

Maryland Affiliate  
for the  
Business,  
Management, and  
Finance (BMF)  
Programs

Developed by the  
Maryland State Department  
of Education (MSDE)

Request for Proposals

Division of Career and  
College Readiness

Maryland State Department  
of Education

200 West Baltimore St.  
Baltimore, Maryland 21201

Dissemination Date:  
September 30, 2016

Deadline:  
November 15, 2016

| <b>PROPOSAL DESCRIPTION</b>   |  |
|-------------------------------|--|
| <b>Name of Grant Program:</b> | Maryland Affiliate for the Career and Technology Education (CTE) Business, Management, and Finance (BMF) Programs of Study developed by the Maryland State Department of Education (MSDE)  |
| <b>Authorization:</b>         | The Carl D. Perkins Career and Technical Education Improvement Act of 2006, Public Law 109-270   |
| <b>Dissemination:</b>         | September 30, 2016   |
| <b>Deadline:</b>              | All required grant submissions must be emailed or postmarked by October 31, 2016. See: Application Submission, page 5, for details.  |
| <b>Purpose:</b>               | <p>The purpose for this grant is to identify a two- or four-year Maryland public or independent college or university to act as an “Affiliate” that will enter into an agreement with the Maryland State Department of Education (MSDE) to support the <b>Business, Management, and Finance (BMF)</b> state programs of study. The Affiliate must offer an associate, baccalaureate, or accelerated degree and demonstrate a successful record of Business, Management, and Finance education. The Affiliate, in collaboration with MSDE, will provide and/or coordinate the following activities over a three-year grant period based upon successful performance of the first year and availability of funds.</p> <ul style="list-style-type: none"> <li>A. Convene the BMF State Advisory Committee (SAC), guide the development and adaptation of relevant and rigorous guidelines, lesson plans, resources, related materials, and projects for each of the BMF Career Pathways (Business Management, Accounting and Finance, Marketing, and Academy of Finance);</li> <li>B. Provide professional development opportunities for BMF teachers;</li> <li>C. Explore options for awarding credit (articulated or transcribed credit for high school students in BMF programs and graduate credit or continuing professional development for teachers);</li> <li>D. Identify members to serve on the SAC and attend MSDE convened meetings; and</li> <li>E. Develop online resources and documents that could be shared on MSDE’s BlackBoard platform to support a Professional Learning Community (PLC) for teachers and statewide communication.</li> </ul> <p><b>Note: All curriculum content developed is to be marked © copyright MSDE.</b></p> |
| <b>Required Components:</b>   | To be approved, each application must address all components of the competitive criteria specified in the RFP and scoring rubric and include all attachments/forms as designated. Due to the competitive nature of this grant, applications must meet criteria upon initial submission.  |
| <b>Priorities:</b>            | Priority will be given to applicants that demonstrate readiness to meet the requirements set forth in this RFP and best explain how the affiliate will be sustained after three years of grant funding.  |
| <b>Eligible Applicants:</b>   | Maryland public or independent colleges and universities that offer associate, baccalaureate and accelerated degrees or certifications and demonstrate a proven record of successful Business, Management, and Finance programs.   |
| <b>Proposal Review:</b>       | The review of proposals will be conducted as follows:  |

|                                    |  |
|------------------------------------|--|
|                                    | <ol style="list-style-type: none"> <li>1. Grant applications will undergo a technical review upon submission to ensure completeness.</li> <li>2. A review committee established by MSDE will evaluate applications using the scoring rubric. Final approval for an award will be determined by MSDE.</li> </ol>  |
| <b>Award Notifications:</b>        | The successful applicant will be notified of the grant award on or before November 30, 2016. Spending authority is effective on the first day of the month that all required elements are received in approvable form, but not before December 1, 2016. A Notification of approval will be sent by mail.   |
| <b>Total Funds Available:</b>      | Up to \$75,000 over three years. During the first fiscal year (December 1, 2016 to June 30, 2017), the applicant may apply for up to \$25,000. <b>Note: <i>The balance of the funds may be applied to the subsequent years of the grant pending the availability of federal funds, submission of approvable work for the prior grant year and demonstrated institutional capacity to sustain the Affiliate.</i></b>  |
| <b>Grant Period:</b>               | Yearly grants, beginning December 1, 2016 to June 30, 2017, and the following state fiscal years of July 1, 2017 to June 30, 2018 and July 1, 2018 to June 30, 2019 ( <b>see Note above</b> ). The Affiliate is expected to be self-sustaining after the three-year grant period.  |
| <b>Number and Award of Grants:</b> | One grant will be awarded based on meeting the competitive criteria with continuation for subsequent years based on successful performance and the availability of federal funds.  |
| <b>Fund Use:</b>                   | <p>Costs incurred outside the grant period may not be funded through the grant award. In addition to the activities required to operate an Affiliate, Maryland has established the following requirements.</p> <p><b>Funds may be used for:</b></p> <ul style="list-style-type: none"> <li>• Personnel expenses, including salaries and fringe benefits; or faculty stipends for instructors for the Summer Professional Development (PD) for Business, Management, and Finance. (Stipends are only allowable for work performed outside the regular work day) or contract;</li> <li>• Stipends or salaries for support staff to manage registration for the BMF professional development sessions for instructors during the school year and summer session(s) outside the regular work day or contract;</li> <li>• Consultant services (Consulting fees are limited to \$500 per day, plus travel expenses.)</li> <li>• Consultant travel expenses cannot exceed state per diem rates which are: <ul style="list-style-type: none"> <li>○ Mileage: \$0.54/mile</li> <li>○ Breakfast: \$9</li> <li>○ Lunch: \$11</li> <li>○ Dinner: \$25</li> </ul> </li> <li>• Per diem rates also apply to anyone participating in professional development activities who claim expenses from this grant;</li> <li>• Instructional materials and supplies to support curriculum development, implementation and professional development; and</li> <li>• Administrative costs not to exceed 5% of the total grant, including indirect costs.</li> </ul> <p><b>Funds may <u>not</u> be used for:</b></p> <ul style="list-style-type: none"> <li>• Program maintenance at current performance levels;</li> <li>• Purchase of equipment for administrative purposes;</li> <li>• Furniture for classrooms or laboratories, Internet wiring or capital</li> </ul> |

