Carl Perkins Act (CPA) IV
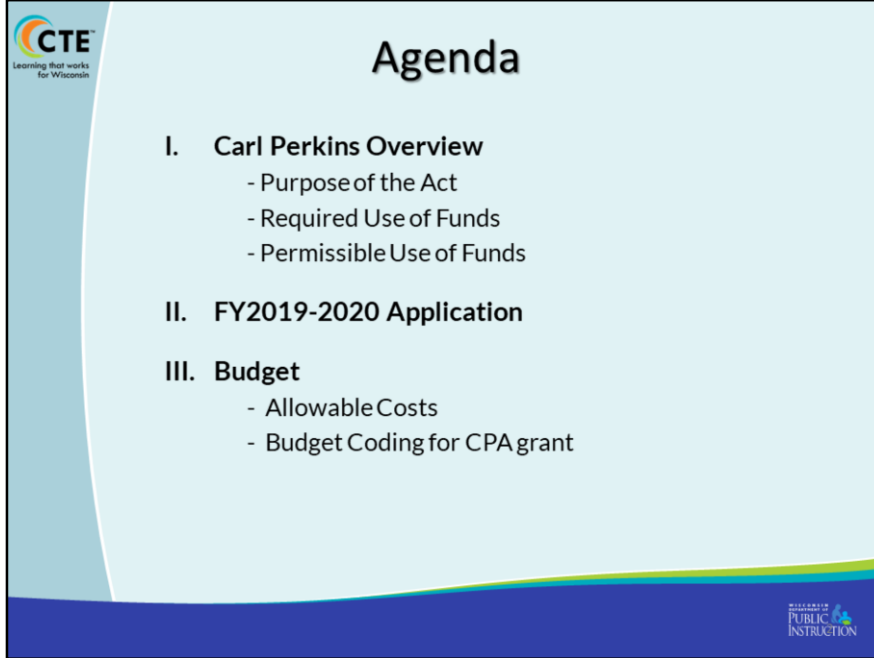2019-2020 Grant Application *and*
Budget and Spending Rules/Coding Requirements

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This PPT is intended to provide clarity around the Perkins grant requirements, application and budget process.

Agenda

I.   **Carl Perkins Overview**
   - Purpose of the Act
   - Required Use of Funds
   - Permissible Use of Funds

II. **FY2019-2020 Application**

III. **Budget**
   - Allowable Costs
   - Budget Coding for CPA grant

It will provide you an understanding of:
- the purpose of the Perkins Act
- The requirements of the act
- The permissible use of funding
- How to properly code planned purchases in the budget section

As you know, the purpose of the act was to provide for the overall improvement of CTE programs and with increased focus on the
1) academic achievement of students participating in CTE courses or programs,
2) strengthening the connections between secondary and postsecondary to ease the transition and improving accountability –
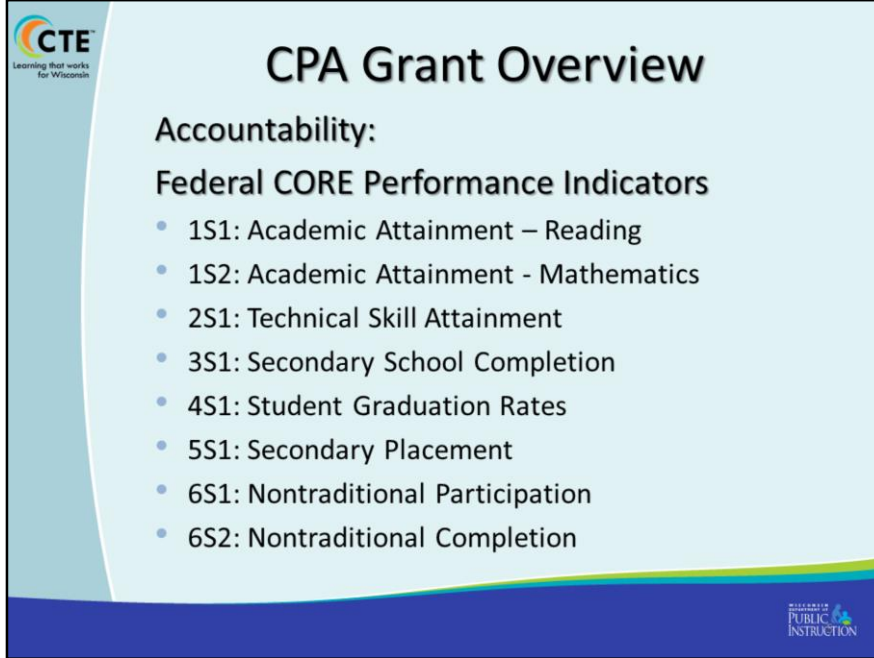3) the performance/outcomes of CTE students.

