Developed by the Bureau of Vocational Education and the Kentucky Research Coordinating Unit, this handbook presents a suggested outline for the preparation of a state plan for vocational education which can be applied in any state, regardless of size. Intended for boards of education, advisory councils, school administrators, vocational educators, and others, the emphasis is on a systematic approach to state plan development at the state, regional, and local levels. The guide is divided into five chapters which are: (1) Orientation, (2) Organization for State Plan Development, (3) Administrative Provisions, (4) A Systems Approach to Program Planning, and (5) Long-Range and Annual Planning. Also included are appendixes providing information on (1) the planning unit, (2) cooperative agreements with Public Employment Service, State Department of Corrections, State Department of Child Welfare, and the State Department of Mental Health, (3) the allocation of funds, (4) local program application, (5) sources of planning information, and (6) a checklist for program planning. (Author/JS)
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vocational education handbook for
state plan development and preparation
A Systems Approach — 1970

Vocational Education Handbook for
State Plan Development and Preparation

Prepared by
E. P. Hilton and Steven J. Gyuro

Bureau of Vocational Education
State Department of Education
Frankfort, Kentucky

in cooperation with

Kentucky Research Coordinating Unit
for Vocational Education
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FOREWORD

This handbook, "State Plan Development and Preparation," has been prepared to help those persons in each State who have been assigned the responsibility for preparing the State Plan for Vocational Education. It outlines a suggested procedure to follow in the development of a State plan. The emphasis is on a systematic approach to State plan development at the State, regional, and local levels. This handbook should be helpful to boards of education, advisory councils, school administrators, vocational educators, program planning specialists, and others who are concerned with the development of State plans and with program planning in vocational education. The involvement of and cooperation with the State Advisory Council, State Employment Service, and other agencies and organizations is stressed.

The principles and procedures suggested in this handbook can be applied in any State regardless of size. Those responsible for State plan preparation must of necessity make the adjustments required to fit the procedures to the particular situation in their State.

Carl F. Lamar
Assistant Superintendent
for Vocational Education
Acknowledgments are given to the vocational education staff in the U. S. Office of Education for their guidance and assistance in preparing this handbook. Without their help it would have been most difficult to have compiled and arranged the information in a usable form.

The papers presented by the consultants at the National Vocational Education Conference on State Plan Development held in Covington, Kentucky, on March 25, 26, and 27, 1969, were used extensively as references. Appreciation is expressed to Dr. Walter M. Arnold, Dr. Cleveland L. Dennard, Dr. Harold Starr, Dr. William G. Loomis, and Dr. Rupert Evans for these papers and their contributions to the Conference.

Grateful acknowledgment is given to the staff of the Research Coordinating Unit in Vocational Education, University of Kentucky, for their contribution in the preparation of this document.

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E. P. Hilton
Steven J. Gyuro
## Contents

<table>
<thead>
<tr>
<th>Chapter</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Orientation</strong></td>
<td>7</td>
</tr>
<tr>
<td>Governmental Involvement</td>
<td>8</td>
</tr>
<tr>
<td>State Plan for Vocational Education</td>
<td>9</td>
</tr>
<tr>
<td>Rules and Regulations</td>
<td>10</td>
</tr>
<tr>
<td>State Plan Guide</td>
<td>10</td>
</tr>
<tr>
<td>Administrative Provisions</td>
<td>10</td>
</tr>
<tr>
<td>Program Planning</td>
<td>10</td>
</tr>
<tr>
<td><strong>Organization for State Plan Development</strong></td>
<td>13</td>
</tr>
<tr>
<td>Staff Organization</td>
<td>14</td>
</tr>
<tr>
<td>Identification of Tasks</td>
<td>15</td>
</tr>
<tr>
<td>Time Schedule for State Plan Development</td>
<td>16</td>
</tr>
<tr>
<td><strong>Administrative Provisions</strong></td>
<td>19</td>
</tr>
<tr>
<td>State Board</td>
<td>19</td>
</tr>
<tr>
<td>Public Hearing and Public Information</td>
<td>20</td>
</tr>
<tr>
<td>Personnel Qualifications and Improvement</td>
<td>20</td>
</tr>
<tr>
<td>Program Evaluation</td>
<td>21</td>
</tr>
<tr>
<td>Records and Reports</td>
<td>22</td>
</tr>
<tr>
<td>Cooperative Agreements</td>
<td>23</td>
</tr>
<tr>
<td>Vocational Education under Contract</td>
<td>24</td>
</tr>
<tr>
<td>Construction</td>
<td>24</td>
</tr>
<tr>
<td>Fiscal Control and Accounting</td>
<td>25</td>
</tr>
<tr>
<td>Allocation of Resources</td>
<td>25</td>
</tr>
<tr>
<td>Hearing on Local Applications</td>
<td>28</td>
</tr>
<tr>
<td>Effective Use of Results</td>
<td>27</td>
</tr>
<tr>
<td>Special Programs and Activities</td>
<td>27</td>
</tr>
<tr>
<td><strong>A Systems Approach to Program Planning</strong></td>
<td>29</td>
</tr>
<tr>
<td>Need</td>
<td>29</td>
</tr>
<tr>
<td>Systems Approach</td>
<td>31</td>
</tr>
<tr>
<td>Planning Process</td>
<td>32</td>
</tr>
<tr>
<td>Program Planning Model</td>
<td>34</td>
</tr>
</tbody>
</table>
# Chapter V  Long-Range and Annual Planning

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Long-range Plan</td>
<td>37</td>
</tr>
<tr>
<td>Steps in Program Planning</td>
<td>38</td>
</tr>
<tr>
<td>Commitment</td>
<td>38</td>
</tr>
<tr>
<td>Assessment</td>
<td>38</td>
</tr>
<tr>
<td>Manpower</td>
<td>39</td>
</tr>
<tr>
<td>Educational Programs</td>
<td>40</td>
</tr>
<tr>
<td>Population</td>
<td>41</td>
</tr>
<tr>
<td>Vocational Education Program Needs</td>
<td>43</td>
</tr>
<tr>
<td>Vocational Education Objectives</td>
<td>44</td>
</tr>
<tr>
<td>Ultimate Objectives</td>
<td>44</td>
</tr>
<tr>
<td>Long-range Objectives</td>
<td>45</td>
</tr>
<tr>
<td>Annual Objectives</td>
<td>45</td>
</tr>
<tr>
<td>Alternative Programs, Services, and Activities</td>
<td>46</td>
</tr>
<tr>
<td>Implementation Plan</td>
<td>47</td>
</tr>
<tr>
<td>Budget Preparation</td>
<td>49</td>
</tr>
<tr>
<td>Evaluation</td>
<td>50</td>
</tr>
<tr>
<td>Annual Plan</td>
<td>50</td>
</tr>
<tr>
<td>Analysis of Objectives</td>
<td>50</td>
</tr>
<tr>
<td>Development of Programs, Services, and Activities</td>
<td>51</td>
</tr>
<tr>
<td>Allocation of Available Funds</td>
<td>51</td>
</tr>
<tr>
<td>Local Agency Applications</td>
<td>52</td>
</tr>
</tbody>
</table>

## Appendices

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>A Planning Unit</td>
<td>55</td>
</tr>
<tr>
<td>B Organizing of State Staff</td>
<td>57</td>
</tr>
<tr>
<td>C Advisory Council</td>
<td>58</td>
</tr>
<tr>
<td>D Cooperative Agreements with Public Employment Service</td>
<td>62</td>
</tr>
<tr>
<td>E Memorandum of Understanding</td>
<td>63</td>
</tr>
<tr>
<td>F Cooperative Agreement with State Department of Corrections</td>
<td>64</td>
</tr>
<tr>
<td>G Cooperative Agreement with State Department of Child Welfare</td>
<td>65</td>
</tr>
<tr>
<td>H Cooperative Agreement with State Department of Mental Health</td>
<td>66</td>
</tr>
<tr>
<td>I Allocations of Funds to Programs, Services, and Activities</td>
<td>67</td>
</tr>
<tr>
<td>J Allocations of Funds to Educational Agencies</td>
<td>68</td>
</tr>
<tr>
<td>K Local Program Application</td>
<td>71</td>
</tr>
<tr>
<td>L Check List for Program Planning</td>
<td>91</td>
</tr>
<tr>
<td>M Sources of Planning Information</td>
<td>91</td>
</tr>
</tbody>
</table>

## References

93
Vocational education is that part of the total program of education which deals with preparation, including vocational guidance and counseling, exploration and training, for careers in the world of work below the professional level. Vocational education helps to give definite purpose and meaning to education by relating training to specific occupational goals. It is more inclusive than training for job skills; it also develops abilities, understandings, attitudes, work habits, and appreciations which contribute to a satisfying and productive life. The vocational education program does not take the place of general academic education; it supplements and enhances it for students who want training for a chosen occupation. Programs in both vocational and academic education are administered by legally constituted State and local school authorities who recognize their responsibility to provide opportunities for both forms of education. Vocational education is an important part of a well-balanced school program, not a single subject. It is part of a well-rounded program of studies which provides for developing competent workers and recognizes that the American worker should also be competent economically, socially, emotionally, physically, intellectually, and in a civic sense. Vocational education for adults plays an essential role in maintaining America’s efficiency in production, distribution, and consumption; and, as a consequence, its high standard of living. Adult workers in any field, through training in skills and knowledge related to their occupation, can adapt themselves to technological advances and other developments in their occupation, become more productive, prepare themselves for advancement, and increase their earning capacity.
It cuts across all levels of education, extending from the elementary school through secondary, post-secondary, and adult and continuing education. The effectiveness of vocational education will depend upon a sound foundation in basic education at these different levels. Vocational education should be planned as an integral part of a comprehensive program at all levels of education.

The emphasis in vocational education is upon the occupational needs of people rather than upon occupations in need of people, although the need for reconciling the two must be clearly recognized.

The States must be effective in assessing the needs of the people for vocational education and the manpower requirements of the labor market. Programs, services, and activities in vocational education should be broad enough to meet the needs of people. Effective program planning must be objective. The evaluation of results of programs, services, and activities should be stated in terms of their objectives and used as the basis for continuing State program planning.

The public should have an opportunity to voice its opinion about vocational education and have the opportunity to be heard. Widespread involvement of the people is necessary in spelling out the things that need attention in providing vocational education programs, services, and activities. Those responsible for planning vocational education are expected to make this possible.

Governmental Involvement

Vocational education is the concern of government at all levels. The Federal Government has given encouragement and support to education since the early days of its history. Vocational education was one of the first areas to receive the direct benefits of Federal funds to stimulate its growth and development. The Smith-Hughes Act of 1917 is usually referred to as the beginning of the Federal-State relationship with regard to vocational education. Since 1917, a number of Federal laws have been enacted relating to vocational education. Each of them has added a new dimension to the program and as a whole they have given direction to the development of vocational programs in the States. They have influenced the scope and nature of vocational education programs, services, and activities in many important ways.

The Constitution of the United States provides for the general welfare of the people. It is out of this concern that the Federal Government becomes involved. The economic well-being of the Nation is a concern of all its citizens, and effective programs of vocational education contribute to the economic well-being. A competent and well-trained work force is essential to the national defense.
The Vocational Education Amendments of 1968 give support and direction to vocational education in the States so that persons of all ages in all communities of the States will have ready access to vocational training or retraining which is realistic in the light of actual or anticipated opportunities for gainful employment and which is suited to their needs, interest, and ability to benefit from the training.

The major responsibility for education rests with each individual State. Educational programs are operated within the State according to State laws and rules and regulations of the State agency responsible for education. The State makes a major financial contribution to the support of education within its boundaries and is responsible for policies and procedures for program operation.

Local educational agencies are responsible for planning and operating programs of vocational education to meet the needs of their people. Policies and procedures relating to State laws and State regulations are adopted for the operation of educational programs at the local level. Much of the financial support for education comes from local sources. The local educational agency is responsible for the kind of educational programs offered.

The role of government at all levels in the development of vocational education might be stated thusly, the Federal Government gives direction and financial support, each State assumes responsibility for formulating policies and objectives and establishing rules and regulations, and local educational agencies plan and operate the programs at the local level.

State Plan for Vocational Education

The Vocational Education Amendments of 1968 make it mandatory that any State expecting to receive Federal funds for the support of its vocational education program shall prepare and submit to the U. S. Commissioner of Education a State plan for approval:

Any State desiring to receive the amount for which it is eligible for any fiscal year pursuant to this title shall submit a State plan . . . Sec. 123(a), P.L. 90-576.

The Federal-State-local relationships will be spelled out in an agreement between the State and Federal Government which is indicated in a State plan. This plan, when submitted by the State and approved by the U. S. Commissioner of Education, is the basis upon which eligibility of the State for Federal funds is determined. It represents a commitment by the State as to how the program of vocational education in the State, will be carried out. This plan includes a general statement of the State program of vocational education and the policies, methods, and procedures to be followed by the State Board for Vocational Education in administering the program. It serves as a basis for administrative decisions.
This plan is based upon the Vocational Education Amendments of 1968, Rules and Regulations, the State Plan Guide prepared by the U. S. Office of Education, and State laws, rules, and regulations.