|   |  |
|---|--|
|   | <p>improvements;</p> <ul style="list-style-type: none"> <li>• Purchase of career information delivery system site licenses;</li> <li>• Travel, except as specified by the grant;</li> <li>• Purchase of distance learning equipment or infrastructure;</li> <li>• Tuition for teachers or students;</li> <li>• Promotional items (e.g. shirts, key chains, bags, mugs); and</li> <li>• Purchase of equipment or computers for any purpose except as specified by the grant.</li> </ul>   |
| <b>The General Education Provisions Act (GEPA), Section 427</b> | Each applicant must develop and describe the steps such applicant proposes to take to ensure equitable access to, and equitable participation in, the project or activity to be conducted with such assistance, by addressing the special needs of students, teachers, and other program beneficiaries in order to overcome barriers to equitable participation.   |
| <b>Certification Statements</b>                                 | <p>Complete the required certification forms and provide the appropriate signatures on each form. <b>Signatures must be in blue ink:</b></p> <ul style="list-style-type: none"> <li>• Certifications Regarding Lobbying; Debarment, Suspension And Other Responsibility Matters; And Drug-Free Workplace Requirements (Appendix E).</li> <li>• Certification Regarding Debarment, Suspension, Ineligibility And Voluntary Exclusion—Lower Tier Covered Transactions (Appendix F).</li> <li>• If selected grantee is a for profit entity, an audited Annual Financial Statement will be required to be submitted. Potential grantee will be notified if this applies.</li> </ul>  |
| <b>Reporting Requirements</b>                                   | <p><b>Grantees must submit:</b></p> <ul style="list-style-type: none"> <li>• Mid-year narrative and financial reports;</li> <li>• Annual narrative and financial reports; and</li> <li>• Final evaluation report, including data, within 60 days of the grant end date.</li> </ul>   |
| <b>Application Assembly</b>                                     | <p>Bound copies must be stapled in the upper left corner. Copies should not be bound by glue, spirals, wire clasps, or any other means.</p> <p>Proposals submitted must contain the following information and <b>be assembled in the order indicated:</b></p> <ul style="list-style-type: none"> <li>• Proposal Cover Page (Appendix A);</li> <li>• Signed Assurances Page (Appendix B);</li> <li>• Grant Application (narrative following the grant outline)</li> <li>• Signed MSDE Postsecondary Budget Forms (Appendix C –an Excel Spreadsheet) from December 1, 2016 to June 30, 2017);</li> <li>• FY 2017 Career and Technology Grant Information Survey (Appendix D);</li> <li>• Certification Forms (Appendices E and F); and</li> <li>• Include two (2) letters of support (one demonstrating institutional commitment from senior level administrators within the institution to implement and sustain the affiliate program after federal funding ends, and one letter from either a colleague from within the institution or a former student who graduated from the institution). Letters are not counted as part of the 10 page limit of the application</li> </ul> |
| <b>Submission Requirements</b>                                  | <ul style="list-style-type: none"> <li>• Narrative cannot exceed <b>ten pages</b>, excluding the forms required for submission. The narrative must use line spacing of at least 1.5, and a type size of 12-point font. Charts may use single spacing and a type size of 10-point font. Required forms and letters of support do not count toward the</li> </ul>  |

|                             |   |
|-----------------------------|---|
|                             | <p>10 page limit;</p> <ul style="list-style-type: none"> <li>• All copies of the proposal should be on standard (8½ x 11) size paper of regular weight and numbered according to the prescribed numbering convention;</li> <li>• The original coversheet, assurances page, and budget sheets must be signed in <u>BLUE</u> ink;</li> <li>• Applications may be scanned and submitted electronically to Jeanne-Marie Holly as long as all signatures are in BLUE ink. If sent electronically with BLUE ink, do not send hard copies;</li> <li>• If the ability to scan color documents is not available, the proposal may still be submitted electronically to <a href="mailto:jeanne-marie.holly@maryland.gov">jeanne-marie.holly@maryland.gov</a>, but <b>one</b> hard copy of the <b>signature pages only</b>, signed in BLUE ink, must be mailed to the address below; and</li> <li>• Both the electronic copy and the hard copies must be submitted/postmarked <b>by November 15, 2016</b>.</li> </ul> <p style="text-align: center;"><b>Submit applications to:</b><br/> Maryland State Department of Education<br/> 200 West Baltimore Street, Third Floor<br/> Baltimore, Maryland 21201<br/> Attention: Jeanne-Marie Holly, Program Manager<br/> Career and Technology Education Systems Branch<br/> <a href="mailto:jeanne-marie.holly@maryland.gov">jeanne-marie.holly@maryland.gov</a></p> |
| <b>Technical Assistance</b> | <p>Technical assistance and additional copies of all required reporting forms and amendment request forms may be requested from:</p> <p>Diana Hegmann, BMF Education Specialist<br/> Division of Career and College Readiness<br/> 410-767-0536<br/> <a href="mailto:diana.hegmann@maryland.gov">diana.hegmann@maryland.gov</a></p> <p>Pat Mikos, Program Manager<br/> CTE Student and Assessment Services Branch<br/> Division of Career and College Readiness<br/> 410-767-0186<br/> <a href="mailto:patricia.mikos@maryland.gov">patricia.mikos@maryland.gov</a></p>   |

**Non-discrimination Statement:**

The Maryland State Department of Education does not discriminate on the basis of age, ancestry/national origin, color, disability, gender identity/expression, marital status, race, religion, sex, or sexual orientation in matters affecting employment or in providing access to programs and activities and provides equal access to the Boy Scouts and other designated youth groups. For inquiries related to Department policy, please contact:

Equity Assurance and Compliance Office  
Office of the Deputy State Superintendent for Finance and Administration  
Maryland State Department of Education  
200 W. Baltimore Street - 6th Floor  
Baltimore, Maryland 21201-2595  
410-767-0426 - voice  
410-767-0431 - fax  
410-333-6442 - TTY/TDD

# Readiness Criteria Form

Please complete this form and return it with the grant application. It will be used to help determine readiness to establish an affiliate for the Business, Management, and Finance (BMF) Programs of Study.

NOTE: The grantee must provide classroom laboratory space, including furniture and Internet access.

1. Does the grantee have a computer lab and Internet access for up to 25 teachers?  Yes  No
  
2. Can the grantee provide a computer lab for up to 25 equipped with the Microsoft Office Suite and Certiport testing capabilities?  Yes  No
  
3. Does the grantee have a testing/assessment center or lab that can support CLEP testing?  Yes  No
  
4. Does the grantee have administrative support for hosting professional development events, including registration and fee collection?  Yes  No
  
5. Does the grantee have IT/technical support for the use of a learning management system (LMS), such as BlackBoard?  Yes  No

Please provide the name and title of the person completing this form.