At the secondary level, the act included a provision for **funding** to assist locals in developing more fully the **academic**, **career** and **technical skills** of secondary students enrolled in technical education programs.

Meeting or exceeding Core Performance Measures on the Core Performance Indicators is a requirement of the grant.
- The state is accountable to the Dept of Education for the measures you see listed here, which means, you as a recipient of funds are responsible.
- DPI compiles the data for these measures through district reports and internal data systems for submission to the Dept of Education.
- ACT Plus test scores determine 1S1 and 1S2
- Receive technical certifications
- High school completion and graduation
- Placement after secondary education
- Participation in and completion of non-traditional occupation training.

Required Activities	Example
Activities that **strengthen the academic and CTE skills** for CTE students through academic and CTE course integration and development of coherent sequence of courses leading to certificate or degree.	Academic instruction that takes place within CTE program curriculum • Curriculum development • CTE resource teacher for language arts/reading • Math tutor for CTE
Activities linking secondary CTE with postsecondary, through implementation of POS	Produce course guides to include programs of study • Activities related to establishing or updating articulation agreements
Activities that provide students with *strong experience* in and understanding of *all* aspects of an industry, which may include work-based learning.	Curriculum materials for work based learning• Job shadow, POS work experience, apprenticeship coordination • equipment consistent with industry • Working with advisory groups on the needs, expectations and collaboration

The act requires that certain activities must be provided either through the grant funds or through local funding sources. These activities align with the purposes of the Act outlined in the earlier slides.

For example we have the Federal requirement in the left column. The right column provides examples for you to consider.

The required activities are a part of your budget planning process and are your "rationale" or "goal" for line item budgeting.

If you do not have a budget item that aligns with one of these required activities, your agency must certify that other funds are being used for the activity.

So, for example, the first required activity (top row) are those that strengthen the academic and CTE skills of students through course integration and course sequence leading to a degree. An example of an allowable expense could be salary for curriculum development over the summer or a resource teacher to help boost reading and math.
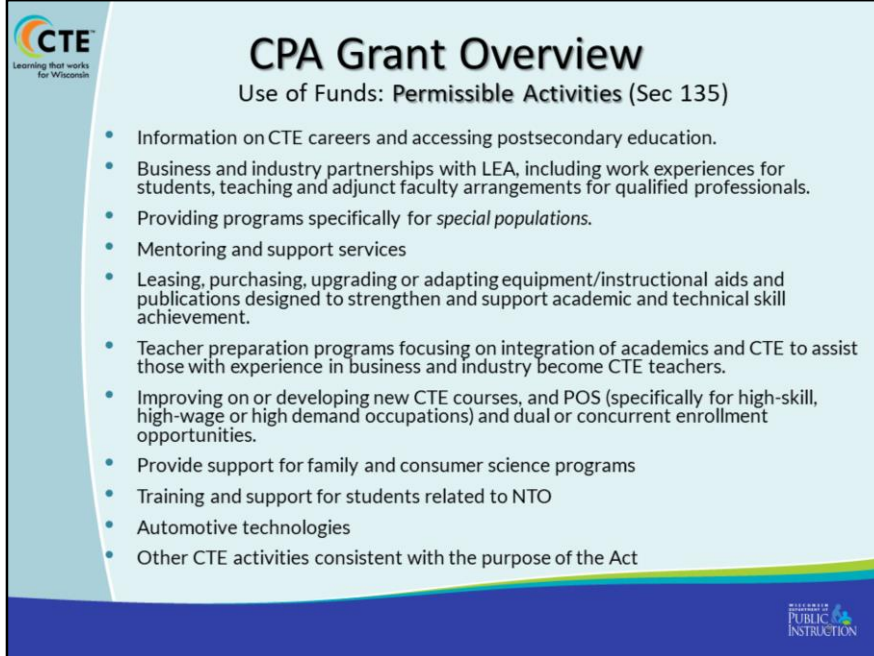
[read the rest]