Rules and Regulations
The Federal Rules and Regulations are prepared by the U. S. Office of Educational to interpret the 1968 Vocational Education Amendments and the intent of Congress in passing this legislation which are revealed in the congressional hearings. These rules and regulations serve as a legal base for program development and, when published in the Federal Register, have the effect of law.

State Plan Guide
The State Plan Guide is developed by the U. S. Office of Education to provide a logical organizational pattern for writing the State Plan. This has been done to assure that the mandates of the Amendment and Rules and Regulations are included in each State plan and a sound basis is established for conducting vocational programs, services, and activities. The State Plan Guide is an outline which presents the required provisions in an acceptable format to be used as a pattern by the State staffs in preparing and presenting their State plan for approval. It provides an indexing system which enables the U. S. Office of Education to compare State plans from the different States and provides a system of references for the States. Each State must develop its State plan with respect to its own vocational education needs and in accordance with its own laws and rules and regulations. The State Plan Guide should be used so that all relevant subjects and materials will be appropriately covered in the agreement in an orderly manner, and the arrangement will be consistent from State to State.

Administrative Provisions
Part I of the State plan includes the administrative provisions. They constitute the basis upon which the State establishes eligibility for Federal funds. When the provisions are approved by the Commissioner of Education, it becomes a contract between the State and the Federal Government. These administrative provisions, as agreed upon, are binding upon the State Board in the administration of vocational education programs, services, and activities.

Program Planning
Parts II and III of the State plan, the long-range and annual plans, are for the most part estimates and projections which are not intended to be legally binding upon the State. They should be designed to inform the Commissioner of Education of the State Board's plans and intentions in carrying out vocational education programs, services, and activities on a long-range basis and for the year ahead.
The program planning reflected in Parts II and III represent important aspects of the State plan. It is in these parts that decisions are described and procedures are outlined which when carried out will determine the effectiveness of the vocational education programs, services, and activities in meeting the vocational educational needs of the people.
Chapter 2

ORGANIZATION FOR STATE PLAN DEVELOPMENT

The Vocational Education Amendments of 1968 and the Rules and Regulations are rather specific in stating what shall be included in a State plan. Emphasis is placed on new approaches, diversity, and flexibility so that the vocational education programs in the State are responsive to the occupational education needs of individuals and employment opportunities for youth and adults. Priority attention is given to programs, services, and activities for disadvantaged persons; the physically or mentally handicapped; those preparing for occupations requiring post-secondary education; and those students enrolled in non-public schools. The Vocational Education Amendments of 1968 require that special consideration be given to economically depressed areas, areas of high rates of unemployment, areas with high rates of youth unemployment, and areas of high rates of school dropouts.

Planning at all levels is required. Program planning is a continuous process, and functional State plans are an outgrowth of this process. State plan preparation is no easy task. It involves a logical arrangement of materials, content, and the effective organization of the vocational education staff working with other agencies, organizations, and individuals to develop a workable plan.

The purpose of this chapter is to help the States in organizing the resources available to develop a State plan for vocational education. Organization of the State vocational education staff, identification of tasks to be performed, and adoption of a time schedule are the initial steps in State plan development.
Staff Organization

The State director of vocational education is responsible for organizing the staff to prepare the State plan. One person should be responsible for coordinating the development of the document. This may be the State director of vocational education or someone designated by him. This person will be responsible for assigning the tasks to be performed and directing the work of the staff which is involved in preparing the State plan.

The effectiveness of the organizational structure in developing and writing the State plan will depend upon the number and competence of the State director's staff. All staff members should be involved in some way. Usually this task is assigned to the planning section (see Appendix A), and all other sections or persons on the staff act as consultants or assistants relative to the part of the plan that involves their area of responsibility or concern. In the absence of a planning section or a person charged with the responsibility for planning, this responsibility may be assigned to committees of staff members who shall be charged with developing certain sections of the State plan. A steering committee, made up of representatives from each working committee, should pull together the work of all committees into a cohesive document.

In assigning staff duties and responsibilities for preparing the State plan, it may become evident that the present staff is inadequate in number or in background and training in certain areas of responsibility to carry out the administrative and supervisory functions needed. This may result in a reorganization of the present staff, reassignment of responsibilities, or the recommendation for additional personnel. These suggested changes should be reflected in the staff positions and staff organization shown in the State plan. Appendix B is an example of one State's staff organization and illustrates how this State is attempting to organize its staff to carry out the administrative and supervisory functions of vocational education in the State.

Representatives from Federal and State agencies, advisory councils, boards of education, State Department of Education, institutions of higher education, welfare organizations, employment service, private training institutions, business and industry, labor groups, chambers of commerce, trade associations, and other such organizations who have an interest in and concern for vocational education should be involved, either as consultants or as members of the committees. The person in charge of State plan development needs to solicit the services of a person or persons who have expertise in writing and in vocational education to help pull together the findings of all groups into the final document. Before adoption of the State plan, copies of the tentative document should be presented to all of those who have had a part in its development for their criticism and suggestions.
Identification of Tasks

The proposed plan should be broken down into its major parts and assigned to the committees or persons responsible for preparation of the State plan.

The tasks in State plan development directly relate to:

a. Identifying the information needed
b. Determining the sources of needed information
c. Developing instruments to collect the information
d. Collecting the necessary information
e. Analyzing the information
f. Synthesizing and reporting
g. Using information for developing criteria, policies, and procedures for the following:

1. An analysis of State and Federal laws, rules, and regulations governing vocational education (legal requirements and restrictions)
2. An organization of State Board and State Board staff
3. Determining the qualification and procedure for professional improvement of personnel
4. Planning for the development of cooperative arrangements with other States, other agencies, organizations, and institutions
5. Providing for vocational education under contract
6. Developing construction requirements
7. Planning for effective use of results of programs and experiences
8. Identifying economically depressed, high unemployment, and school dropout areas, as well as other target areas of special attention
9. Developing procedure for fiscal control and financial accounting
10. Developing procedure for allocation of funds to vocational education purposes and to local educational agencies
11. Developing procedure for initiating and conducting vocational programs for the disadvantaged and handicapped
12. Developing procedure for initiating and conducting exemplary programs and projects
13. Developing procedure for establishing and operating exemplary programs and projects
14. Developing procedure for establishing and operating residential vocational schools
15. Developing procedure for establishing and operating consumer and homemaking education programs
16. Developing procedure for initiating and conducting cooperative vocational education programs
17. Developing procedure for operating work-study programs
18. Developing a long-range plan (five years) by:
   (a) Analysis of manpower needs and job opportunities in the State
   (b) Analysis of availability of vocational education
   (c) Analysis of the State's population relating to vocational education needs
   (d) Determining vocational education program needs
   (e) Determining vocational education objectives for all programs, services, and activities
   (f) Projecting the State programs, services, and activities
19. Developing an annual plan by:
   (a) Allocation of resources
   (b) Developing programs, services, and activities under Part B of the Amendment
   (c) Developing programs for the disadvantaged
   (d) Providing for research and training
   (e) Developing exemplary programs and projects
   (f) Establishing and operating residential schools
   (g) Conducting consumer and homemaking programs
   (h) Providing cooperative vocational education programs
   (i) Providing for work-study programs

Each of these tasks may be grouped or broken down still further and assigned to a committee or a person for completion.

Time Schedule for Plan Development
To facilitate the work on the State plan, a time schedule should be developed. This time schedule will apply, both to the development of the original plan, and to the review and revisions of existing plans. Each person or group of persons working on the State plan needs to be notified of the date his work is to be completed. This date should conform to the overall time schedule for the State plan development. The following chart represents a suggested time schedule that might be used by a State in the preparation and revision of its State plan.
Figure

Time Line for State Plan Development

A Jul Final Approval of Local Applicants—Due to Local Agencies
B Oct 1 State Descriptive, Financial & Statistical Report (previous Year)—Due to U. S. Office of Education
C Oct Local Enrollment Report—Due to State Department
D Nov Follow-up Report—Due to OE
E Jan State Plan Development—Initiate
F Feb Tentative Local Applications & Recommendations for Programs, Services, and Activities for Next Year (Due to State Dept.)
G Apr State Advisory Council, Consultation and Formal Review of State Plan—Due to State Department
H Apr State Board of Education Public Hearing of State Plan
I Apr State Plan Completed
J May State Board of Education Approval of State Plan
K May Tentative Approval of Local Applications—Due to Local Agencies
L May State Plan—Due to OE
M Jun Local Descriptive, Financial & Statistical Report (Previous Year)—Due to State Department
N Jun 30 End of Fiscal Year
Chapter 3

ADMINISTRATIVE PROVISIONS

Administrative provisions are presented in Part I of the State plan. They provide the legal framework for the operation of the State programs of vocational education. The Federal State Plan Guide is to be followed closely in developing the administrative provisions of the State plan. The administrative provisions provide procedures for recognizing the need for management information concerning social and economic conditions, mobility of the people, and occupational career development. Instructional standards should be realistic in terms of the vocational objectives of the students. Instructional time should be only that which is necessary for the students to acquire the attitudes, knowledge, and basic skills required for entering or advancing in the labor market.

Each State plan should make provisions for the kinds of programs, services, and activities that will meet the needs of its people. The plan will differ from State to State, depending on State laws and the economic and social situation in the respective States.

State Board

The first major section dealing with the State Board for Vocational Education is of a general nature. The Amendment requires that the State plan:

designates the State Board as the sole agency for administration of the State plan, or for supervision of the administration thereof by local educational agencies

. . . Sec. 123 (a) (2), P.L. 90-576.
The procedure for developing the State Board section can be assigned to someone who is familiar with the State statutes and has the ability to assemble the information regarding the legal basis for the State to receive Federal funds, the State Board’s organization and its authority, and the person designated as executive officer.

**Public Hearing and Public Information**

The State Board for Vocational Education has the responsibility to inform the public and arrange for and conduct a public hearing on the State plan before it is finally approved by the State Board.

Assurance will be given in the State plan that the public:

- has been given reasonable notice, and afforded a reasonable opportunity for a public hearing . . . Sec. 123 (a) (3) (A), P.L. 90-576.

The procedure for informing the public about a public hearing on the State plan for vocational education will vary from State to State depending on what is now being done in the State. Public announcements in the newspaper, television, and radio, or by letters to interested persons, organizations, or agencies are the most common ways of informing people.

The State Board should establish a definite procedure for disseminating information to the general public. A mailing list is one of the best ways of informing the public about vocational education.

Among the agencies, organizations, and groups suggested to be on the mailing list are:

- Radio and television stations
- Newspapers
- Local educational agencies
- Local school administrators
- Local boards of education
- School libraries
- Public libraries
- College and university libraries
- Chambers of commerce
- State agencies concerned with manpower development and training
- Civic groups
- Other groups interested in vocational education

Provision must be made at the hearing for recording the suggestions and criticisms which are to be considered by the State Board before final adoption of the State plan.

**Personnel Qualifications and Improvement**

The State Board for Vocational Education has the responsibility for
deciding on the kind and number of personnel needed to administer, supervise, and conduct programs of vocational education under the Amendment and for improvement of the competencies of personnel.

The Amendment requires that the State plan:

- provides minimum qualifications for teachers, teacher-trainees, supervisors, directors, and other personnel having responsibilities for vocational education in the State and the policies and procedures developed to improve the qualifications of such personnel and to insure that such qualifications continue to reflect a direct relationship with the need for personnel in vocational education programs carried out under the State Plan... Sec. 123 (a) (7), P.L. 90-576.

The State program of vocational education must be carefully analyzed to determine the kind, number, and qualifications of persons needed to operate it. Consideration is to be given to their training and experience in light of the jobs to be done and qualifications written in the State plan for persons to fill each of these positions. In determining the qualifications of vocational education personnel consideration should be given to:

a. General education required
b. Technical knowledge and training
c. Professional education preparation
d. Work experience
e. Professional experience, where applicable

The qualifications of personnel listed in the State plan should be such that will give reasonable assurance that needed personnel can be found and that they will be able to provide a quality program of vocational education. The difficulty of securing qualified personnel may make it necessary sometimes to employ persons who have less than the full qualifications. Provision should be made in the State plan for assuring that these people will be brought up to full qualifications as rapidly as possible.

Under Title II of the Vocational Education Act and Part C, D, and F of the Professional Development Act of the Higher Education Act of 1965 (PDEPA), provisions are made to provide for the training and upgrading of the professional personnel in vocational education. It is recommended that consideration be given to this phase of the Amendment in developing the State plan.

Program Evaluation

the State board shall be responsible for assuring that State and local programs, services, and activities carried out under the State plan will be periodically evaluated
with sufficient extensiveness and frequency to enable the
State Board to effectively carry out its functions under the
State plan and fulfill the purposes of the Act... Rules
and Regulation Sec. 102, 36 (4), Federal Register.