Name: \_\_\_\_\_ Title: \_\_\_\_\_

Institution: \_\_\_\_\_

**MARYLAND AFFILIATE**  
**for the**  
**BUSINESS, MANAGEMENT, AND FINANCE (BMF) PROGRAMS OF STUDY (POS)**

Applicant may apply for up to \$25,000 for Year 1 between December 1, 2016 - June 30, 2017. *The balance of the funds may be applied to the subsequent two years of the grant pending the availability of federal funds, submission of approvable work for the prior grant year and demonstrated institutional capacity to sustain the Affiliate.*

**I. BACKGROUND: BUSINESS, MANAGEMENT, AND FINANCE PROGRAMS OF STUDY**

The BMF programs of study provide students with an opportunity to participate in a high quality, rigorous instruction to learn broad knowledge skills and technical skills related to one of the four specific programs of study. Business remains the number one college major in the nation overall for both men and women. Maryland needs to prepare more students to become business and finance professionals in order to provide a qualified workforce in support of the state's economic development priorities and workforce needs. The overarching goals of BMF are to help students:

- Develop skills for success and other workforce requirements such as workplace readiness, computer applications, written and oral communication skills, financial accounting skills, and leadership skills;
- Develop an awareness of and respect for the diversity of the world of work;
- Understand the relationship between school performance and future employment opportunities;
- Access work study, internship, mentorship, and job shadow opportunities;
- Access student organizations such as DECA and FBLA;
- Obtain industry certifications where appropriate; and
- Earn college credits through articulation agreements and dual enrollment.

The BMF programs of study prepare students for academic studies in undergraduate business programs. The Maryland BMF cluster focuses on five programs of study based on the Maryland State Department of Education framework for Business, Management, and Finance. The programs of study are: Business Management, Marketing, Accounting and Finance, Business Administrative Services, and support for the Academy of Finance program sponsored through the National Academy Foundation (NAF). Each course within a program of study should be developed with regional postsecondary education and business partners including the BMF State Advisory Council (SAC). It is recommended that students in all programs of study take the same two core courses – *Principles of Business Management and Entrepreneurship (NEW title!)* and *Principles of Accounting & Finance*. Upon completion of the two courses, students are required to complete the remaining credits in their selected program of study as listed below.

1. Business Management Pathway
  - a. *Advanced Business Management*
  - b. *Business Management and Entrepreneurship Capstone (NEW title!)*
2. Accounting and Finance
  - a. *Advanced Accounting*
  - b. *Accounting & Finance and Entrepreneurship Capstone (NEW title!)*
3. Marketing
  - a. *Introduction to Marketing*
  - b. *Advanced Marketing and Entrepreneurship Capstone (NEW title!)*
4. Business Administrative Services
  - a. *Office Systems Management I*
  - b. *Office Systems Management II*
5. Academy of Finance (course development supported by NAF)

Local School Systems (LSSs) are responsible for developing a work plan from the developed recommended curricula for each program of study. Teachers are to use the resources developed to give students the appropriate academic, technical and employability skills that would prepare those students for career and college readiness. Students develop skills and knowledge throughout the programs of study to successfully participate in the CLEP exam, and/or Microsoft Office Specialist (MOS) Certification. These opportunities give the students an experience in a “real” case study project and a chance to earn business college credits similar to the Advanced Placement exams. Students participating in the BMF *Program* also have the opportunity to further develop these skills through a supervised work internship or mentorship; and, student organizations such as DECA and FBLA.

## II. MARYLAND BMF AFFILIATE ACTIVITIES

The Maryland State Department of Education invites Maryland’s colleges and universities with a proven record of successful Business, Management, and Finance education programs to submit proposals to become a Career and Technology Education (CTE) Program Affiliate for the BMF Program of Study.

Maryland’s BMF Affiliate will serve schools, teachers, school counselors and administrators that have joined a network of secondary schools who have adopted or who are planning to adopt the BMF CTE State Programs of Study. The Program Affiliate will assist in the development of curricula which includes but is not limited to a revision of the current guidelines and the other factors listed below as well as instruction to prepare for the appropriate CLEP examinations.

- In collaboration with MSDE, move current BMF programs of study documents to the MSDE BlackBoard platform;
- Provide a course syllabus for each course;
- Update/enhance the current BMF course guides to include objectives and indicators for each major topic to be in alignment with university standards;
- Develop appropriate lesson plans for each course;
- Identify or develop appropriate handouts, PowerPoints, and other relevant resources for each course;
- Identify or provide appropriate assessment tools or links to assessment tools that align with the CLEP exams;
- Identify appropriate online tools and video tutorials; and
- Identify or develop appropriate CTSO extensions of DECA or FBLA within the classroom.

In addition, the Affiliate will provide professional development to secondary instructors whose LSSs have adopted the BMF Programs of Study. Further, the Affiliate will explore opportunities in the state to offer college credit to those secondary students that successfully complete the BMF Program of Study and have met the agreed upon criteria. The affiliate will also provide graduate and/or continuing professional development (CPD) credit to the teachers participating in the professional development. Finally, to support statewide communication among BMF teachers, the Affiliate will develop online resources and documents that can be shared on MSDE’s platform, BlackBoard.

***Applications should follow the outline provided below. The application should address activities for how the courses of instruction will be developed, professional development will be provided, credit for students and teachers will be awarded and electronic communications will be developed and monitored during the three-year grant period. In order to receive continued funding for the subsequent year, a year-two approved plan narrative, budget and budget narrative are required. This process is required for year three if applicable. Funds for year two and year three are pending based upon successful performance of Year 1 and the availability of federal funding.***



**Respond to each (A – F): 100 points and follow the outline provided**

**A. Leadership Capacity and Sustainability**

**(20 Points)**

The applicant should describe the capacity of the institution to serve in the role of an affiliate by:

1. Documenting how the applicant successfully transitions graduating students through postsecondary education to further education and/or employment by providing current overall placement data;
2. Providing information and data of past performance that speak to its institutional capacity to complete the work described in sections B-E; and
3. Describing the demonstrated institutional capacity to sustain the Affiliate once federal funding ends after year three.
4. Complete and return the Readiness Criteria Form with the grant application.
5. Include two (2) letters of support (one demonstrating institutional commitment from senior level administrators within the institution to implement and sustain the affiliate program after federal funding ends, and one letter from either a colleague from within the institution or a former student who graduated from the institution). Letters are not counted as part of the 10 page limit of the application.