Required Activities	Example
Activities that develop, improve or expand CTE *technology*, including *training* for students and teachers; teaching the skills needed to enter technology fields; and provide internships and mentoring to improve math/science knowledge.	Instructional equipment to incorporate emerging technologies into CTE programs • Tangible equipment (items with useful life of more than one year properly tagged and tracked) (Funds may not be used for technology infrastructure costs related to items such as: network devices-routers, hubs, switches, access servers.)
PD on effective course integration; parental and community involvement; use of research and data; industry standards; and effective use of technology in education.	Teacher training for integrating academics into CTE curriculum • Professional development for teachers to align standards • PD for local district CTE staff in POS areas including work sites • PD in community or Special Pops engagement • Registration and travel.

[Read]

Required	Example
Activities that initiate, improve, expand and modernize quality CTE programs and skill achievement, including relevant technology.	PD for teachers in the effective use and application of technology to improve instruction • PD registration, travel costs • Transportation for a class field trip to a technology industry • access to industry grade equipment.
Activities that develop and implement evaluations of CTE programs including assessment of how needs of special populations are being met.	• Software/assessment tools for student performance • course evaluations • follow-up surveys • CTE data support staff.
Activities to prepare *special populations*, enrolled in CTE programs for **high skills, high-wage or high demand** occupations.	Tutors, readers, adapted equipment, paraprofessionals, and other services needed by special populations.

Here we have the last three of the required activities.

CPA Grant Overview
Use of Funds: Permissible Activities (Sec 135)

- Information on CTE careers and accessing postsecondary education.
- Business and industry partnerships with LEA, including work experiences for students, teaching and adjunct faculty arrangements for qualified professionals.
- Providing programs specifically for *special populations*.
- Mentoring and support services
- Leasing, purchasing, upgrading or adapting equipment/instructional aids and publications designed to strengthen and support academic and technical skill achievement.
- Teacher preparation programs focusing on integration of academics and CTE to assist those with experience in business and industry become CTE teachers.
- Improving on or developing new CTE courses, and POS (specifically for high-skill, high-wage or high demand occupations) and dual or concurrent enrollment opportunities.
- Provide support for family and consumer science programs
- Training and support for students related to NTO
- Automotive technologies
- Other CTE activities consistent with the purpose of the Act

Likewise there are Permissive Activities/Spending > Here is a list of those things.
You may use Perkins $ for **Permissive** activities **as long as** the required activities are being addressed first.

If you select Permissible activities as the rational, for an item being purchased, you must indicate which of these you are addressing in the description field of the budget along with the description of the purchase. (repeat)

You can always use other funding sources for these activities, which you do not need to record in your budget.

SFY 2019-2020 Application

Subaward Requirements:
- Minimum allocation of $15,001.
- Consortium agreements (if applicable)
- CTE Coordinator employed by agency
- Signed Assurances