Persons responsible for program development and supervision are also
concerned with evaluation and need to be involved in setting up the criteria
and procedures to be used in the evaluation of vocational programs, services,
and activities in terms of their objectives. The person or persons assigned
the responsibility for developing this section of the State plan should use
the knowledge and expertise of all persons concerned with program develop-
ment in formulating the evaluation procedures.

It is advisable that provision be made to use the evaluations conducted
by the State Advisory Council (see Appendix C), studies by the Research
Coordinating Unit, and evaluations of vocational programs made by other
State agencies and organizations. The method and procedure for evaluation
are to be set forth in the State plan.

In providing for the evaluation of vocational education, attention must
be given to the areas of vocational education to be evaluated and to the
frequency of such evaluation. Criteria relating to objectives are to be de-
developed for evaluating programs, services, and activities. Some States and
educational research centers have developed or are developing such criteria
to assist in evaluating vocational programs. The Center for Vocational and
Technical Education, Ohio State University and the Center for Occupational
Education, North Carolina State University, among others, are in the process
of developing a systems approach that may be of assistance in evaluating
programs of vocational education.

Records and Reports
A procedure for maintaining accurate records that give a picture of
what is being done and making necessary reports, must be a part of the State
plan which:

provides for making such reports in such form and contain-
ing such information as the Commissioner may rea-
sonably require to carry out his functions under this title,
and for keeping such records and for affording such ac-
cess thereto as the Commissioner may find necessary to
assure the correctness and verification of such reports;
and... Sec. 123(a) (17), P.L. 90-576.

Statistical and financial information which is reliable and gives the
picture of the programs of vocational education in the State are necessary
for program planning and reporting. The procedure for securing this informa-
tion will vary from State to State, depending upon the system used in the
State for securing, recording, and disseminating such information. The State
plan should spell out the kind of information needed, how it is to be collected, and who is responsible for collecting and recording it. The plan for securing and recording this information may be reflected in the staff organization chart for vocational education.

**Cooperative Agreements**

Many agencies and organizations, both public and private, have responsibilities related to occupational education. In order to coordinate the efforts of all agencies and organizations concerned with occupational education, the State agency for vocational education is authorized to develop cooperative agreements with them. It is mandatory that the State plan:

- provides for entering into cooperative arrangement with the system of public employment office in the State...
- Sec. 123 (a) (7) and Cooperative arrangements with other agencies, organizations, and institutions concerned with manpower needs and job opportunities...
- Sec. 123(a) (9), P.L. 90-576.

The kind of cooperative agreements needed and the procedure for developing them are to be included in the State plan. The agreements in a given State will depend upon the agencies and organizations in the State involved in occupational education. The Rules and Regulations require copies of cooperative agreements to be included as a part of the State plan.

In developing cooperative agreements, State staffs in vocational education need to meet with the staffs of agencies or organizations concerned so as to develop essential understandings and make clear the responsibilities of each agency. These staffs will develop the agreement for approval by their respective agency. It is necessary that meetings between the staffs of the agencies involved be held from time to time to review the agreement and working relations and to keep them up to date.

Illustrations of suggested cooperative agreements are listed in the Appendix. These examples are not intended to be models for States to use. They need to be revised to satisfy particular situations.

**Appendix D.** Cooperative agreement between Public Employment Office and State Board for Vocational Education

**Appendix E.** Memorandum of Understanding Among Bureau of Vocational Education, Bureau of Vocational Rehabilitation Services and Bureau of Instruction, Division of Special Education

**Appendix F.** Cooperative agreement between State Department of Corrections and Bureau of Vocational Education.

**Appendix G.** Cooperative agreement between the State Department of Child Welfare and Bureau of Vocational Education

**Appendix H.** Cooperative agreement between the State Department of Mental Health and the Bureau of Vocational Education.
Vocational Education under Contract

Sometimes it is economical and feasible for the State agency to contract for vocational instruction with private institutions. This may be for the total instruction toward an occupational objective, or for only one part or phase of the instruction leading toward the objective. The State plan shall make:

- provision of vocational training through arrangements with private vocational training institutions where such private institutions can make a significant contribution to attaining the objectives of the State plan, and can provide substantially equivalent training at a lesser cost, or can provide equipment or services not available in public institutions; ... Sec. 122 (a) (7), P.L. 90-576.

Any contractual agreements for the use of vocational funds with a private institution for vocational instruction will be in accordance with the State laws governing the use of public vocational funds. The State plan should cite the legal basis for making such contracts. The procedures and criteria for contracting with private agencies or institutions are to be specific and give duties and responsibilities of each of the contracting parties. The contract shall incorporate standards and requirements of instruction set forth in the Rules and Regulations and the State plan. Such contracts shall be reviewed at least annually. Provision should also be made for the procedures to be used by the State staff in the follow-up of the instruction to see that the agreement is being carried out and that the instruction under contract is being conducted as a part of the vocational education program of the State and contributes a reasonable and prudent use of available funds.

Construction

The procedure for planning the construction of area vocational school facilities is to be carefully outlined in the State plan which:

- provides assurance that the requirements ... will be complied with on all construction projects in the State ... Sec. 123(a) (14), P.L. 90-576.

Federal and State laws and regulations governing construction of facilities are to be followed and cited in the State plan.

A procedure for awarding construction contracts, acquiring land and buildings, purchasing initial equipment, and contracting for architectural services is to be included. The method and procedure for checking compliance with contracts, State and Federal laws and rules and regulations are also to be included. The person who has the responsibility for planning and supervising construction will be designated in the State plan. This responsibility may be assigned to the staff of the State agency for vocational education, or it may be done through a cooperative arrangement with other State agency personnel.
Fiscal Control and Fund Accounting

The Amendment requires that the State plan:

sets forth such fiscal control and fund accounting procedures as may be necessary to assure proper disbursement of, and accounting for, Federal funds paid to the State (including such funds paid by the State to local educational agencies) under this title... Sec. 123(a) (12), P.L. 90-576.

The fiscal control and fund accounting procedure for Federal vocational education funds must conform to Federal and State laws and procedures for fiscal accounting. The plan will include procedures for giving assurance that the funds will be expended for the purpose for which they were appropriated and a procedure developed for the non-commingling of funds where required.

The person or persons responsible for the development of the fiscal accounting procedures for the use of Federal funds for vocational education will relate to other State personnel or agencies who have responsibility in this area. The relationship to those responsible for the fiscal accounting and use of educational funds and the relationship to the State's general financial and accounting personnel will be shown. All persons responsible for fiscal accounting in the State should be involved either in the act of writing of the policies and procedures for fund accounting or in a consultative capacity.

Allocation of Resources

The Amendment states that:

from the sums made available for grants under this part pursuant to sections 107 and 103, the Commissioner is authorized to make grants to States to assist them in conducting vocational education programs for persons of all ages in all communities of the States, which are designed to insure that education and training programs for career vocations are available to all individuals who desire and need such education and training... Sec. 121, P.L. 90-576.

The policies and procedures developed in the State plan for the allocation of funds for programs, services, and activities must take into consideration the eight purposes listed in the Amendment for which funds can be used and the allocation of funds for these purposes. These include:

a. Programs of vocational education for high school students
b. Programs of vocational education for post-secondary students
c. Programs of vocational education for adults
d. Programs of vocational education for disadvantaged and handicapped
e. Construction of area vocational school facilities
f. Vocational guidance and counseling

g. Arrangements with private vocational training institutions

h. Ancillary services and activities, including teacher training and supervision, program evaluation, special demonstration and experimental programs, development of instructional materials, and improved State administration and leadership

The Amendment specifies that at least 15 percent of each State's allocation under Part B shall be used for post-secondary students, 15 percent for the disadvantaged, and 10 percent for the handicapped.

The Amendment, also, under Section 123 (a) (16), requires it mandatory that the State give attention to the allocation of funds to areas of high concentration of youth unemployment and school dropouts and make provisions for students enrolled in non-profit private schools, who have vocational education needs.

The State plan includes a rational basis for making allocations of such resources; first, to the eight purposes for which funds can be used, and, second, to agencies within the State for these purposes.

Appendix I is an example of how one State allocates funds to each of the purposes of the Amendment.

Appendix J is an example where a mathematical formula is used by one State for the allocation of funds to educational agencies.

Some of the purposes of the Amendment can best be achieved on a pooled area basis rather than by any single educational agency, and it may become necessary to combine resources of a number of agencies to perform the services necessary for a given area. Provisions should be made to permit the pooling of resources to provide for vocational education needs.

The allocation of funds to districts or agencies is made on the basis of an application which takes into consideration the allocation procedures under the law and policies of the State Board for Vocational Education. The application should show each program to be offered with its needs and objectives costed. Attention should be given, in making the application, to the total needs for programs, services, and activities to be operated by the agency with priorities given to each program. A program application used in one State is shown in Appendix K as an example.

Hearing on Local Applications

The Amendment makes it mandatory that the State plan:

provides that any local educational agency dissatisfied with the final action with respect to any application for funds under this title shall be given reasonable notice and opportunity for a hearing... Sec. 123 (a) (13), P.L. 90-576.
The procedure for requesting a hearing by the local educational agency is to be spelled out in the plan. Provision will also be made for holding this hearing and providing a written record thereof and of informing the local educational agencies in writing of the decisions and the reasons therefor. A procedure should also be provided for the local educational agency to appeal the decision to the United States Courts for review if they so desire.

Effective Use of Results of Programs and Experiences

The Amendment makes it necessary that the State plan:

- provides that effective use will be made of the results and experience of programs and projects assisted under other parts of this title . . . Sec. 123 (a) (10), P.L. 90-576.

The State plan will include procedures for making use of the results of programs and experiences under Parts C through I of the Amendment. The procedure for gathering and disseminating information on these programs should be described and the use to be made of this information explained in changing existing programs or developing new ones to meet the vocational education needs of people. It is important that this information be employed as the basis for bringing about needed changes in vocational education.

Special Programs and Activities

In order to assure that attention will be given to new approaches to vocational education and to be sure that vocational education is responsive to the employment and job opportunity needs of youth and adults, the Amendment requires that special attention be given to specific areas designated in the Amendment. The State plan must spell out the procedures to follow in carrying out:

- a. Vocational education programs for the disadvantaged
- b. Vocational education research and personnel training
- c. Exemplary programs and projects
- d. Establishment and construction of residential vocational education schools
- e. Consumer and homemaking education
- f. Cooperative vocational education programs
- g. Work study programs for vocational education students

Some of these areas may have separate funding. The State plan is to describe the financial support to be given to these programs. This support may be provided under Part B purposes and in the separate parts or in both.

The procedure to be used in funding must conform to the Amendment and to the Rules and Regulations which pertain to the part for which procedures are being developed.
The State plan should provide the procedures for:
   a. Submission, review, and action on applications
   b. Establishment and operation of programs
   c. Allocation of funds
   d. Noncommingling of funds where required
   e. Participation of students in nonprofit private schools, for the disadvantaged and handicapped, and in cooperative education programs
   f. Establishment and operation of a State Research Coordinating Unit
   g. Other activities not consistent with the programs, services, and activities under Part B of the Amendment
The purpose of this chapter is to provide the planning concepts and process guidelines necessary to carry out the planning functions at the State and local levels in the preparation of a State plan for vocational education with emphasis on long-range and annual planning.

Need

Planning has become an integral part of the executive branch of the Federal Government. On the morning of August 25, 1965, President Lyndon B. Johnson made the following statement:

I am asking each of them (Cabinet members and agency heads) to immediately begin to introduce a very new and a very revolutionary system of planning and programming and budgeting throughout the vast Federal Government, so that through the tools of modern management the full promise of a finer life can be brought to every American at the lowest possible cost. (Presidential quote from the Public Papers of the President of the United States, Lyndon B. Johnson, 1965. Book II)

This same requirement for systematic planning was recently stated at the Governor's Conference on State Planning:

Every Governor understands that we must develop more sophisticated ways of storing facts, of facing issues, of opening options, to make better decisions if we, as
States, are to continue as effective partners in our Federal system. We must have means to survey where we are, what the gaps in our efforts are, what our goals should be, what the alternative means and ways to these goals are, what the costs and benefits are, what the relative priority between various goals is. The list is well known, but for some reason, these questions have never excited the imagination. (U. S. Senate. Criteria for Evaluation in Planning State and Local Programs, A Study, Committee on Government Operations, Subcommittee on Inter-governmental Relations, 90th Congress, 1st Session, July 21, 1967.)

In addition to the recognition of planning and mandating the preparation of a State plan, the 1968 Amendments to the Vocational Education Act of 1963 specify the legal base which serves to outline the requisite elements in planning for vocational education.