**B. Support of Goals and Activities**

**(35 Points)**

**1. Curriculum Development:**

The BMF Affiliate, in collaboration with MSDE and the BMF SAC is required to update and enhance curricula for the use of the LSS as they adopt or have adopted the BMF programs of study. The curricula, which will be created as units and lesson plans, shall provide opportunities for students to demonstrate learning guided by assessment rubrics that will contribute to the development of products or artifacts. These artifacts can become part of the students' portfolio demonstrating preparedness for college and career. ***By the end of year one, the BMF Affiliate should have completed the below items.***

- **All ten (10) courses within the BMF Programs of Study must be reviewed and evaluated to identify gaps and modifications.**
- **Curricula inclusive of course overview, course outline, lesson plans, identification of assessment tools, sample resources, and suggested materials for the first two general courses must be complete. These courses are *Principles of Business Management and Entrepreneurship* and *Principles of Accounting & Finance*.**

By the end of the three-year grant period, the remaining courses of the BMF programs of study are to be completed. The applicant should describe a plan for how the affiliate will implement and monitor the following:

- a. Develop a timeline for the scope of work in Year One.
- b. Conduct an initial review of current BMF curricula materials.
- c. Create a project plan for the development of all curricula for the BMF programs of study that could be used by the local school system and incorporate the appropriate standards:
  - i. Integrate the National Standards for Business;
  - ii. Integrate the related performance indicators for each BMF program of study;
  - iii. Integrate Maryland's College and Career Readiness Standards and Practices as related to BMF and CTE;
  - iv. Identify essential learning outcomes; and
  - v. Develop assessment rubrics that align with appropriate standards and related student work.
- d. Develop a process to field test, evaluate, and update the curricula.
- e. Provide BMF teachers with a comprehensive package of teaching resources required for each BMF program of study that includes but is not limited to:
  - i. Current guidelines on the MSDE's platform, BlackBoard;

- ii. Unit Plans;
  - iii. Lesson Plans;
  - iv. Resources and Related Materials (Electronic or Paper);
  - v. Assessment tools;
  - vi. Video tutorials;
  - vii. PowerPoint® presentations;
  - viii. Test preparation materials and notes for CLEP exams (Management, Accounting, Marketing); and
  - ix. Teacher notes.
- f. Conduct subsequent curricula reviews to ensure the content is keeping pace with career standards and industry requirements.

**Note: All curriculum content developed is to be marked © copyright MSDE.**

**2. Professional Development:**

The BMF Affiliate, in collaboration with MSDE, will provide opportunities for new and veteran teachers to increase their knowledge and skills for implementing the revised curricula of instruction and supporting resources within LSSs existing BMF curricular framework. All professional development provided should be based on the [Maryland Teacher Professional Development Standards](#). The applicant will describe a plan for professional development that includes the following:

1. Conduct a professional development Summer Training Institute for up to fifty (50) participants for the purpose of presenting the revised curricula and instructional tools to appropriately equip the teachers to deliver the curriculum as written and intended;
2. Conduct webinar training opportunities and information sharing session addressing student data, industry trends and workplace/employability information.
3. Conduct one-day curricula training and information-sharing session for up to forty (40) participants during the Fall on-campus of the Affiliate;
4. Integrate curricula and supporting resources with existing resources including related on-line materials (provided by MSDE); and
5. Evaluate all professional development offered to ensure quality and continuous program improvement.

**3. Host two BMF SAC meetings during the fiscal/calendar year.**

Work in collaboration with MSDE to identify business partners and associates to participate on the BMF SAC in order to evaluate the best standards and practices within the Business, Management, and Finance industry. In addition, MSDE will assist with the planning of the two meetings that will be hosted at the Program Affiliate campus.

**4. College and Continuing Professional Development (CPD) Credit:**

The BMF Affiliate, in collaboration with MSDE, will seek out opportunities for awarding postsecondary credit for high school students in BMF programs and giving teachers graduate and/or CPD credit for satisfactory completion of professional development. The applicant will describe how the Affiliate will:

- a. Explore opportunities in the state to provide articulated or transcribed credit through a statewide articulation agreement for high school students satisfactorily completing the BMF programs of study as detailed in the example statewide articulation agreement or the passing of the related CLEP exams; and
- b. Offer graduate credit or CPD credit, where possible, to secondary school teachers who successfully complete specific professional development.

**5. Support Statewide Communication through the development of online resources and documents.**

The applicant will describe how the Affiliate will:

- a. Develop a means of electronic communication to support a Professional Learning Community for BMF teachers to share ideas, post questions, and receive program updates; or,

- b. Incorporate any electronic communication on MSDE's platform, Blackboard.

**C. Key Personnel**

**(10 Points)**

Provide a list that identifies the following: names, titles and place of employment for each person working on the grant and include:

- a. The CTE Business Management and Finance POS Affiliate Director.
- b. A one-page curriculum vitae for each Faculty member(s), adjunct faculty, or external consultants that will review and develop curricula instruction.
- c. The role of each key person within the grant clearly identified.

**D. Evaluation**

**(20 Points)**

Describe how the affiliate will operationalize an evaluation plan to ensure that the proposed program supports overall goals of the grant:

- a. Sustaining the activities of the grant after the three-year grant period ends;
- b. Implementing professional development and monitoring an electronic Professional Learning Community (PLC) for BMF teachers and administrators;
- c. Developing high-quality curricula guidelines, lesson plans, related resources, and related assessments and rubrics;
- d. Offering CPD credit for BMF teachers and articulated/or transcribed credits or CLEP exams for students; and
- e. Upgrading by 2020, the existing BMF Programs of Study based on industry standards, postsecondary and CLEP alignment, beginning with the Business Management program of study in 2016.

**E. Budget Narrative and Budget Form**

**(15 Points)**

All applicants will submit an itemized budget and a budget narrative for the first year of the grant, December 1, 2016 to June 30, 2017 (see page 3 for fund use explanation.)

