items as: prerequisites for enrollment, expectations for successful completion of a course, the type of report/feedback or grading system used, individual help/coaching available during the course, ethical responsibilities of the student, the type of certificate(s) students may earn, and articulation opportunities to postsecondary institutions

- h. Where applicable, projected enrollment and class sizes are in compliance with state standards.
- i. The institution informs students of the cost of the program and of any required equipment and supplies.
- j. Financial aid information, which is available to each individual.
- k. Institutional materials informing students of those receiving postsecondary institutions that are PDE Prior Learning Assessment (PLA) Institutions and participate in PLA.

<b>Procedural Guidelines for the Technical Institute Career Advisement Services</b>
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<b><i>Item 1 : Provisions</i></b>	
<b><i>Item 2: Financial Aid</i></b>	
<b><i>Item 3: Student Placement</i></b>	
<b><i>Item 4: Articulation and Career Pathway Opportunities</i></b>	