The need for planning vocational education programs is evidenced by the:

a. Legal requirements and restrictions of the law — Federal, State, regional, and local
b. Scope and complexity of present vocational education programs and program needs
c. Demand for public justification of resource allocation to vocational education
d. Necessity for unified programs to solve problems facing vocational education
e. Realization of the active competition of vocational education with other sectors of the economy. (military, welfare, transportation, space program, etc.) as well as within the field of education (higher education, general education, basic adult, etc.) for limited resources
f. Urgency for public accountability (evaluation) of vocational education programs, services, and activities
g. Requirement for valid and timely information for decision-making by vocational educators at all levels of vocational education
h. Requirement for priorities among multiple objectives in vocational education

Systematic planning must become an integral part of all vocational education efforts, if it is to achieve the mandated mission of meeting the vocational needs of all the people. Planning is the development of a set of decisions which will be put into action in the future to achieve desired goals through optimal activities. Planning is a continuous, cyclical, and dynamic process; and as a process, planning requires:
a. Large amounts of information  
b. Time  
c. Resources  
d. Staff with specialized competencies  
e. Operational communications (horizontal and vertical)  
f. Functional relationships (internal and external)  
g. Systematic approach

Systems Approach

Complexity, scope, sophistication, diversity, and decentralization of vocational education programs, services, and activities make a systems approach to planning desirable. The problem of limited resources and expanding demands in light of social, economic, and political considerations necessitates a formalized systematic planning effort.

A systems approach to program planning is a rational and logical procedure which allows problem solving techniques to be applied to individual aspects of the total problem area. A system is a set of elements which are interrelated and interdependent and are goal-oriented within a specific context.

Systems approach to program planning in vocational education is directed toward the elements of vocational education, including programs, services, activities, budgets, facilities, and personnel, and their relationships with each other and the environment in which they operate, as they attempt to attain specified vocational objectives. The systems approach to planning as developed in this chapter focuses upon:

a. Establishment of desired objectives  
b. Formulation and development of efficient and effective alternative means of attaining desired objectives  
c. Allocation of resources to optimal means required to achieve the desired objectives

The purpose of a systems approach to program planning is to employ a methodology which systematically transforms relevant data in such a manner as to provide an improved information base upon which decisions can be made on how to allocate resources.

The systems approach to program planning is designed to:

a. Provide the decision-maker with more relevant and specific information  
b. Provide for developing a set of goals and objectives to meet the vocational needs of the people  
c. Assist in the design of possible alternative programs, services, and activities  
d. Analyze systematically and present for review, established priorities
e. Evaluate all inherent costs and degree of effectiveness of each alternative
f. Insure a time dimension to ascertain the full impact of expenditures and accomplishments in the form of multi-year program budget (output based)
g. Review goals, priorities, and alternatives and conduct a programmatic analysis (evaluation) on a continuing scheduled basis to provide essential feedback to the systems planning process

"A System Approach to Vocational Technical Education Planning at the Local Level" by Cleveland L. Dennard and "Vocational Education Program Planning at the State Level" by Walter M. Arnold provide additional systems strategies and tactics to be employed in the preparation of a State Plan for Vocational Education. Each of these papers provides specific planning tools and methods with helpful illustrations and examples of useful data collection and process techniques.

Planning Process

The systems approach to the planning process centers around the assembling and using of information. This process involves these major components — identification, collection, exchange, analysis, synthesis, decision-making, and dissemination of information. This planning process encompasses several principal participating sources of information. These sources of information and their relationships to each other are shown in Figure II.

The State Board for Vocational Education, in consultation with the State Advisory Council for Vocational Education, forms the legal basis for the preparation of the State plan. However, all of the elements identified in Figure II are involved in the planning process. The local agencies are the action agents. The local base where instructional programs, services, and activities were operated is the primary source of planning information. Valid and relevant information is the vehicle necessary for State plan preparation and decision-making at all levels.

The planning efforts at all levels focus upon the balance of three basic variables. The variables are time, cost, and level of performance. It is with the consideration of these variables, in terms of desired goals and possible programs, services, and activities, that the systems approach to planning can direct, unify, and coordinate the preparation of a State plan for vocational education.

NOTE: Nature of Information Flow

U.S. Office of Education

State Advisory Council

Regional Advisory Council

Local Education Agency

Environmental Sources

Business
Industry
Commerce
Community
etc.
for Sociological
Economic
Political
information

Figure II Flow of Information for Systems Planning for Vocational Education
Time, cost, levels of performance, and related information are basic considerations at all levels of planning and provide the common basis for the development of local applications and the State plan for vocational education. The systems approach to planning at all levels will insure compatible and mutually supportive program planning efforts.

A Program Planning Model

The systems approach to planning is developed in the form of a planning model as presented in Figure III. The model incorporates the systems approach to planning, identifies the necessary elements in the planning process, shows the interrelationships and interdependencies between and among planning elements, and portrays the flow of information inherent in a systematic planning effort. The model may also serve as the basis for planning organization, task assignments, and employment of other management and analytical tools. The intent of the model is to serve as a guide to a systems approach to program planning which is applicable to planning at any level.

This systems approach to planning and the planning model for the preparation of a State plan presented in this handbook provide one viable means to solve the problem of explicit planning and preparation of a State plan. The allocation of scarce resources to human efforts to achieve desirable goals necessitates a logical, rational, and systematic application of planning efforts. To assist the planner in the implementation of the planning model, a check list in outline form is presented in Appendix L as an example of a planning tool which can provide guidance to the planning effort. The systems approach to planning described in this handbook will serve as a valuable tool for the State and local agencies in their efforts to prepare a comprehensive State plan for vocational education.

Figure III A Systems Approach to State Plan Development for Vocational Education
The labor force in all States is becoming more diversified and its needs are becoming more clearly identified. The philosophy and practices of vocational education have broadened to incorporate the growing demands for jobs in agriculture, gainful occupations involving home economics skills, technician occupations, health occupations, trade and industry, sales and service, and business and office. There has been increased participation at the Federal, State, and local levels in vocational education. Occupational training programs of all kinds, public and private, are growing rapidly in all States. This is especially true in public education. The demand for funds to finance the construction of vocational education facilities and operation of new and expanding programs is increasing at a rapid rate. Other educational institutions and training agencies are also seeking various forms of increased public financial support. All of these must be considered if the vocational education needs of the people are to be met and the trained manpower demand by business and industry is to be satisfied. This requires planning of a long-range nature. Some kind of systems approach to planning is necessary if it is to be consistent, logical, economical, and provide for the continuity of programs, services, and activities necessary to meet the vocational education needs of people.

The systems approach to planning outlined in Chapter 4 of this publication and shown in Figure III, is used in developing the procedures in long-range planning in this chapter. This is only one of many systems that may be used in program planning.
Steps in Program Planning

The systems approach model used in this document involves a number of steps that must be followed in developing an effective long-range plan of vocational education. They are:

a. An assessment of the situation which includes (1) an analysis of manpower needs and job opportunities, (2) the availability of vocational education, and (3) the State's population relating to vocational education needs in the State
b. A determination of vocational education program needs which are to receive priority attention in terms of the target population, target areas, and program emphasis
c. A statement of vocational education objectives
d. A survey of alternative vocational programs, services, and activities
e. A plan for implementation of vocational programs, services, and activities in terms of the requirements for people, resources, facilities, equipment, materials, and other services
f. Preparation of a budget including the accounting, distributing, and auditing procedures
g. Evaluation of vocational education programs, services, and activities, and provision for feedback of evaluation results into program planning

Commitment

A commitment to a systems approach to State program planning is the beginning of the planning phase. All further activity is predicated upon this commitment. Without a commitment to vocational education by leaders in local communities and by leaders at the State level, who are responsible for State plan preparation, adequate plans to meet the vocational education needs of the people and the proper allocation of resources are not likely to evolve.

Assessment

The assessment of vocational education in the State calls for the collection and compiling of information. The responsibility for collecting this information is a staff function and should be assigned to some person or group of persons on the staff. This may be the Research Coordinating Unit or the statistical section of the staff in vocational education, or it may be necessary to establish a position or positions on the staff for this purpose.

Consideration should be given to the establishment of an information system and data collecting procedures which will provide information relevant
to the solution of problems in vocational education planning. The information system needs focus upon identification, collection, analysis, synthesis, and interpretation of data. The most common methods of obtaining data are surveys, including questionnaires and check lists; interviews, analysis of publications; and committee reports. Some of the sources of information are provided in Appendix M.

Analysis of Manpower Needs and Job Opportunities

State plan preparation requires:

that due consideration will be given to the results of periodic evaluations of State and local vocational education programs, services, and activities in the light of information regarding current and projected manpower needs and job opportunities, particularly new and emerging needs and opportunities on the local, State, and national levels, . . . Sec. 123 (6) (A), P.L. 90-576.

The analysis of the manpower needs and job opportunities will vary from State to State, depending upon the information available within each State. The Amendment provides for the State Employment Service, through agreement with the State Board for Vocational Education, to provide some of this information. The information secured from the employment service should be supplemented with information from other agencies and organizations concerned with manpower needs and job opportunities. The State Board must show the present manpower needs and job opportunities and project these needs to the future.

The suggested elements of necessary information for analyzing manpower needs are:

a. Nature of jobs by categories — supply and demand
b. Job entry requirements
c. Requirements for job advancement
d. Projection for job opportunities
e. Trends in the labor market
f. New and emerging jobs
g. Location of job opportunities
h. Types of related job opportunities in similar or related occupations

The following sources of information may be considered in assessing the manpower needs and job opportunities in any State:

a. Employment Service — Reports and Statistics
b. Manpower Reports of the President transmitted to Congress by the U. S. Department of Labor annually
c. U. S. Census of Population, Bureau of the Census, Department of Commerce
d. Comprehensive Area Manpower Planning Systems Reports

39
e. Manpower surveys made by organizations and agencies within the State
f. State Departments of Government; such as, State Department of Labor, Interior, Commerce, industrial Development, or other departments concerned with economic growth of the State
g. Reports from State Department of Education
h. Vital Statistics Report, State Department of Health
i. State and Federal Licensing Boards
j. Advisory and Trade Committees

Available Vocational Education Programs

The assessment of vocational education must include what is now being done in providing for the manpower needs and the preparation for job opportunities. This assessment must include information of what is being done in providing for the manpower needs and the preparation for job opportunities. This assessment must include information of what is being done in the public schools, private schools, military, and by business and industry and other users of manpower.

The information on what is being done in public schools can usually be obtained from public school records. In most States this information is available in the State Department of Education. It is not always easy to get the information from private schools, since in many states, they do not report to any State agency. In States where private schools are licensed, this information is usually available from the licensing agency. The securing of information from business and industry and other agencies, such as, governmental agencies including the Armed Forces, is not so easy to obtain. Vocational advisory committees or councils may have representatives from these organizations and agencies who could be used to help secure this information.

The staff charged with assembling this information must consider the vocational training done by business and industry, governmental agencies, and others who have manpower training programs. The Federal State Plan Guide is the format for compiling this information.

The types of information in determining the availability of vocational education programs include the:

a. Nature and location of educational programs, services, and activities, including general education, public and private vocational education, business and industry, and governmental education, including the military
b. Availability and allocation of resources including manpower and funds
c. Nature of the population served — this would include age, sex, educational and cultural backgrounds
d. Organizational structure of available educational programs and
general operational policies and practices
e. Status of available facilities, equipment, and material for voca-
tional programs

These types of information should focus upon the following elements of information necessary to prepare graphic or chart presentations of education resources:

a. Student
b. Faculty
c. Administration and Supervision
d. Organization
e. Programs, services, and activities
f. Nature, type, and number of offerings
g. Nature and extent of student groups being served
h. Vocational education outcomes
i. Resources and its distribution
j. Teacher preparation
k. Planning and controlling efforts
l. Evaluation activities

In addition to the sources of information described in the previous section, which are in general applicable to most information requirements, the sources below appear to be relative to educational resources:

b. Advisory committees
c. Parents
d. Community agencies
e. Educational institutions (private and public)
f. Professional organizations
g. Educational Resources Information Center
h. Other State and regional studies

Analysis of the State's Population Relating to Vocational Education Needs

Emphasis is placed on meeting the vocational education needs of all the people. This necessitates the securing of information on the vocational needs of all groups of people. This includes those in the secondary and post-secondary schools and adults who have left regular school program and who need additional education to upgrade them in their present job or to retrain for changing or new jobs. The types of information on human resources needed are their:

a. Interest, needs, and aspirations
b. Educational background
c. Population characteristics, (ability, attitudes, and aptitudes)
d. Ethnic or cultural background
e. Mobility pattern
f. Per capita or family income (economic status vs. cost of living)
g. Relief and welfare trends

The sources for securing information on the vocational education needs which may include those cited above are:

a. Social Security Administration
b. Public school records
c. State Employment Service records and reports
d. U. S. Department of Labor Manpower reports
e. Bureau of Labor statistics
f. Credit union and banks
g. Management and labor associations
h. Chamber of Commerce studies and reports
i. Insurance and real estate companies
j. Public health organizations
k. Reports from other State and Federal agencies dealing with human resources and population characteristics
l. U. S. Department of Housing and Urban Development

The Amendment makes it mandatory that consideration be given to determining the vocational education needs of the people, relative to economically depressed areas, areas with high rates of general unemployment, high rates of unemployment of youth, and high rates of school dropouts. The procedure for securing information on determining the extent of these areas will differ from State to State. Some of the possible methods are:

a. Economically depressed areas
   1. The measure used in identifying depressed areas under the Elementary and Secondary Education Act
   2. Certain regions or areas of States have been designated as economically depressed areas by certain governmental agencies (such as Education Professions Development Act, Model Cities, Appalachian Commission)

b. High rates of general unemployment
   The Employment Service of the Department of Economic Security or the State agency responsible for welfare and unemployment benefits of the State is usually the best source of information on the rates of unemployment. This information is usually available by counties. Employment surveys, if available from any reliable source, should be used.

c. High rates of youth unemployment
   The rates of youth unemployment are difficult to secure. These statistics may be available in the State Employment Service office or in the office of some other agency. Nationally, the rate for youth unemployment is considered to be about twice that of the
general unemployment rate. Where the rates of youth unemployment in a state are not available, the national ratio of general unemployment to the youth unemployment may be applied in the State.

d. High rates of school dropouts
   The school dropout record can be secured from the school records. These records are usually available in the State Department of Education or may be secured from the local educational agency's records.