## Scoring Rubric

| Plan Criteria  | Level 3<br>Meets All Criteria   | Level 2<br>Meets Some Criteria   | Level 1<br>Meets Few or No Criteria   |
|--|---|--|---|
| <b>A. Leadership Capacity and Sustainability</b><br><br><b>20 Points</b> | The proposal clearly and fully demonstrates the institution of higher education's (IHE's) ability to successfully transition graduating students to work and/or further education, as well as establish and sustain an affiliate. Completion of the Readiness Criteria Form.          | The proposal partially describes the IHE's ability to successfully transition graduating students to work and/or further education, and establish and sustain an affiliate. Completion of the Readiness Criteria Form.                               | The proposal provides weak support for the IHE's ability to successfully transition graduating students to work and/or further education, establish and sustain an affiliate. Readiness Criteria Form is either partially completed or not completed.   |
| <b>B. Support of Goals and Targets</b><br><br><b>35 Points</b>           | The application provides clear and specific details for implementation of each of the identified roles listed in Section II of the request for grant proposals. Timelines are included and are reasonable to accomplish the deliverables.   | The application provides some specific details for implementation of each of the identified roles listed in Section II of the request for grant proposals. Timelines are included but appear to be insufficient to complete the deliverables.        | The application is unclear and lacks many specific details for implementation of each of the identified Affiliate roles listed in Section II of the request for grant proposals. Timelines are included but are not adequate due to the lack of many specific details for completion of the deliverables. |
| <b>C. Key Personnel</b><br><br><b>10 Points</b>                          | An affiliate director is clearly identified. Other key personnel are identified and the proposal includes a one-page curriculum vitae for each person. Roles and responsibilities of key people are clearly stated.   | An affiliate director is named, but not clearly identified. Other key personnel are identified and the proposal does not include a one-page curriculum vitae for each person. Roles and responsibilities of key people may or may not be identified. | An affiliate director is not named or not clearly identified. Other key personnel are not identified and the proposal does not include a one-page curriculum vitae for each person. Roles and responsibilities of key people are not identified.  |
| <b>D. Evaluation</b><br><br><b>20 Points</b>                             | The evaluation plan provides specific details that describe how the affiliate will operationalize the grant activities and evaluate its effectiveness to support the overall goals of the grant. The evaluation plan includes realistic qualitative and quantitative measures.        | The evaluation plan provided is vague and generally describes how the affiliate will operationalize the grant activities and evaluate its effectiveness to support the overall goals of the grant.   | The evaluation plan provides little or no description of how the affiliate will operationalize the grant activities and evaluate its effectiveness to support the overall goals of the grant.   |
| <b>E. Budget Narrative and Budget form</b><br><br><b>15 Points</b>       | An itemized budget and budget narrative are submitted for the proposed project. The budget is reasonable and cost effective. The itemized budget and budget narrative is aligned with grant activities and totaled correctly. MSDE budget forms are included as part of the proposal. | A budget narrative provides a general explanation of expenses. The budget and narrative are not clear. The budget and budget narrative is somewhat aligned with grant activities. MSDE budget forms are included.                                    | The budget is not itemized or the budget narrative is not included. The narrative does not provide an explanation of expenses. The budget is not reasonable or cost effective. The budget and budget narratives do not align with grant activities. MSDE budget forms are not included.                   |

## APPENDICES

- A. Proposal Cover Page
- B. Assurances Page
- C. FY 2015 Career and Technology Grant Information Survey
- D. Certifications Regarding Lobbying; Debarment, Suspension and Other Responsibility Matters; and Drug-free Workplace Requirements
- E. Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion—Lower Tier Covered Transactions
- F. Flowchart of Business, Management, and Finance Cluster Programs/Pathways
- G. Flowchart of the BMF Academy of Finance Pathway
- H. Course Guides – See current BMF resources at the UMES website, <http://www.businesseducationmsde.com/curricula.html>

The required budget form, in an Excel spreadsheet format, is provided in an attachment sent through email along with this application. Applicants must submit two budgets using this spreadsheet. The form is required by the Division of Career College Readiness as part of the RFP process and may not conform to standard MSDE budget forms.

**APPENDIX A**

**+PROPOSAL COVER PAGE**

DIVISION OF CAREER AND COLLEGE READINESS  
MARYLAND STATE DEPARTMENT OF EDUCATION  
200 West Baltimore Street  
Baltimore, Maryland 21201

This agreement is between the Division of Career and College Readiness, Maryland State Department of Education and the following eligible recipient:

Institution/Agency Name: \_\_\_\_\_

Institution/Agency Address: \_\_\_\_\_

Institution/Agency Code: \_\_\_\_\_

Program/Project Title: \_\_\_\_\_ CIP Code: \_\_\_\_\_

Starting Date: \_\_\_\_\_ Ending Date: \_\_\_\_\_

Name of Program/Project Director: \_\_\_\_\_ Phone: \_\_\_\_\_

Address: \_\_\_\_\_

Level(s) (check appropriate)  Secondary  Postsecondary  Other (specify) \_\_\_\_\_

Estimated Annual Cost of Program/Project Federal (P.L. 109-270) \$ \_\_\_\_\_

(Should agree with Proposed Budget) State/Local \$ \_\_\_\_\_

Other \$ \_\_\_\_\_

**TOTAL** \$ \_\_\_\_\_

Local Perkins Plan Application Reference (If applicable) \_\_\_\_\_

Type of Proposal/Project (check one)  New  Revised  Amendment

Signature of CTE Local Director (Secondary) \_\_\_\_\_

Signature of Career & Technology Perkins Plan Contact (Postsecondary) \_\_\_\_\_

Signature of Other Recipient (Not Secondary/Postsecondary) \_\_\_\_\_

---

**DCCR USE ONLY**

---

**FUNDING SOURCE (check)**

Title I – PERKINS IV

Part B - State Leadership Activities

Professional Development

Curriculum Development

Performance Standards

Other

OTHER

State

Other (Specify) \_\_\_\_\_

Part C - Secondary & Postsecondary CTE Programs

Secondary

Postsecondary

APPROVED FUNDS - Federal \_\_\_\_\_ Control No. \_\_\_\_\_

State \_\_\_\_\_ Source of Funds FY \_\_\_\_\_

TOTAL AMOUNT \_\_\_\_\_ Approved for FY \_\_\_\_\_

CIP/CTE Activity No. \_\_\_\_\_

---

Signature, Assistant State Superintendent, Career and College Readiness \_\_\_\_\_ Date \_\_\_\_\_

**APPENDIX B**

**RECIPIENT ASSURANCES**

By receiving funds under this grant award, I hereby agree, as grantee, to comply with the following terms and conditions:

1. Programs and projects funded in total or in part through this grant shall operate in compliance with State and federal statutes and regulations, including but not limited to the 1964 Civil Rights Act and amendments, the Code of Federal Regulations (CFR) 34, the Elementary and Secondary Education Act, Education Department General Administrative Regulations (EDGAR), the General Education Provisions Act (GEPA) and the Americans with Disabilities Act (ADA). Vendors, subgrantees, and/or consultants; including officers and employees shall comply with the Family Educational Rights and Privacy Act at all times (20 U.S.C. §1232g).
2. Grantee shall assure that its facilities are accessible to individuals with disabilities as required by the ADA and applicable regulations. The grantee shall not discriminate against individuals with disabilities in the provision of its services and programs unless to do so would be an undue burden or result in fundamental alteration in the program as those terms are used in the ADA and its implementing regulation. The State reserves the right to inspect the grantee's facilities at any time to determine if the grantee is in compliance with ADA. The grantee shall bear sole responsibility for assuring that its programs conforms for the section 501c. of the ADA (42 USC 12201) as a bona fide benefit plan. The grantee shall indemnify and hold the State harmless in any administrative proceeding or action brought pursuant to the ADA for all damages, attorneys' fees, litigation expenses and costs, if such action or proceeding arises from the acts of grantee, grantee's employees, agents or subgrantees.
3. By accepting federal funds, the recipients certify that they have complied with Federal Executive Order 12549, Debarment and Suspension set forth in 2 CFR §180, and that, a signed Certification Regarding Debarment, Suspension, Ineligibility and Voluntary Exclusion form has been filed with Maryland State Department of Education Project Monitor.
4. Grantee shall establish and maintain fiscal control, fund accounting procedures by fund, as set forth in 2 CFR §200 and in applicable statute and regulation. By accepting federal funds, the recipient agrees that the amount of the grant award is contingent upon the receipt of federal funds. Grantee shall retain all records of its financial transactions and accounts relating to this grant for a period of five years, or longer if required by federal regulation. Such records shall be made available for inspection and audit by authorized representatives of MSDE.
5. Entities expending federal funds of \$750,000 or more in a single fiscal year, must have an annual financial and compliance audit in accordance with 2 CFR Subpart F 200.500 et. seq.
6. The Maryland State Department of Education (MSDE) may, as it deems necessary, supervise, evaluate and provide guidance and direction to grantee in the conduct of activities performed under this grant. However, MSDE's failure to supervise, evaluate or provide guidance and direction shall not relieve grantee of any liability for failure to comply with the terms of the grant award.
7. Grantee shall adhere to MSDE reporting requirements, including the submission of all required reports. Failure to submit complete, accurate, and timely progress and final reports may result in the withholding of subsequent grant payments until such time as the reports are filed.
8. Grantee must receive prior written approval from the MSDE Program Monitor before implementing any programmatic changes with respect to the purposes for which the grant was awarded. Unless a division implements a stricter policy, grantee must receive prior written approval from the MSDE Program Monitor for any budgetary realignment of \$1,000 or 15% of total object, program or category of expenditure, *whichever is greater*. Grantee must support the request with the reason for the requested change. Budget realignments must be submitted at least 45 days prior to the end of the grant period.
9. Requests for grant extension, when allowed, must be submitted at least 45 days prior to the end of the grant period.
10. Grantee shall insure that programs and projects that offer web-based or technology band instructional products or programs which are funded in total or in part through this grant will operate in compliance with Section 508 of the Federal Rehabilitation Act of 1973 as amended and Section 7-910 of the Education Article, Annotated Code of Maryland.
11. Grantee shall repay any funds that have been determined through the federal or State audit process to have been misspent, misapplied, or otherwise not properly accounted for, and further agrees to pay any collection fees that may subsequently be imposed by the federal and/or State government. The repayment may be made by an offset to funds that are otherwise due the grantee.

I further certify that all of the facts, figures and representations made with respect to the grant application and grant award, including exhibits and attachments, are true and correct to the best of my knowledge, information, and belief.

\_\_\_\_\_  
Superintendent of Schools/Head of Grantee Agency

\_\_\_\_\_  
Date

Revised June 2015

Appendix C

**FY 2017 Career and Technology Grant Information Survey**

**Please complete the following contact information and return to:**

Mrs. Janet B. Saunders at: E-Mail: [janet.saunders@maryland.gov](mailto:janet.saunders@maryland.gov) or Fax: 410-333-2084

**Head of Grantee Agency**

(Superintendent of Schools, Community College President or Head of Agency)

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

Title: \_\_\_\_\_

Agency: \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip Code: \_\_\_\_\_

Telephone Number: \_\_\_\_\_ FAX Number : \_\_\_\_\_

E-Mail Address: \_\_\_\_\_

**Grantee Project Director**

(Local Director, Community College Instructional Dean or Project Director)

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

Title: \_\_\_\_\_

Agency: \_\_\_\_\_

Address: \_\_\_\_\_

City/State/Zip Code: \_\_\_\_\_

Telephone Number: \_\_\_\_\_ FAX Number : \_\_\_\_\_

E-Mail Address: \_\_\_\_\_

**Grantee Finance Officer**

(Budget/Finance Person in your Finance Office)

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

Title: \_\_\_\_\_

Agency: \_\_\_\_\_

FEIN # \*

DUNS # \*\*

Address: \_\_\_\_\_

City/State/Zip Code & 4 (Required): \_\_\_\_\_

Telephone Number: \_\_\_\_\_ FAX Number: \_\_\_\_\_

E-Mail Address: \_\_\_\_\_

\* **Federal Employer ID Number** - This 9 digit code is used by businesses in order to classify and identify them as a tax payer, for banking services and other official and legal purposes. Businesses with no employees, single member LLC's and sole proprietorship's may use the Social Security number for tax reporting. However, companies with employees must have a FEIN or Federal Employer Identification Number to use for taxes.

\*\* The **Data Universal Numbering System**, abbreviated as **DUNS** or **D-U-N-S**, is a system developed and regulated by [Dun & Bradstreet](#) (D&B) that assigns a unique numeric identifier, referred to as a DUNS number, to a single business entity.

Name of completer: \_\_\_\_\_ Contact Number: \_\_\_\_\_

**If you have any questions, please do not hesitate to contact Jeanne-Marie S. Holly, Program Manager, CTE Systems Branch at (410) 767-0182.**

Revised 10/22/15



**APPENDIX D**  
**CERTIFICATIONS REGARDING LOBBYING; DEBARMENT, SUSPENSION AND OTHER**  
**RESPONSIBILITY MATTERS; AND DRUG-FREE WORKPLACE REQUIREMENTS**

Applicants should refer to the regulations cited below to determine the certification to which they are required to attest. Applicants should also review the instructions for certification included in the regulations before completing this form. Signature of this form provides for compliance with certification requirements under 34 CFR Part 82, "New Restrictions on Lobbying," and 34 CFR Part 85, "Government-wide Debarment and Suspension (Non-procurement) and Government-wide Requirements for Drug-Free Workplace (Grants)." The certifications shall be treated as a material representation of fact upon which reliance will be placed when the Department of Education determines to award the covered transaction, grant, or cooperative agreement.

---

**1. LOBBYING**

As required by Section 1352, Title 31 of the U.S. Code, and implemented at 34 CFR Part 8s, for persons entering into a grant or cooperative agreement of \$100,000, as defined at 34 CFR Part 82, Sections 82.105 and 82.110, the applicant certifies that:

- (a) No Federal appropriated funds have been paid or will be paid, by or on behalf of the undersigned, to any person for influencing or attempting to influence an officer or employee of Congress, or an employee of a Member of Congress in connection with the making or any Federal grant, the entering into of any cooperative agreement, and the extension, continuation, renewal, amendment, or modification of any Federal grant or cooperative agreement:
- (b) If any funds other than Federal appropriated funds have been paid or will be paid to any person for influencing or attempting to influence an officer or employee of any agency, a Member of Congress, an officer or employee of Congress, or an employee of a Member of Congress in connection with this Federal grant or cooperative agreement, the undersigned shall complete and submit Standard Form – LLL, "Disclosure Form to Report Lobbying," in accordance with its instructions;
- (c) The undersigned shall require that the language of this certification be included in the award documents for all sub awards at all tiers (including subcontracts) and that all sub recipients shall certify and disclose accordingly.