Perkins basic requirements to apply for funds.
All applicants must have a minimum formula allocation of $15,001. This is posted on the Perkins website and in WISEgrants once we have those figures (generally available the first week in March)
- Consortium agreements should be in place between the fiscal agent and member districts (held locally)
- Applicants must employ a CTE Coordinator/LVEC (state law says CTECs must hold a license as such) who provides leadership for CTE programing as well as the Carl Perkins grant for the district and serves as the DPI contact.
- Assurances: Must be signed by LEA signing authorities but should be read and fully understood by CTE Coordinators, district designees, LEA administration.
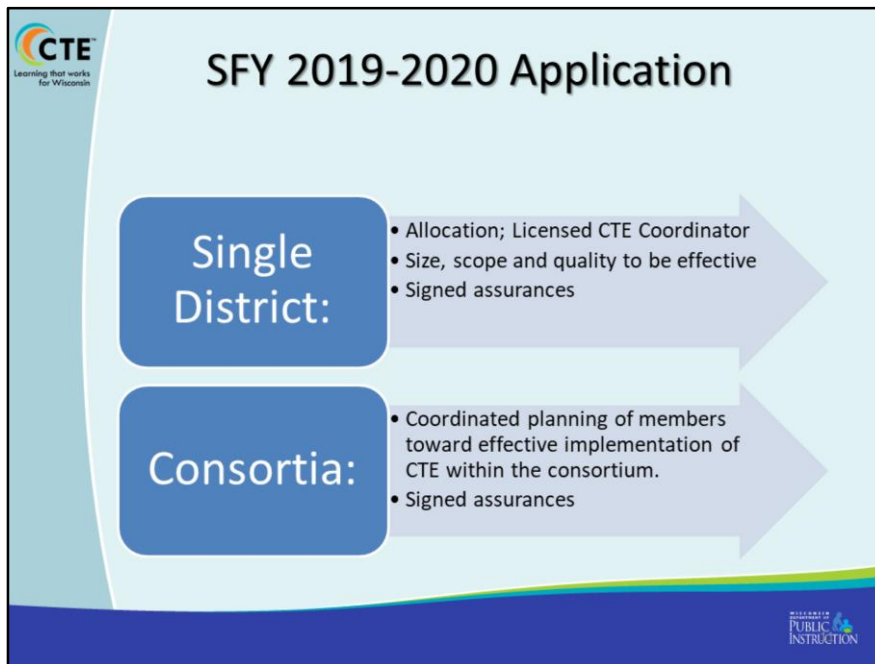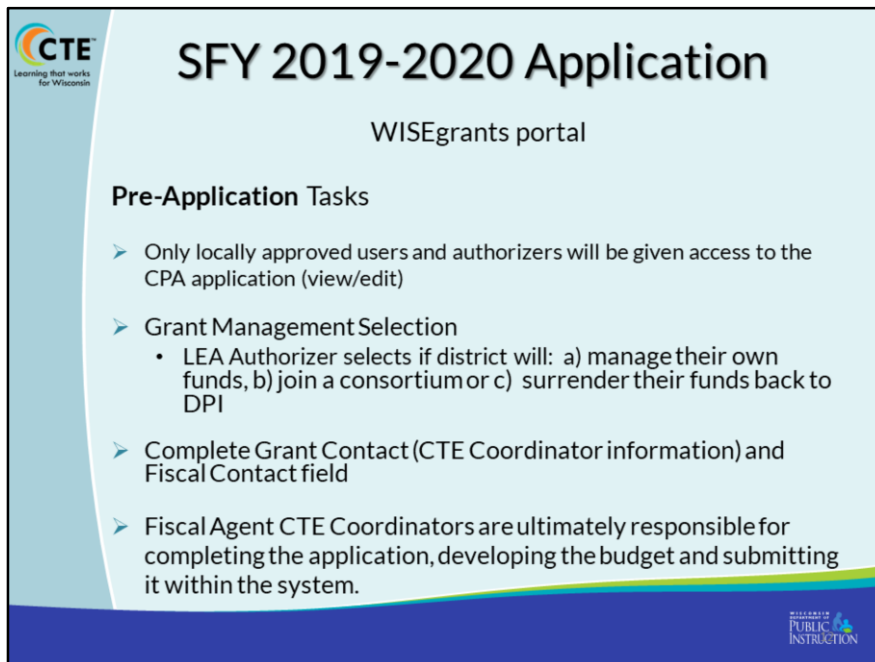
The application process begins once DPI receives the federal census data, usually late February.

- The State Fiscal Year goes from July 1 - June 30
- Application is completed in the WISEgrants Portal and will be due April 30th.