Vocational Education Program Needs

Programs in vocational education are to be designed to insure education and training programs for career vocations. This make it necessary that the vocational education staff, in their planning, match programs with manpower needs and job opportunities and plan for any new or emerging occupation which may be anticipated in the State. The total of existing programs, regardless of where offered or by whom, must be considered. Plans should be made to provide programs where they do not now exist to meet the vocational education needs of persons of all ages.

Vocational education is to be made available to people in all parts of the State. The target areas to receive priority are:
   a. Areas that do not now have vocational programs
   b. Areas of high unemployment
   c. Economically depressed areas
   d. High mobility or migratory areas
   e. Seasonal employment areas

These target areas needs are to be considered in terms of the populations to be served by vocational education programs, services, and activities. These populations include:
   a. Disadvantaged
   b. Handicapped
   c. Secondary
   d. Post-secondary
   e. Adult

Existing programs must be evaluated in terms of meeting the vocational education needs of the people and a priority determined on the basis of these needs and existing constraints. This may mean the discontinuance of some existing programs and starting new ones which have a higher priority. The input of advisory councils, business and industry, and the results from student evaluations of existing programs should be a part of the criteria in determining the need for vocational education programs in a State.

Needs for vocational education must also be reflected in the nature of program emphases. Program emphases focus upon the economic consideration
growing out of the assessment and the educational concerns evolving from the analysis of the people to be served. Economic considerations in vocational program needs should deal with the job opportunities, the emerging skills, retooling or retraining for job mobility, and upgrading of present knowledge and skill in the form of continuing education. The development of vocational education program needs must also center upon the specific kinds of knowledge, skills, and attitudes needed to fully develop the student and meet occupational requirements. The examination of economic considerations and educational concerns will assist in the statement of more real and meaningful vocational education program needs.

Vocational Education Objectives

Perhaps the most critical step in program planning is to determine what the State should do in vocational education. State and Federal laws give direction, but the State staff with the assistance of all concerned with vocational education must chart the course and determine how to accomplish the purpose of vocational education. This is best done through the problem solving procedure with well defined objectives for programs, services, and activities. The Amendment requires that the State plan:

sets forth a program of vocational education objectives which affords satisfactory assurance of substantial progress toward meeting the vocational needs of the potential students in the State; . . . Sec. 123(a) (4) (D), P.L. 90-576.

The development and statement of vocational objectives is one of the most important tasks facing vocational education planners. Vocational objectives must tell what we are trying to do and where we are trying to go. They must be specific and measurable.

Objectives, missions, and goals are often used interchangeably. In this publication objectives are treated in three major groups:
The Ultimate Objective or Program Mission
Long-Range Objectives or Goals
Short-Range or Annual Objectives

Ultimate Objectives

The ultimate objective, or program mission as called by some, is a broad objective stating the purpose of vocational education. This purpose is declared by Congress in Title I, Part A, Section 101 of the 1968 Amendments to the Vocational Education Act of 1963.

The ultimate objective is derived from legislation and policies of the State. Each State should have an objective statement which has been developed by the vocational education staff with the help of others who have an interest in and concern for vocational education. Because legislation
and State policies change frequently, the ultimate objective or mission statement should be reviewed and revised frequently in terms of what the State intends to do.

Long-Range Objectives

Long-range objectives or goals are statements of anticipated accomplishments over a number of years, specifically five years, in Part II of the State plan. These objectives must be realistic in terms of the evaluation of existing programs as they relate to the vocational education needs of the people, plus an analysis of economic developments and the manpower requirements of the labor market.

Long-range objectives should:

a. Relate to the ultimate objective or mission of vocational education
b. Point the direction for future program development
c. Indicate the trend of vocational education in the State
d. Be based upon the need for vocational programs
e. Be broad in scope
f. Be ranked on the basis of priorities (a result of balancing needs and constraints)

These objectives should be developed in consultation with the State Advisory Council, State Employment Service, and other State agencies and non-State agencies who have a part in occupational education. An example of a long-range objective might be to “develop a comprehensive program of vocational education in the State to serve 50 percent of the students in secondary school in the State.”

Annual Objectives

Annual program objectives are statements of measurable output or accomplishments to be attained within the year covered by Part III of the State Plan — the Annual Plan.

The annual program objectives implement the long-range objectives and serve as the basis upon which the annual plan is developed. They project what the State will do during the year and in a way which can be measured at the end of the year. It is suggested that each State have specific objectives including objectives on:

a. Occupational and special programs to be made available to students
b. The number of adults to be served
c. The extent to which the vocational education program prepares workers for the labor market
d. Reconciliation of student’s interest and aspirations to the manpower needs and job opportunities
e. The development of cooperative education programs
f. The relevance of existing programs in terms of students' vocational needs and job opportunities

g. The need for expansion of existing programs and the development of new programs

h. The need for special programs, services, and activities for the handicapped and the disadvantaged

The annual objectives should:

a. Relate to the attainment of the long-range objectives

b. Indicate the degree of achievement

c. Be short-range and specific

d. Be observable and measurable

e. Have a time frame

f. Be ranked on the basis of priorities (revised in light of current situations)

Basically, to prepare a meaningfully stated objective that will succeed in communicating intent and serve as a basis for evaluation, they should answer the following questions:

a. What will the observable outcome be?

b. What are the important conditions under which the outcome is to occur?

c. What standard of performance will be employed to evaluate the outcome?

An example of an annual objective might be to "construct four area vocational schools during the year" or "graduate and place in employment 200 welders during the year." The annual objectives may be refined to the level of teaching objectives in behavioral terms.

Alternate Programs, Services, and Activities

Usually there are a number of ways of accomplishing or attaining a given objective. Although not required in the State Plan Guide, the planning process requires that these ways or alternatives be explored in order to arrive at the "best" possible means of achieving or reaching the objective. These alternatives may result from:

a. An innovation which is an outgrowth of imagination, ingenuity, and creativity

b. An adoption of previously existing programs, services, and activities

c. An adaption or modification of existing programs, services, and activities

The analysis of each alternative does not take place in isolation. It must be considered in relation to other alternatives. Some of the factors that must be considered in making a decision on the alternative to be selected are:
a. Cost-effectiveness of each alternative  
b. The resources needed in terms of manpower and financial support  
c. Evaluation of each of the alternatives in terms of the objectives

Cost-effectiveness analysis is applied to each alternative to determine its effectiveness and efficiency. Costs are estimated and effectiveness is obtained from subjecting the alternatives to real operational conditions through the use of models or simulation. Cost-effectiveness analysis needs to include those factors which are direct and indirect, current and future, as well as actual and estimated. Cost factors are always estimations based upon anticipated expenditures over a five year period. Cost factors also include maintenance considerations in addition to procurement and operation. Effectiveness is a matter of degree and is never absolute. It also includes intangible as well as tangible outcomes and implications.

Judgments are also made concerning each alternative based upon past experiences and expertise in light of real political, financial, and economic factors. These judgments will provide statements of feasibility, impact, and worth of each alternative.

Each analyzed alternative is then compared and evaluated against each of the other alternatives in relation to the objectives, priorities, and criterion measures. They are then ranked according to desirability and utility.

Finally a selection is made as to the alternative or set of alternatives to be developed and implemented. As the decision is made, justification for the choice is developed to support the selection.

Implementation Plan for Programs, Services, and Activities

While this section of the long-range plan is not included in the State Plan Guide, it is a necessary part of program planning to insure the attainment of stated objectives. The plan for projecting programs over a long-range period of at least five years makes it necessary that attention be given in each year of the plan to the:

a. Estimated enrollment by programs and by groups to be served  
b. Number of schools or agencies offering vocational education of all types  
c. Personnel requirements for programs, services, and activities, including numbers to be trained  
d. Facilities and equipment needed, including new facilities and new equipment  
e. Allocation of present or anticipated resources  
f. Time necessary to develop and put into operation revised or new programs, services, and activities

The ultimate objective in vocational education or the program mission should guide the State in planning programs of vocational education. Certain constraints, such as, lack of financial support, inadequate facilities,
or lack of trained personnel, must be considered especially in the earlier years of long-range plan. However, the planners should consider what is needed in the State to accomplish the ultimate objective and plan to progressively implement vocational programs to meet these objectives.

What, Why, How, Who, When, and Where kinds of questions must be answered before the selected set of alternatives can be put in operation. Effective implementation must be planned. The State plan will be integrated into on-going vocational education programs which will necessitate varying degrees of change and development. Procedures employed to implement the annual phase of the long-range plan should consider two fundamental approaches:

a. A form of field testing to include:
   1. Testing — a trail-run of new and revised programs, services, and activities
   2. Revision — to correct error or modify for improvement (pilot situation or simulation)
   3. Retest — to check out the effects of the revision if necessary

b. A sequence of implementing activities including:
   1. Dissemination — to describe and inform the user
   2. Demonstration — to show and train the user
   3. Integration — to place into the school and incorporate into on-going programs of vocational education

This complex operation necessitates the development and employment of a management plan. This includes provision for continuous planning, organizing, directing, and controlling.

The implementation plan has also to give consideration to operational concerns which will vary depending upon situation's characteristics; however, some examples of operational concerns would be:

a. Occupational categories — programs need to be compatible with occupational references in business and industry.

b. Educational levels — Programs, services, and activities will be influenced by the educational level at which they are offered and the students to whom they are offered.

c. Geographic location — factors of space, transportation, support, and others enter into planning for implementation.

d. Educational subdivisions — a functional and logical breakdown of content and skill development needs to be made in order to structure programs and courses.

e. Ancillary services — courses do not stand alone, they depend upon an extensive supportive system which must be inherent in a plan for implementation.

The first year of the long-range plan can be specific since the resources and constraints are known. The implementation plans for the other years are
based upon anticipations in terms of the objectives. It should be assumed that if the objectives are valid and the commitment to vocational education strong enough, any constraints, such as, lack of funds, personnel, or any laws or regulations restricting vocational education, will be removed. The need for vocational programs to implement the long-range objectives is one of the best ways to secure the necessary support for vocational education and for removing any restraints which may be present.

Budget Preparation

The estimated funding statement is a plan for the allocation of financial resources to vocational programs, services, and activities. The long-range (5 year) funding statement is based upon the stated needs and is formulated without the consideration of constraints. This document identifies the sources of funds needed and indicates how they are to be expended. The annual budget is a fiscal statement of anticipated expenditures based upon actual resources available. The budget document is a plan which is product-oriented and enables the decision-maker to cost the achievement of stated objectives.

The budget for the first year of the long-range plan is a plan for actual expenditures for the coming year based on actual financial resources available. It is specific and reflects the planned expenditures for each program, service, and activity. The estimated expenditures for the other years in the plan are based upon the needs for funds from all sources — Federal, State, and local — to support the needed vocational programs to meet the long-range objectives. If an effective and realistic job has been done in determining the long-range vocational objectives and planning programs to meet them, the task of allocating resources for those years is relatively simple. It merely consists of computing the estimate cost of each program, service, and activity and then arriving at a total cost for each year in the plan. The amount of funds anticipated from each source may be estimated on the basis of Federal and State laws authorizing appropriations, anticipated changes in these laws, and anticipated availability of funds from State and local sources. Planners should expect that if the need is great enough, the financial resources will be forthcoming.

An allocation plan is a part of the budget plan which describes and justifies the distribution of resources. Distribution procedures and allocation formula are major components of the allocation plan. An example is shown in Appendix, I and J.