---

**2. DEBARMENT, SUSPENSION, AND OTHER RESPONSIBILITY MATTERS**

As required by Executive Order 12549, Debarment and Suspension, and implemented at 34 CFR Part 85, for prospective participants in primary covered transactions, as defined at 34 CFR Part 85, Section 85.102 and 85.110-

- A. The applicant certifies that it and its principals:
  - (a) Are not presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from covered transactions by any Federal department or agency;
  - (b) Have not within a three-year period preceding this application been convicted of or had a civil judgment rendered against them for commission of fraud or a criminal offense in connection with obtaining, attempting to obtain, or performing a public (Federal, State, or local) transaction or contract under a public transaction; violation of Federal or State antitrust statutes or commission of embezzlement, theft, forgery, bribery, falsification or destruction of records, making false statement, or receiving stolen property.
  - (c) Are not presently indicted for or otherwise criminally or civilly charged by a governmental entity (Federal, State, or local) with

commission of any of the offenses enumerated in paragraph (2)(b) of this certification; and

- (d) Have not within a three-year period preceding this application had one or more public transaction (Federal, State, or local) terminated for cause or default; or
- B. Where the applicant is unable to certify any of the statements in this certification, he or she shall attach an explanation to this application.

---

**3. DRUG-FREE WORKPLACE (GRANTEES OTHER THAN INDIVIDUALS)**

As required by the Drug-Free Workplace Act of 1988, and implemented at 34 CFR Part 85, Subpart F, for grantees, as defined at 34 CFR Part 85, Sections 85.605 and 85.610 –

- A. The applicant certifies that it will or will continue to provide a drug-free workplace by:
  - (a) Publishing a statement notifying employees that the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance is prohibited in the grantee's workplace and specifying the actions that will be taken against employees for violation of such prohibition:
  - (b) Establishing an on-going drug-free awareness program to inform employees about:
    - (1) The dangers of drug abuse in the workplace;
    - (2) The grantee's policy of maintaining a drug-free workplace;
    - (3) Any available drug counseling, rehabilitation, and employee assistance programs; and
    - (4) The penalties that may be imposed upon employees for drug abuse violations occurring in the workplace;
  - (c) Making it a requirement that each employee to be engaged in the performance of the grant be given a copy of the statement required by paragraph (a);
  - (d) Notifying the employee in the statement required by paragraph (a) that, as a condition of employment under the grant, the employee will:
    - (1) Abide by the terms of the statement; and
    - (2) Notify the employer in writing of his or her conviction for a violation of a criminal drug statute occurring in the workplace no later than five calendar days after such conviction;

(c) Notifying the agency, in writing, within 10 calendar days after receiving notice under subparagraph (d)(2) from an employee or otherwise receiving actual notice of such conviction. Employers of convicted employees must provide notice, including position title, to: Director, Grants and Policy and Oversight Staff, U.S. Department of Education, 400 Maryland Avenue, S.W. (Room 3652, GSA Regional Office Building No. 3), Washington, DC 20202-4248. Notice shall include the identification number(s) of each affected grant;

(d) Taking one of the following actions, within 30 calendar days or receiving notice under subparagraph (d)(2), with respect to any employee who is so convicted;

- (1) Taking appropriate personnel action against such an employee, up to and including termination, consistent with the requirements of the Rehabilitation Act of 1973, as amended; or
- (2) Requiring such employee to participate satisfactorily in a drug abuse assistance or rehabilitation program approved for such purposes by a Federal, State, or local health, law enforcement, or other appropriate agency;

(e) Making a good faith effort to continue to maintain a drug-free workplace through implementation of paragraph (a), (b), (c), (d), (e), and (f).

A. The grantee may insert in the space provided below the site(s) for the performance of work done in connection with the specific grant:

Place of Performance (Street address, city, county, state, zip code)

As the duly authorized representative of the applicant, I hereby certify that the applicant will comply with the above certification.

|                          |          |
|--------------------------|----------|
| Street Address           |          |
| City                     | County   |
| State<br><b>Maryland</b> | Zip Code |

Check  if there are any workplaces on file that are not identified here.

**DRUG-FREE WORKPLACE  
(GRANTEES WHO ARE INDIVIDUALS)**

As required by the Drug-Free Workplace Act of 1988, and implemented as 34 CFR Part 85, Subpart F, for grantees, as defined at 34 DFR Part 85, Section 85.605 and 85.610 -

- A. As a condition of the grant, I certify that I will not engage in the unlawful manufacture, distribution, dispensing, possession, or use of a controlled substance in conducting any activity with the grant; and
- B. If convicted of a criminal drug offense resulting from a violation during the conduct of any grant activity, I will report the convictions, to: Director, Grants and Contracts Services, U.S. Department of Education, 400 Maryland Avenue, S.W. (Room 3124, GSA Regional Office Building No. 3), Washington, DC 20202-4571. Notice shall include the identification number(s) of each affected grant.

|  |  |
|--|--|
| <b>NAME OF APPLICANT</b>                                   | <b>PR/AWARD NUMBER AND/OR PROJECT NAME</b> |
| <b>PRINTED NAME AND TITLE OF AUTHORIZED REPRESENTATIVE</b> |  |
| <b>SIGNATURE</b>   | <b>DATE</b>                                |

ED 80-0013, 6/90 (Replaced ED 80-0008: ED Form GCS-008, (REV. 12/88); ED 80-0010, 5/90; and ED 80-0011, 5/90

**APPENDIX E**

**Certification Regarding Debarment, Suspension, Ineligibility and  
Voluntary Exclusion—Lower Tier Covered Transactions**

This certification is required by the Department of Education regulations implementing Executive Order 12549, Debarment and Suspension, 34 CFR Part 85, for all lower tier transactions meeting the threshold and tier requirements stated at Section 85.110.