Applications are completed and submitted by either a single district or by a consortia fiscal agent.

The function of a consortia is to combine funds and have coordinated planning between the member districts that will lead to effective implementation of CTE and the Perkins Act.

Why would a district want to join a consortium? Most often we see districts participate who do not meet the $5,001 threshold. There can also be a benefit of collaborative planning and sharing of resources; or in other cases the district does not employ a licensed CTEC to lead CTE programs.

SFY 2019-2020 Application

WISEgrants portal

Pre-Application Tasks

➢ Only locally approved users and authorizers will be given access to the CPA application (view/edit)

➢ Grant Management Selection
  • LEA Authorizer selects if district will: a) manage their own funds, b) join a consortium or c) surrender their funds back to DPI

➢ Complete Grant Contact (CTE Coordinator information) and Fiscal Contact field

➢ Fiscal Agent CTE Coordinators are ultimately responsible for completing the application, developing the budget and submitting it within the system.

Pre-application Tasks
1) The application is accessed through the WISEgrants portal by personnel who have been granted access to the system by the district's security administrator located at the district.
2) Every district (Usually person authorized by the school board to make decisions on behalf of the district) must select if the district will manage their own funds, join a consortium or surrender their funds back to DPI for allocating to other districts.
   1) Joining a consortium requires entering into an agreement with the fiscal agent of the consortium. If you plan to join a consortium this should be completed prior to making the selection in WISEgrants. LEAs who choose to join a consortium as a member, the Authorizer must sign an electronic verification following the selection.
3) New field, called program coordinator contact. You should put the CTE Coordinator contact information in that field. For member districts of a consortia, this should be filled in with the District Designee who will be working with the Fiscal Agent.

4) CTE Coordinators are responsible for making sure all application tasks are completed as prescribed.

Once the preliminary work is done, there are three main sections to the application which you will access by clicking on "**Change Act Here"** on the top bar and then click on one of the three sections indicated above to work on.

The first application requirement is an annual one. The data from your Non-compliance spreadsheet currently located on the Perkins application webpage, will prefill into this section. For consortia, as members join, fiscal agents will see the data for member districts pre-fill into this section after the fund management task is completed.

Rather than the spreadsheet workbook used in the past, you will now have narrative fields to complete related to the indicator that was not met and the strategy that you plan to implement to meet compliance levels. Please note that "having a meeting to discuss the data" is not an acceptable strategy. You must indicate an actual intervention based on your root cause analysis, that was decided upon when you met to discuss your data (which if it hasn't happened already should be happening now).

Last year's narrative section you completed can be applied to this year's application. Your requirement here is to indicate if you have changes to your program that require a change to the Narrative responses from last year, by indicating a yes or a no. For example, if you are a consortium who will have a new member this year, you will need to include them in your narrative this year. If you are a single district who highlighted a POS that is no longer offered, you will need to edit your narrative. If you indicate yes, the section will "un-lock" for you to make edits to last year's plan. You will not have to re-write the entire section, just edit.

Onto the Budget!

Spending may only target **Programs of Study** that are aligned with **LMI, the workforce community** and **local economic development needs**
- An advisory board/team with varying stakeholders must have input into the POS and priorities for budget.

SFY 2019-2020 Application

Budget

To be approved, budgeted activities must meet the following:

- Expense must be reasonable and necessary and be integral (or fundamental to) the development, implementation or refinement of a POS as outlined in Guide for Developing Programs of Study **or**
- to meet Core Performance Indicator improvement plans; **and**
- Is a CTE course taught by a CTE licensed instructor;
- Includes a description of the expense, the rationale and the POS
- The expense is targeted to activities for students in 7th grade or above; _and_
- The funds supplement and do not supplant non-federal funds targeted for such activities within the district.

- To be approved any line item must be reasonable and necessary and be fundamental to the development, implementation or refinement of a POS. **Or** It must be for the purpose of the Non-compliance with Core Performance Indicator activity requirement.