Accounting practices and auditing policies are established to insure noncommingling of funds and provide for the control of expenditures as planned. Line item entries serve as the basis for this part of the budget plan. All budgeted expenditures must be time phased because of the annual funding policies of the Federal Government. In addition, this timing of expenditures will provide greater control and improved management.
Need for Evaluation of Programs, Services, and Activities in Planning

Each program should be evaluated in terms of its objectives. Once an evaluation has been made, the results are to be considered in determining the changes to be made in the objectives and programs, services, and activities to meet stated needs. The evaluation results are used to determine essential program changes by indicating the programs that should be expanded, dropped, or adjusted in order to attain the vocational objective.

A procedure for providing a feedback of the information on the evaluation of vocational education programs to program planners should be developed. This feedback of information is a very important source of information and is to be given consideration in any change of long-range objectives or change in vocational programs, services, and activities. Planners will have reliable information for reviewing, analyzing, and revising the State plan for the coming year once they have received the necessary feedback on the evaluation of current programs, services, and activities.

Annual Plan

The annual program plan is an essential part of the State plan which describes the program of vocational education for the coming year. It describes what is to be done in the State during the year and how it is to be done. The annual program plan is based on the first year of the long-range plan. If the first year of the long-range plan is realistic and the right objectives have been selected and properly stated, the writing of the annual plan will be much less difficult.

In writing the State plan, it is important that attention be given to the analysis of the annual objectives in terms of meeting the vocational needs of the people; the development of programs, services, and activities to meet the objectives, and the allocation of available funds.

Analysis of Objectives

The annual program plan is based on the annual and short-range objectives. If these objectives are well stated and based on the vocational education needs of people and are developed from current and reliable information, a sound framework has been established for developing the annual plan.

The evaluation of the objectives should be continuous throughout the year as a basis for the next year's annual program plan. This evaluation consists of an analysis of these objectives in terms of:

a. Relationship to the long-range objectives
b. Comprehensiveness in terms of meeting the total needs for vocational education programs, services, and activities
c. Probable attainment during the year
d. Their measurability
e. Priority rank
Development of Programs, Services, and Activities

Programs, services, and activities are developed to attain the objectives. The annual program plan spells out in tabular and narrative form the following:

a. Instructional programs planned by occupations
b. Number of programs
c. Location of programs
d. Number and kind of personnel to be employed
e. Estimated enrollment
f. Estimated number expected to complete training
g. Groups to serve; such as, secondary, post-secondary, adult, disadvantaged, and handicapped
h. Construction of area vocational school facilities
i. Provision of ancillary services; such as, administration and supervision, evaluation, teacher education and professional improvement, research and demonstration projects, and curriculum development

The vocational programs, services, and activities selected are subject to certain constraints which must be considered. These include, but are not limited to:

a. Federal and State laws
b. Rules, regulations, and policies of the State agency
c. Available financial resources
d. Availability of qualified personnel
e. Availability of facilities
f. Attitude of local educational agencies
g. Willingness of business and industry to cooperate

Allocation of Available Funds

The allocation of funds to vocational education programs, services, and activities is an important task in annual program planning. It is the responsibility of the State Board for Vocational Education and its staff to make such allocations. It requires wise decisions on the use of available funds to get the maximum benefits from them. Constraints sometimes limit decisions on their use. The Federal Amendment and Rules and Regulations specify how the Federal vocational funds may be used. State laws and the State's budgets for vocational education may place restrictions on the use of State funds. Local agencies usually must consider priorities in the use of funds available to them from local sources. All these must be considered in the allocation of funds for vocational education purposes. The annual plan shows the allocation of funds and their sources under the 1968 Amendments for the following:

a. Programs, services, and activities for Part B purposes
b. Research and training for Part C
c. Exemplary programs and projects for Part D
d. Residential schools for Part E
e. Consumer and Homemaking programs for Part F
f. Cooperative Vocational Education programs for Part G
g. Work Study programs for Part H

Local Agency Applications

The development of the State's annual plan depends on reliable data and on the intentions of local educational agencies in conducting programs of vocational education. Local educational agencies include local boards of education, area vocational schools, community colleges, institutions of higher education, and other public institutions offering vocational education programs eligible for financial support under the State plan. The applications from local education agencies for vocational programs, services, and activities are one of the important sources of information for developing the State program plan. These applications are based on local needs for vocational education programs.

The procedures used in developing the State's annual plan should be used by the local agency in developing its application. The format for developing local applications is outlined in the application form supplied by the State (Appendix K is an example).

Many small local educational agencies do not have all the information needed for preparing their application and must depend on the State agency for help.

The local application is the local educational agency's annual plan for vocational education and shows what is to be done and the allocation of resources to it.

Careful review of local applications for vocational programs by the State staff is required to see that these programs contribute to the State's annual objectives and that all phases of vocational education are being considered. It might be necessary for the State program planners to stimulate and encourage local agencies to expand programs or develop new ones to meet the vocational education needs on the local and State level.

Ancillary Services

The State program planners for vocational education must, in addition to the programs proposed in the applications from local agencies, provide in the annual program plan the ancillary services needed to carry out an effective and efficient program of vocational education in the State. The ancillary services which must be provided include:

a. Necessary administration and supervision
b. Provision for teacher education and professional improvement
c. Research, development, training, demonstration, and dissemination efforts

d. Guidance services

e. Curriculum development and preparation of instructional materials

f. Evaluation of programs, services, and activities

The provisions for the necessary ancillary services include the provisions for necessary staff at all levels and in all services, arrangements for facilities, equipment and supplies, and allocation of adequate funds for these services.
Planning is a specialized endeavor requiring technical competencies. Planning is recognized as an indispensable activity in the management of vocational education program development. Planning does not occur by chance, it has to be an intended activity. It consumes time and resources and has an identifiable level of attainment. However, if planning as proposed in this handbook is to be comprehensive and systematic, it will require specialized capabilities. Therefore, attention should be given to the establishment of a planning unit to meet the specific needs of the planning effort. The planning unit would:

a. Coordinating interagency planning education efforts
b. Coordinate the development of plans for vocational education
c. Assist in the conduct of evaluation and operation of information systems

The unit could be composed of interdisciplinary and systems-oriented professional staff. This staff would serve as the core of the planning and reporting efforts within the State.

A planning unit can focus upon major concerns related to all levels of vocational education activity. Their concerns include:

a. Recognition of scope of planning needs
b. Achievement of comprehensive planning activities and Statewide integrated planning efforts
The organization of a planning unit should focus on a core of specialists interacting with functional or service area specialists to form viable task forces to execute planning endeavors. The planning unit should be oriented to the decision-making function of the agency.

The unit should address its operation to:

a. Coordinating interagency
b. Developing of master plans
c. Liaisoning with all levels of planning with the State
d. Relating to external planning enterprises (other States, U. S. Office of Education, etc.)
e. Conducting training of planning specialists
f. Cooperating in the operation of management information systems (MIS)

For a planning unit to be effective, it must be directly related to the chief decision-maker and have clear lines of communications and responsibilities with major administrative units. Planning must be viewed as an integral aspect of all administrative activity at the State level. The planning unit needs to relate directly to and with all vocational education organizations within the State.

Some suggested sources of information dealing with planning units are:

Bernar S. Fuse, Project Director
Seven-State Project, Comprehensive Planning in State Education Agencies
1400 University Club Building
Salt Lake City, Utah 84111

Hal E. Hagen, Director
Institute for State Educational Planners
Mankato State College
Mankato, Minnesota
Appendix B

State Advisory Council

State Board of Education

Superintendent of Public Instruction and Executive Officer of the State Board

Assistant Superintendent of Public Instruction

Vocational Education

Deputy Division for Vocational Education

Program Planning, Development, and Implementation Unit

Adult Basic Education
Agricultural Education
Business and Office Education
Health Occupations Education
Home Economics Education
Technical Education
Trade and Industrial Education
Special Programs

Program Operations Unit (Administration)

Direct Program Operations
Supportive Program Operations
Personal Services

Supporting Services Unit (Administrative)

Teacher Education and Supervision
Vocational Guidance Services
Instructional Materials Development
Research and Development
Computer and Statistical Services
State Program Evaluation

Supervisor of Regional Vocational Education Programs, Services, and Activities

Regional Advisory Committee

Committee of Vocational Programs, Services, and Activities

Elementary Schools
Secondary Schools
Technical Institutes
Colleges and Universities

*Includes: Demonstrated, Endorsed, Elementary, Work-Study, Cooperative Vocational Education
**Includes: Education Preparation Development, Exchange Program for Professional Development, Vocational Cooperative Program for Teacher Education
***Includes: Vocational Education Region which includes one or more Economic Development Districts
Appendix C

ORGANIZATION AND USE OF THE STATE ADVISORY COUNCIL FOR VOCATIONAL EDUCATION

Provision

The Amendment states that:

"any State which desires to receive a grant under this title for any fiscal year shall establish a State advisory council, . . ." Part A, Section 104 (b) (1), P.L. 90-573.

Certification of the establishment and membership of the State advisory council must be submitted to the Commissioner of Education not less than ninety days prior to the beginning of any fiscal year ending after June 30, 1969, in which the State desired to receive a grant under this title. (Part A, Section 104, (b) (2))

Membership

Appointment. The State advisory council shall be appointed by the Governor or, in the case of States in which the members of the State board are elected, by such board. (Part A, Section 104 (b) (1))

Representation. The State advisory council shall include as members a person or persons who are representative of certain institutions, organizations, or agencies, or who are familiar with the needs for and programs of vocational education in the State. Specific requirements for membership are found in Part A, Section 104 (b) (1) (A) of the Amendment.

Size. The State advisory council should have an adequate number of persons to meet the representation requirements of the Amendment, yet a small enough number of members to function efficiently. Generally, a group of twenty persons can meet both of these criteria effectively.
Term of Office. The term of membership on the State advisory council is left to the discretion of the appointing authority. However, the provision for the National Advisory Council on Vocational Education, set forth in Part A, Section 104 (a) (1) of the Amendment, may serve as a guideline. Members of the National Advisory Council serve for three years, with one-third of the total membership being appointed each year.

Responsibilities

Function. The State advisory council shall:

(1) "advise the State board on the development of and policy matters arising in the administration of the State Plan submitted pursuant to part B of this title, including the preparation of long-range and annual program plans pursuant to paragraphs (4) and (5) of section 123 (a);

(C) evaluate vocational education programs, services, and activities assisted under this title, and publish and distribute the results thereof; and

(B) prepare and submit through the State Board to the Commissioner and to the National Council an annual evaluation report, . . . “ Part A, Section 104 (b) (1), P.L. 90-576.

Of these functions, the one which is most likely to be significant is the annual evaluation report. This report must evaluate the effectiveness of vocational education in terms of the annual and long-range plans for vocational education in the State. In addition, it will recommend changes in programs, services, and activities which seem to be called for as a result of the evaluation.

The Congress has provided each State advisory council the right to employ a staff and to contract for services needed in meeting its responsibilities. As much as 150 thousand dollars per year would be available for the State advisory council in some States to carry out these activities if full appropriations are provided. These funds would permit the State advisory council in a large State to budget for items, such as, executive secretary, a vocational education specialist, a labor economist, a secretarial and clerical staff, office expenses, expenses for meeting of State Advisory Council, and a budget for contractual services, such as, collection of data, analysis, report writing, and publication.

A State advisory council which can devote its attention to policy formation and a council staff which can concentrate on evaluation can accomplish very much. The financial assistance provided the State advisory council will aid greatly in conducting the functions specified.

The annual evaluation report which must be submitted by the State
advisory council should cover a period from approximately June 15 of one year to the same date the year following, and should be completed by approximately October 1. If the State Board of Education could consider this report and pass it on to the National Council within a month, recommendations could be made to the Congress near the beginning of its new term at the start of the calendar year.

The State advisory councils are an essential source of new expertise on the development of new vocational programs and the more effective redirection of existing programs to greater relevancy. The councils should be independent evaluators of the effectiveness of programs within the States and independent commentators on the advisability of the provisions of the State plans. This independence, especially from State department of education, is essential if the councils are to make sound objective judgments. In order to insure this independence, State directors of vocational education and other State department of education personnel should be excluded from membership on the councils. Funds appropriated for the councils should go directly to the councils from the U. S. Office of Education to be used at the sole discretion of the councils for the employment of staff, evaluation, and other studies.

Liaison should be maintained with the Research Coordinating Unit in each State to insure that longitudinal follow-up studies of a sample of students are carried out regularly. In collection of data, it is to be hoped that information will be obtained regarding every type of occupational education rather than just those programs funded under the Vocational Education Amendments of 1968. Intelligent evaluation or planning cannot be accomplished without information about private industry programs, private school training, non-reimbursed occupational education in the public schools, and the whole host of Federally supported manpower development programs.

The Commissioner of Education is authorized by Federal legislation to pay each State advisory council those reasonable amounts which have been expended in the performance of its duties.

Accountability in education is just beginning. The mandatory annual evaluations of vocational and technical education in a State should provide a rationale and a variety of techniques which will be useful in evaluating all of education. Moreover, if it appears that benefits accrue from such evaluation, adoption of evaluation for other fields of education is likely to be hastened.