**Instructions for Certification**

1. By signing and submitting this proposal, the prospective lower tier participant is providing the certification set out below.
2. The certification in this clause is a material representation of fact upon which reliance was placed when this transaction was entered into. If it is later determined that the prospective lower tier participant knowingly rendered an erroneous certification, in addition to other remedies available to the Federal Government, the department or agency with which this transaction originated may pursue available remedies, including suspension and/or debarment.
3. The prospective lower tier participant shall provide immediate written notice to the person which this proposal is submitted if at any time the prospective lower tier participant learns that its certification was erroneous when submitted or has become erroneous by reason or changed circumstances.
4. The terms “covered transaction”, “debarred”, “suspended”, “ineligible”, “lower tier covered transaction”, “participant”, “person”, “primary covered transaction”, “principal”, “proposal”, and “voluntarily excluded”, as used in this clause, have the meaning set out in the Definitions and Coverage sections of rules implementing Executive Order 12549. You may contact the person to which this proposal is submitted for assistance in obtaining a copy of those regulations.
5. The prospective lower tier participant agrees by submitting this proposal that, should the proposed covered transaction be entered into, it shall now knowingly enter into any lower tier covered transaction with a person who is debarred, suspended, declared ineligible, or voluntarily excluded from participation in this covered transaction, unless authorized by the department or agency with which this transaction originated.
6. The prospective lower tier participant further agrees by submitting this proposal that it will include the clause titled “Certification Regarding Debarment, Suspension, Ineligibility, and Voluntary exclusion-Lower Tier Covered Transactions”, without modification, in all lower tier covered transactions and in all solicitations for lower tier covered transactions.
7. A participant in a covered transaction may rely upon a certification of a prospective participant in a lower tier covered transaction that it is not debarred, suspended, ineligible, or voluntarily excluded for the covered transaction, unless it know that the certification is erroneous. A participant may decide the method and frequency by which it determines the eligibility of its principals. Each participant may but is not required to check the Non-procurement List.
8. Nothing contained in the foregoing shall be construed to require establishment of a system of records in order to render in good faith the certification required by this clause. The knowledge and information of a participant is not required to exceed that which is normally possessed by a prudent person in the ordinary course of business dealings.
9. Except for transactions authorized under paragraph 5 of these instructions, if a participant in a covered transaction knowingly enters into a lower tier covered transaction with a person who is suspended, debarred, ineligible, or voluntarily excluded from participation in this transaction, in addition to other remedies available to the Federal Government, the department or agency with which this transaction originated may pursue available remedies, including suspension and/or debarment.

**Certification**

- (1) The prospective lower tier participant certifies, by submission of this proposal, that neither it nor its principals are presently debarred, suspended, proposed for debarment, declared ineligible, or voluntarily excluded from participation in this transaction by any Federal department or agency.
- (2) Where the prospective lower tier participant is unable to certify to any of the statements in this certification, such prospective participant shall attach an explanation to this proposal.

|  |  |
|--|--|
| <b>NAME OF APPLICANT</b>                                   | <b>PR/AWARD NUMBER AND/OR PROJECT NAME</b> |
| <b>PRINTED NAME AND TITLE OF AUTHORIZED REPRESENTATIVE</b> | <b>SIGNATURE and DATE</b>                  |

ED 80-0014, 9/90 (Replaced GCS-009 (REV. 12/88), which is obsolete)

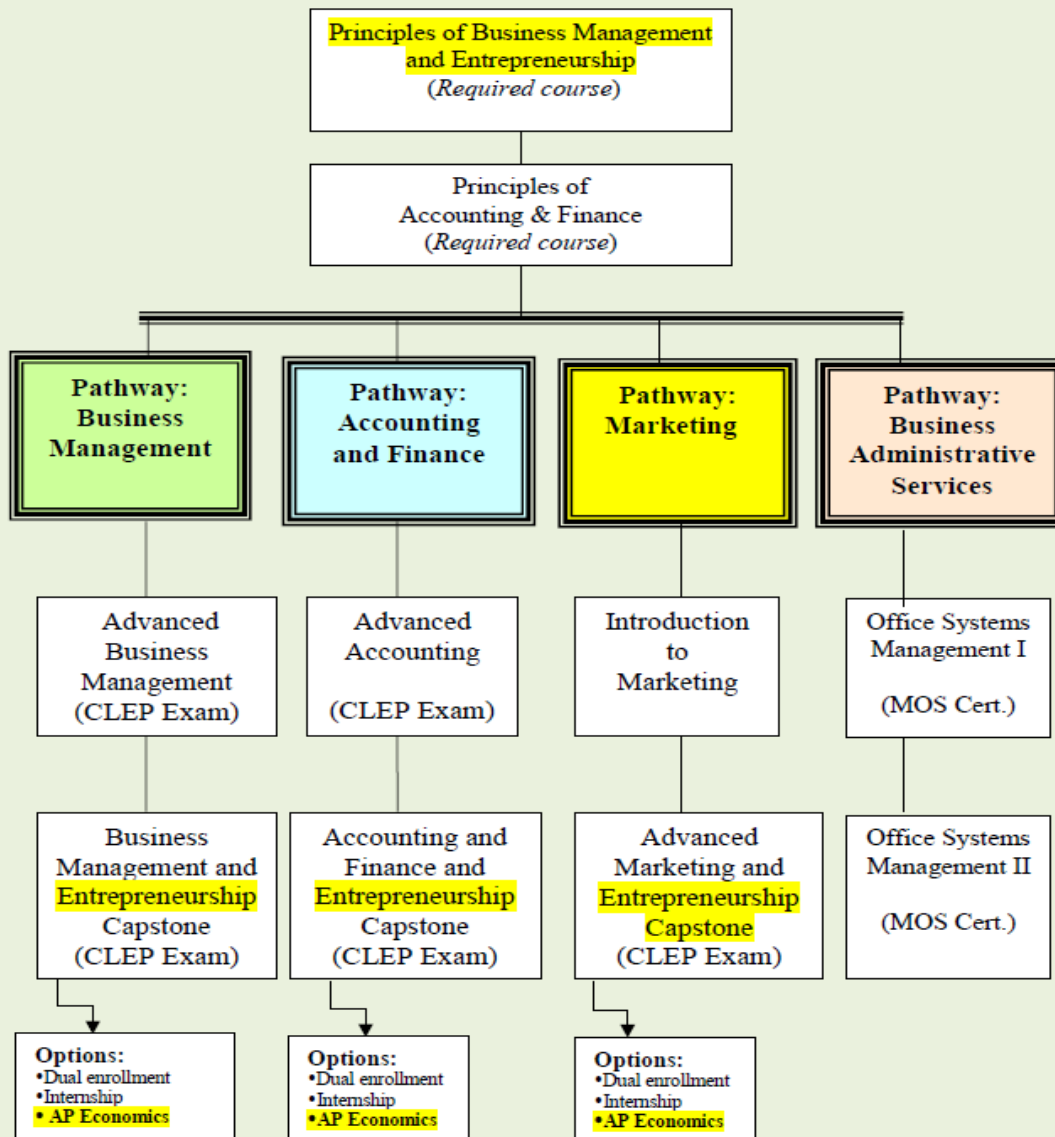
APPENDIX F

Business, Management, and Finance Cluster Programs/Pathways

## Business, Management, and Finance CTE Programs of Study

[www.mdcteprograms.org](http://www.mdcteprograms.org)

**BMF Blackboard Log-in:** <https://msde.blackboard.com>



**APPENDIX G**  
NAF – Academy of Finance