Additionally the expense must also be connected to
- A course taught by a CTE licensed teacher
- Include a clear detailed description of the expense in the budget.
- targeted to 7th grade or above and
- Doesn't supplant district or other funds previously used for the expense.

Budget sections include the following:

Personnel such as Salaries and benefits

Services being purchased such as PD, student travel, employee travel, contracted services

Non-Capital Obj = purchases under $5,000

Capital Obj = purchases $5,000 or over

Other = Membership fees

Indirect = General Administration costs not assigned to one person or activity. We will talk about Direct Administration costs later. Indirect costs will be recorded in the drop down heading and is associated with the overall operation costs such as fiscal operations of business office personnel and are not identified in the drop down menu.

SFY2019-20 Budget

Consortia Fiscal Agents

Consortia
- *A consortium works for the benefit of all participating school districts.*
- Consortia Fiscal Agents may not disburse grant funds to a member district prior to receiving supporting documentation for purchases.
- Perkins is not considered *pass-through* funding.

Example:
Consortium receives $21,000
- 4 LEAs participate
- Consortium maintains $1,000 for administration
- Each member district *could* receive $5,000 to develop, implement or refine a POS as identified by the consortium members.
- There must be a plan for use of funds built into the consortium budget and receipts submitted for use of funds.

In the case, of a consortium, funds are pooled for the benefit of all members in order to leverage programs and activities so that they are of sufficient size and scope to be effective.

Members determine a plan for prioritizing costs annually.
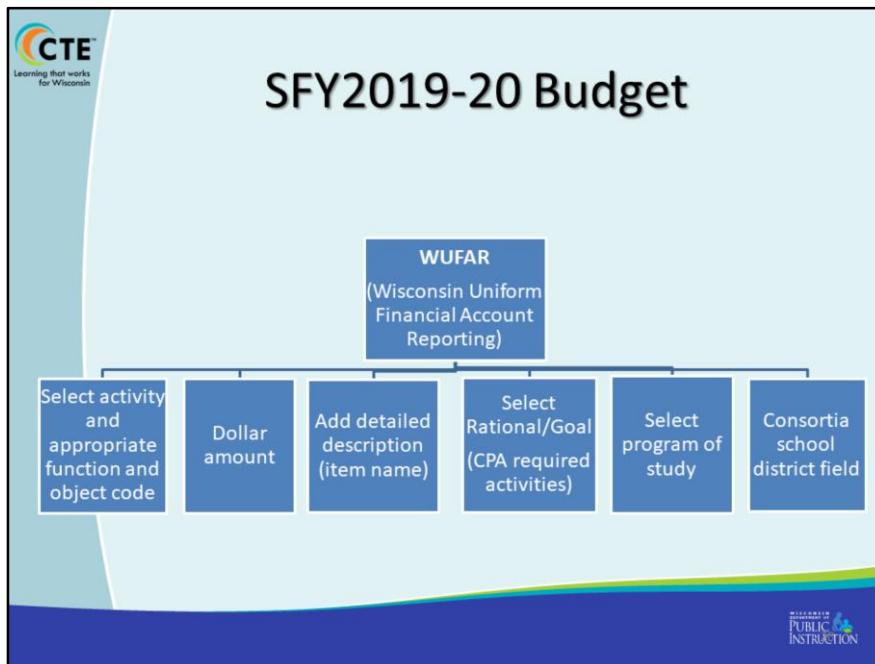
Budget
The budget section in WISEgrants has drop down functionality that meets state and federal accounting requirements referred to as Wisconsin Uniform Financial Account Reporting (WUFAR).