To carry out the functions specified in the Amendment and to be effective in their operation, the State advisory council must establish and maintain sound relationships with the State Board of Education and the State Department of Vocational Education. The advisory and reporting procedures of the State advisory council must be established in conjunction with the
State Board of Education. Open communication must exist between the members of the State advisory council, the council staff, the State Board of Education, and the members of the State Department of Vocational Education. The State advisory council must be made aware of the emerging problems and issues confronting the State Department of Vocational Education if they are to be most effective in accomplishing their task.

Meetings and Organization

"Each State Advisory Council shall meet within thirty days after certification has been accepted by the Commissioner and select from among its membership a chairman. The time, place, and manner of meeting shall be as provided by the rules of the State Advisory Council, except that such rules must provide for not less than one public meeting each year at which the public is given opportunity to express views concerning vocational education." Part A, Sec. 104 (b) (3), P.L. 90-576.
Appendix D

COOPERATIVE AGREEMENT
between Public Employment Office
and State Board for Vocational Education

In order to provide vocational training and retraining for persons of all ages in all communities of the state which is realistic in the light of actual or anticipated opportunities for gainful employment, the State Public Employment Service and the State Board for Vocational Education hereby agree to the following:

**Public employment offices** shall provide the State Board for Vocational Education and local boards of education available information dealing with (a) job opportunities in the community and elsewhere, (b) information regarding job requirements of occupations, (c) aptitude tests and other assessment instruments, and (d) such other information as may advance the mutual interest of the program.

**Boards of education** will provide information to the public employment offices on the type of courses available, where given, length, starting dates, and other factors necessary in counseling and in referring applicants to local vocational education programs.

**Public employment offices** shall arrange for referral of applicants from their files to the public vocational education program for training consistent with their interest and aptitudes.

**Boards of education** will arrange for the referral of school dropouts and graduates (for whom placement has not already been arranged) to the public employment offices for counseling and placement services. In addition, pertinent information about individuals seeking employment will be provided.

**Public employment offices** shall arrange for counseling, testing, and placement services to school dropouts, those who have completed training, and others needing training and retraining to assist them in obtaining suitable employment.

Superintendent of Public Instruction
State Director for Vocational Education

Commissioner Economic Security
Director State Employment Service
Appendix E

MEMORANDUM OF UNDERSTANDING
among
Bureau of Vocational Education
Bureau of Rehabilitation Services
Bureau of Instruction, Division of Special Education
of the State Department of Education

This memorandum of understanding is made for the purpose of assuring coordination and re-enforcement of team effort among the units involved to the end that effective programs, services, and activities shall be assured for the handicapped. It is understood that this effort will be made in the following ways:

1) Annual review of provisions in the State Plan for the vocational education of the handicapped;
2) Planning and development of appropriate programs, projects, and/or services to meet the vocational needs of the handicapped;
3) Review of applications for programs, projects, and/or services providing benefits to handicapped persons;
4) Development of appropriate inservice training for staffs, counselors, and teachers for the handicapped; and
5) Provision for adequate communication to facilitate program planning, development, implementation, and evaluation.

This understanding is entered into this 1st day of July, 1969, and will remain in force until it is terminated, revised, or amended by mutual consent.

Superintendent of Public Instruction
State Director for Vocational Education

Assistant Superintendent for Rehabilitation Services
Assistant Superintendent for Instruction
Appendix F

COOPERATIVE AGREEMENT
between State Department of Corrections
and Bureau of Vocational Education

The Bureau of Vocational Education agrees to cooperate with the Department of Corrections in providing vocational education programs for inmates in correctional institutions and to parolees and probationers who are under the supervision of the Department of Corrections.

It is understood by the agencies that vocational education programs, services, and activities for those in correctional institutions, parolees, and probationers may be developed as the needs and eligibility are identified and as funds are available for them. Further, vocational education ancillary services will be utilized to assure that these will be quality programs. Such services include teacher training, research, curriculum development, curriculum materials, guidance and counseling, and program evaluation. The Department of Corrections will provide whatever supportive services that may be required for the establishment and operation of the programs.

Personnel of both agencies will cooperate at all levels of program planning, development, and implementation in making meaningful vocational experiences available to these disadvantaged persons to the end that effective programs, services, and activities will be assured.

This agreement will remain in force until it is terminated, revised, or amended by mutual agreement.

Signature of Superintendent of Public
Instructor

State Director for Vocational
Education

Commissioner
Department of Corrections
Appendix G

COOPERATIVE AGREEMENT
between State Department of Child Welfare
and Bureau of Vocational Education

It is agreed that:
1. The Department of Education, Bureau of Vocational Education, and the Department of Child Welfare, through their executive heads, and the various divisions and bureaus of each organization, will seek to establish and maintain a high degree of cooperation in all matters of mutual concern for the benefit of disadvantaged and handicapped youth.
2. Each of the departments will freely exchange information about subject youngsters, their special needs, and any resources that are, or may be, made available to meet those needs. This would include identification and assessment of individual needs.
3. Cooperative planning and development of appropriate joint vocational education programs, projects, and/or services will be undertaken which will include development, implementation, and evaluation.
4. Joint participation in research activities as part of innovative and exemplary programs will be undertaken.
5. Appropriate inservice training for staffs, counselors, and teachers will be developed.
6. Jointly the two departments will prepare and/or review applications for funding appropriate programs, projects, and/or services. Separately the departments will devote such revenues as are available to each which are legally applicable to mutually selected programs.
7. In addition to this general agreement to seek cooperative solutions to common problems, specific amendments to this agreement will be written for ongoing joint programs, projects, or services as well as for such undertakings that may be attempted in the future.

This declaration of intent is made on September 2, 1969, and will remain in force until it is terminated, revised, or amended by mutual consent.

Superintendent of Public Instruction

State Director for Vocational Education

Commissioner, Dept. of Child Welfare

Director, Division of Institutional Services

Director, Division of Community Services
Appendix H

COOPERATIVE AGREEMENT
between State Department of Mental Health
and Bureau of Vocational Education

Purpose:

The purpose of this agreement is to assure continuing cooperation between the two agencies in implementation, carrying out of planning, and other necessary steps in providing vocational education which is of high quality for mentally and seriously emotionally handicapped youths and adults.

It is understood by both agencies that the need for vocational education programs, services, and activities is to be clearly identified and eligibility established in order that vocational funds may be available in accordance with the priorities of the legislation.

Personnel of both agencies will cooperate at all levels in making available supportive services necessary to assure quality vocational education for the mentally and emotionally handicapped.

Joint provisions for adequate communication to facilitate program planning, development, implementation, and evaluation will be made.

This agreement will remain in force until it is terminated, revised, or amended by mutual agreement.

Coordinator
Division of Mental Retardation

State Director for Vocational Education

Commissioner
Department of Mental Health

Superintendent of Public Instruction
Appendix I

Allocation of Funds for Programs, Services, and Activities

Federal Funds
(100%)

1. Overall Distribution

(1)

- Regular High School 25%
  (16)
- Regular Adults 12%
  (4)
- Handicapped 10%
  (3)
- Construction of Facilities 10%
- Ancillary Services and Activities 11%

   Ancillary Services and Activities (11%)

   - Administration and Leadership 4%
   - State Advisory Council 1%
   - Special Demonstration and Experimentation 1%
   - Program Evaluation and Dissemination 1%
   - Teacher Education and Supervision 2%
   - State Plan Development 1%
   - Instructional Materials Development 1%

2. Local School Districts
   Local Tax Supported 32% total

3. Local Educational Agencies
   State Supported 46% total

Instructional Programs 77%
Appendix J

Formula for the Allocation of Funds to Local Educational Agencies

(1) District Measure of Manpower + Needs and Job Opportunities

(2) District Measure of Vocational + Education Needs

(3) District Measure of Reasonable Local Tax Effort

(4) District Measure of Relative Cost of Programs, Services, and Activities

Divided by 4

(5) District Measure; (then) (6) Add all of the district measures to get a “Total for the State”; (then)

(7) District Measure Total for the State

(8) District Apportionment Factor for Part B Purposes (Public Law 90-576)

(a) Equal weight is given to the four elements in the formula.

How to Calculate Each Part of the Formula

1. District Measure of Manpower Needs and Job Opportunities
   
   (a) County Measure of Job Opportunities = \( \frac{\text{County Total of Nonprofessional Workers}}{\text{State Total of Nonprofessional Workers}} \)
   
   (b) District Share of County Measure = \( \frac{\text{Total District School Population}}{\text{Total County School Population}} \)

   School population in a county and in a school district within a county is considered to be a reliable statistic in estimating the total population on the basis of “persons per school child.” It is relatively stable within a county.
School district measures summed for all districts within a county will add to the county measure; county measures summed for all counties within the State will add to 1, which is the State total.

2. District Measure of Vocational Education Needs

(a) Steps Involved

(1) Estimate of the Need of High School Students for Vocational Education = \[ \frac{\text{High School Student Population in the District}}{\text{Total District Adult Population, 20 to 65}} \times \text{Proportion of High School Students Going into Vocations} \]

(2) Estimate of the Need of Unemployed Adults for Vocational Education = \[ \frac{\text{General Unemployment Rate for the County}}{\text{Total District Youth Population, 15 to 19}} \times \text{Youth Unemployment Rate for the County} \]

(3) Estimate of the Need of Unemployed Youth for Vocational Education = \[ \frac{\text{Youth Unemployment Rate for the County}}{\text{Total District Youth Population, 15 to 19}} \times \text{Total District Youth Population, 15 to 19} \]

(b) Estimate of the Total Vocational Education Needs for a District = \[ \text{(2(a)(1) + 2(a)(2) + 2(a)(3))} \]

(c) Estimate of the Adjusted District Vocational Education Needs = \[ \frac{\text{Estimate of the Total Vocational Education Needs for the District}}{\text{State Median Income}} \times \text{County Median Income} \]

(d) Add the "estimate of the adjusted district vocational education needs" for all districts to get the estimate of the State total vocational education needs

(e) District Measure of the Vocational Education Needs = \[ \frac{\text{Estimate of the Adjusted District Vocational Education Needs 2(c)}}{\text{Estimate of the State Total of Vocational Education Needs 2(d)}} \]
A school district's measure of the vocational education needs is the proportion of the total State vocational education need accruing to it.

3. District Measure of Reasonable Local Tax Effort

District Measure of the Reasonable Local Tax Effort = Basic Foundation Program Calculation

District Allotment of Funds under the Basic Foundation Program Calculation

4. District Measure of Relative Cost of Programs, Services, and Activities in Relation to Average Daily Attendance

(a) District Equalized Current Expenses = District Current Expenses + State Average per Pupil Current Expenses

(b) District Measure of Relative Cost of Programs, Services, and Activities

District Equalized Current Expenses = State Total Equalized Current Expenses
Appendix K

Instructions for Submitting A Local Plan for Vocational Education

Remove this page before submitting local plan.
Prepare two copies: Keep one; forward one to regional coordinator.

1. Local Application (General Section)
   Statement of Assurances — The school administrator must sign this page after the local plan has been completed.
   Population Information — Most of this information can be secured from the Appendix of the Handbook. Additional information may be added from local sources.
   Employment Information — Some of this information may come from the Handbook; other information may be secured from local sources such as the employment office.
   Educational Information — Although much of this information is summarized in the Handbook, the local educational agency would be the best source of information.
   Analysis of General Information — Identify those communities or agencies who assisted in analyzing the data. Then briefly summarize the analysis of this information and the direction it gives for programs.
   Program Objectives — Read Chapter I of the Handbook and answer the questions in developing a mission statement and long-range goals.
   Summary of Instructional Program Information — This one page gives a summary of schools, teachers, programs, and estimated enrollment and completions for the entire school district. Complete the summary after each program plan is completed.
Budget Summary for School Districts — This one page (or more if there are more than three high schools in the district) gives a summary of the requested budget and source of funds. This summary should be most valuable to school administrators in allocating resources to programs and reviewing priorities of funding.

2. Local Application (Program Plans)
Prepare a program for each vocational program area within each school. If the program is already in operation, the program plan should be developed by the vocational teachers in that program and coordinated with the total planning committee. Each program plan will be attached to a budget for that program and included as a part of the total local plan.

3. Budgets
See separate sheet for completing budget forms.

LOCAL PLAN FOR VOCATIONAL EDUCATION
Fiscal Year
FOR
School District County
FOR
FISCAL YEAR

STATEMENT OF ASSURANCES
The applicant hereby assures the State Board of Education of the following:

1. The local plan for vocational education has been developed in consultation with representatives of the educational and training resources available to the area to be served.

2. Federal funds made available will be used so as to supplement and to the extent practical, increase the amount of local funds that would in the absence of federal funds be made available, and in no case supplant such local funds.

3. Federal funds will not be used for any programs of vocational education (except consumer and homemaking education) which cannot be demonstrated to (a) prepare students for employment or (b) be necessary to prepare individuals for a successful completion of the vocational program or (c) be of significant assistance to individuals enrolled in making an informal and meaningful occupational choice.

4. Adequate facilities and equipment are, or will be, available to conduct the programs projected.
5. The applicant will make an annual evaluation report and such other reports as may be reasonably required by the State Board.

CERTIFICATION

I do hereby certify that the above assurances will be complied with and programs, services, and activities approved will be conducted in accordance with the Acts, Regulations, and the State Plan for Vocational Education.

I further agree that funds will be used as stipulated in the application and supporting documents for expenditures will be maintained for credit.

I further agree that our local fiscal effort for the year covered by this plan will be maintained at a level at least equal to the preceding fiscal year.

I hereby certify that to the best of my knowledge all information contained in this application is true and correct.

______________________________
Local Educational Agency

______________________________
Superintendent

______________________________
Date

I. General Information Needed for Planning Local Vocational Educational Programs:

A. Population Information

1. Is the county population increasing ___ or decreasing ___? % change 1960-1970 ___; 1970-1975 ___

2. What is the estimated county population for 1970? ___

3. How many people are in the following age groups? (1970)
   15-19 ___; 20-24 ___; 25-64 ___; 65 and over ___

4. What is the per capita income in the county? ___

5. Is the county designated as an Economic Development Area? Yes ___ No ___

6. Is the county one of the 49 counties designated as an Appalachian county? Yes ___ No ___

7. Use the following space to note any additional population information which may be important in developing the local plan.
   (Note: Write-in space has been omitted to reduce pages in handbook.)

B. Employment Information

1. What is the total work force in the county (1969)? ___

1Most of the information required in this section can be found in the appendix of the "Handbook for Planning Local Vocational Educational Programs."
2. What is the total employment in the county (1969)?

3. What is the unemployment rate in the county (1969)?

4. How many persons are employed in the following categories?
   (1969)
   Agriculture ________ Manufacturing ________
   Government ________ Other ________

5. What employment opportunities are available in the county or within commuting distance?

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6. How many workers commute outside the county for employment? Where do they work?
   (Note: Write-in space has been omitted to reduce pages in handbook.)

7. Use the following space to note any additional employment information which may be important in developing the local plan:
   (Note: Write-in space has been omitted to reduce pages in handbook.)

C. Educational Information

1. What other agencies are providing vocational education programs to persons in the area served by this local educational agency?
   (Note: Write-in space has been omitted to reduce pages in handbook.)

2. What is the present school enrollment (grades 9-12)?

3. What is the projected enrollment (grades 9-12) for 1975?

4. What is the holding power of the school district?
   No. of ninth graders (1965-66) ________
   No. of graduates (May, 1969) ________
   % of ninth graders completing high school ________

5. What are the major reasons for students not completing school?
6. How many 1969 graduates are attending college? In Kentucky?

________________ Out of State ___________ % of graduates attending college ___________ % of 1965-66 ninth graders attending college in 1969-70 ___________

7. Number of high school students from low income family?

________________ % (As identified by Title I criteria)

8. How many high school age handicapped persons are in the school district? 
   Mentally retarded ____________  Crippled ____________
   Cerebral palsied (Spastic) __________ Cardiac __________
   Epileptic ________ Blind ________ Partially seeing ________
   Deaf ________ Hard of hearing ________ Speech defect ________
   Non-classified __________ Total handicapped __________

9. Use the following space to note any additional educational information which may be important in developing the local plan:
   (Note: Write-in space has been omitted to reduce pages in handbook.)

II. Analysis of General Information
   A. What consultants, advisory committees, and/or agencies were contacted for advice in analyzing the data and recommending the local program of vocational education?
   (Note: Write-in space has been omitted to reduce pages in handbook.)
   B. Summarize pertinent information (population, employment, and education) that points direction for the kind of vocational education programs needed.
   (Note: Write-in space has been omitted to reduce pages in handbook.)

III. Program Object
   A. What is the local educational agency's educational philosophy including vocational education? (Mission Statement)
   (Note: Write-in space has been omitted to reduce pages in handbook.)
   B. What are the long-range plans for maintaining, extending, and improving existing programs and developing new programs of vocational education? (Long-range Goals)
   (Note: Write-in space has been omitted to reduce pages in handbook.)
## IV. SUMMARY OF INSTRUCTIONAL SCHOOL DISTRICT

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**TOTALS (Unduplicated)**

Reg. — Regular Students  D — Disadvantaged Students  H — Handicapped Students  S — Secondary
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PS — Post Secondary
A — Adult
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*OR SCHOOL DISTRICT*
A SAMPLE OF A PROGRAM AREA APPLICATION

VOCATIONAL EDUCATION PLAN FOR PROGRAMS AND/OR SERVICES FOR THE DISADVANTAGED FOR FY_____

School__________________________________________________________
School District or Local Educational Agency________________________
Duration: Beginning Date_________________ Ending Date__________

1. Descriptive Title of Program:

2. Statement of Objectives:
   These should be sharply defined, stated in performance terms, and related to program and/or service evaluation

3. Need for Program:
   Briefly state the need for program and/or service for the disadvantaged in your school

4. Procedures:
   Describe the major elements of the operational plan to include general design, methods and techniques, and equipment and facilities which, if incorporated, would be unique for working with disadvantaged persons in this program and/or service

5. Describe special plans for evaluating the results of the program and/or service
6. Number and Characteristics of Persons to be Served:

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Totals (Unduplicated)
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Instructions for Preparing Budgets
For Vocational Education

1. Prepare the Budget Request Form with the applicable backups for each vocational program in each high school.
2. Prepare two copies of the budget forms; retain one copy in the school district and forward the original copy with the program application form to the reimbursed coordinator of vocational education.
3. For budget purposes, round all figures to the nearest dollar.
4. Budget Request
   a. Check only one block in the vocational program area. This is to indicate the source of funds to be used to support the vocational education program. If special program or cooperative money is to be used, but the program is entirely in one of the vocational program areas, please specify the program area in the Special Program or Cooperative block.
   b. In the Summary of Funds Requested, place the item of expense on the appropriate line and in the appropriate column. Summarize totals to the right side and at the bottom. Each entry on the Summary of Funds Requested must be identified on one of the five budget backup sheets.
   c. Leave Summary of Funds Approved blank. This will be completed by the Bureau.
5. Budget Backups
   a. No. 1 — Adult Programs — Use this form only for adult vocational programs. Check the appropriate vocational program area. Complete all blanks which apply to the particular adult vocational program.
   b. No. 2 — Personnel Salaries — Use this form to request personnel salaries in programs other than the adult programs. THIS SHOULD NOT INCLUDE SALARIES PAID BY THE FOUNDATION PROGRAM. Check the appropriate vocational program area. Supply the information requested on personnel. Under present policy, this
budget backup should only be used for Part B special programs, Part D, and Part G.
c. No. 3 — Travel — Check the appropriate vocational program area. Up to three teachers securing funds under the same program area may use this form. Put the totals per teacher at the bottom of the page and the totals of all teachers to the right side.
d. No. 4 — Operating Expenses — Use this budget backup for requesting funds for operating expenses other than travel. Check the appropriate vocational program area. Under present operating policies, this budget backup should only be used for Part B special programs, Part D, and Part G.
e. No. 5 — Capital Outlay — Use this form to request items of equipment to be used in vocational programs. Check the appropriate vocational program area. Leave the columns headed “Action” and “Amount Approved” blank for use by the Bureau.
f. Use only those budget backups which are required to justify expenditures on the Budget Request Form. Attach the budget backup forms to the Budget Request.
Budget Request
Fiscal Year 19_

BOARD OF EDUCATION

SCHOOL

REGION

CHECK APPROPRIATE VOCATIONAL PROGRAM

PART B — REGULAR PROGRAMS

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<thead>
<tr>
<th>Category</th>
<th>Secondary Costs</th>
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<td>Health Occupations</td>
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<td>Trade &amp; Industry</td>
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SUMMARY OF FUNDS REQUESTED

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<td>OPERATING COSTS:</td>
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<td>Teaching Aids &amp; Supplies</td>
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<td>CAPITAL OUTLAY:</td>
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<td>Equipment — Sub-Total</td>
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TOTALS
Prepare 2 copies for each Vocational Program Area in each school

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<th>AREA (check only one item)</th>
<th>PART B — SPECIAL PROGRAMS</th>
<th>PART F — CONSUMER &amp; HOMEMAKING</th>
<th>PART G — COOPERATIVE</th>
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(Use Budget Backups as needed)

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87
### SUMMARY OF FUNDS APPROVED (LEAVE)

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<th>Program Level</th>
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<td>Totals</td>
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**REQUESTED:**

__________________________
Department Chairman or Teacher

__________________________
School Principal

__________________________
Superintendent
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<th>Capital (600)</th>
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RECOMMENDED:

______________________________
Division Director

APPROVED:

______________________________
Assistant Superintendent for Vocational Education
# Appendix L

## Planning Checklist

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<td>C. Educational Resources</td>
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<td>F. Inventory Control</td>
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<td>G. Auditing Policies</td>
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<td><strong>VIII. Accountability Plan</strong></td>
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<td>C. Justification and Change Process</td>
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Appendix M
Sources of Planning Information

Federal Agencies

(1) United States Department of Agriculture. Statistical Reporting Service
Washington, D. C.
Population and rural development. Commodity trends. Occupations,
levels, requirements and salaries. Farm population, employment, and
levels of living. Employment opportunities and competencies needed in
farm and non-farm agricultural occupations. Publications: Agricultural
Statistics and Technical Bulletins.

(2) United States Department of Commerce. Economics Development Ad-
ministration. Washington, D. C.
Census of population; Education; Race; Parentage; Occupation;
Earnings. Population mobility. Occupational characteristics, earnings
and education. School enrollment; Education and socio-economic
status. Publications: Growth Patterns in Employment by County;
Economic Development Administration.

(3) United States Department of Health, Education and Welfare, Bureau
of Research. Office of Education. Washington, D. C.
Federal programs and activities in the field of education. Information
on office planning and action in research, services, and grants. Laws
Journal, Digest of Educational Statistics, Division of Vocational and
Technical Education of the United States Office of Education: Allo-
cation of Federal funds, State plan standards and regulations. Program
standards. Materials relating to program organization, curriculum
guides in specialized areas, and bulletins and studies in a variety of
vocational education areas.

(4) United States Department of Labor, Employment Service Statistics,
Washington D. C.
Labor market projections, reports on technological and occupational
trends, economic studies and forecasts, early warning reports on major
occupational changes. Area trends in employment and unemployment.
Manpower development and training and apprenticeship training
programs. Publications: Occupational Outlook Handbook; Occupational

(5) Regional Development Commissions — Appalachian, New England,
Ozarks, Upper Great Lakes, Coastal Plains, and Four Corners.
Regional development projects on education, manpower, health, indus-
try, housing, transportation, resources, and environmental improve-
ment.
State Agencies

(1) State Department of Education. Statistical Information Service.
State educational characteristics: student population, projections, and patterns. Teacher population by educational service, level, sex, age, salaries, general and specific projections, demand and supply. Educational facilities by educational level and area. State and local needs and development.

(2) State Department of Employment. Employment Security Department.
Manpower development and training act programs. Economic forecasts and labor market studies. Occupational placement services trends and projections.

(3) State Department of Commerce. Economic Development Division.
Status, trends, and projections on industrial development. Manpower needs by occupations and levels.

(4) State Department of Labor.
Laws affecting workers; legislation applied to young workers. Safety provision and measures in vocational schools and industrial establishments.

(5) State Universities — College of Economics, Education and Sociology.
State, regional, and local studies on economic, social, and educational characteristics. Consultative services.

(6) Cooperative Area Manpower Planning System (C.A.M.P.S.) State Coordinating Committee
Inter-agency cooperation and coordination of federally financed manpower programs. Training priorities and evaluation of training resources.

(7) State Research Corporations.
State and local research findings on industrial development, manpower needs, and labor force characteristics.

(8) State Research Coordinating Units.
Program evaluation; curriculum experimentation and development; personnel development; program planning and management; instructional innovations; employment opportunities and manpower needs; emerging occupations; and training needs.

(9) State Technical Institute and Regional Vocational Schools.
Student population in vocational education by age, sex, and service areas. Enrollment and graduation ratios. Training programs and levels within service areas. Physical facilities, equipment, and personnel.

Non-Public Agencies

(1) Chamber of Commerce.
Employers' interest in vocational and technical education. Employers'
requirements for employment; skills, knowledge, and attitudes which new employees should possess to meet the current and future needs of industry.

(2) Organized Labor — Labor Unions.
Local demand and supply of labor force. Union requirements and qualifications. State and local apprenticeship programs and apprentices in each trade. State and local salary schedules.

(3) Private Training Institutions.
Student population training programs. Enrollment and graduation ratios. Tuition and fees.

Legal Documents
5. State Legislature. State legislation related to the administration of vocational and technical education programs.
6. State Board of Education. State policy related to the administration of vocational and technical education.

General Systems Planning References