The WUFAR Guide found on the DPI website directs how purchases must be coded.
For every purchase:
- You will select an activity (or purchase) related to a function code
- You will fill in the dollar amount
- You will Select a POS for that activity
- Detailed description of the item being purchased
- You will Select the rationale/goal for that activity – rationale options consist of the 9 required activities. If the purchase is not related to a required activity. If you indicate a permissible activity, you will be asked to certify that the required activity is being paid for with local funds.
- School district (consortia only)
- Ledger and Vendor fields (not shown here) is for local use only and is not seen by reviewers.
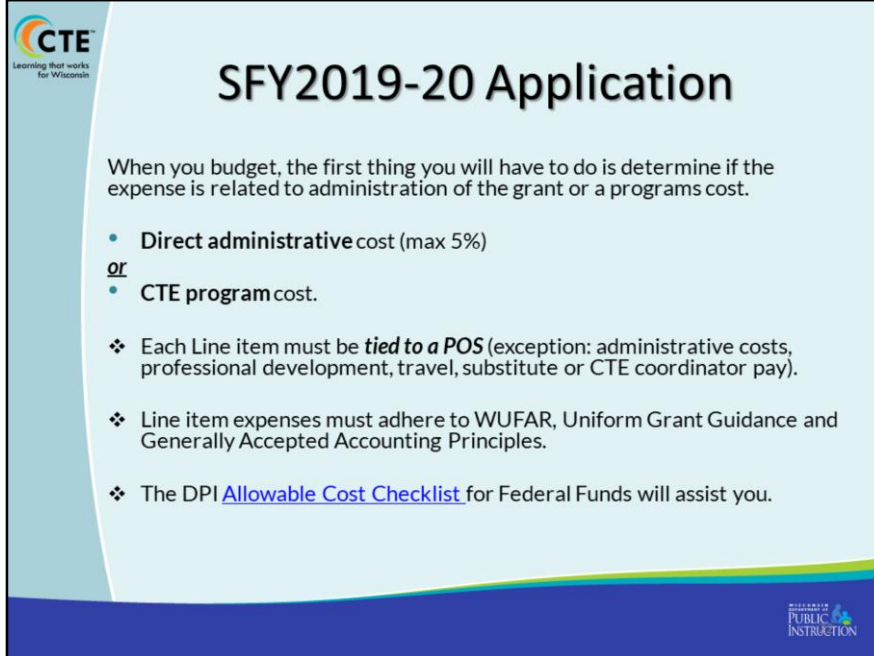
The function categories for purchases are the same as they have been and include:
Supervision and Coordination 223000 series
Instruction costs which are 130 and 431000 series
And Support Services which are 200000 series

SFY2019-20 Application

When you budget, the first thing you will have to do is determine if the expense is related to administration of the grant or a programs cost.

- **Direct administrative** cost (max 5%)

or

- **CTE program** cost.

❖ Each Line item must be *tied to a POS* (exception: administrative costs, professional development, travel, substitute or CTE coordinator pay).

❖ Line item expenses must adhere to WUFAR, Uniform Grant Guidance and Generally Accepted Accounting Principles.

❖ The DPI Allowable Cost Checklist for Federal Funds will assist you.

Every budgeted item fits into 1 of 2 main categories – Direct Administrative cost or CTE program cost.

Administrative functions are anything related to administering the grant, such as a percent of salary for the CTE Coordinator (unless already paid with other funding source), costs related to required paperwork, documentation, data collection. If you choose to put a percentage of those funds toward indirect administration, that is fine but will be recorded in another way.
Program costs are those that deal with development of programs of study, instruction, curriculum development (those required or permissible activities we saw earlier);

SFY2019-20 Budget

Allowable Costs

Personnel
- *CTE licensed* teachers for work on new POS curriculum development, alignment or refinement
- PD during the summer or non-work hours as identified in the Carl Perkins Application
- CTE coordinator administrative tasks and POS development, implementation, and coordination

What should <u>not</u> be coded here:
- Non-licensed CTE teachers
- Individuals who are not employees of district or fiscal agent

*WUFAR Guide, pg. 11-1 through 11-2 describes codes for **salary and fringe**.*

Personnel costs are limited to CTE licensed teachers for work outside of the school day to further POS curriculum, professional development, or for CTE coordinator activities.

You wouldn't budget for non-CTE teacher salaries or stipends, nor for people who are not employees.

SFY2019-20 Budget
Allowable Costs

Purchase Services
- Services rendered or performed by personnel who are not on the payroll of the fiscal agent.
- Employee travel expenses (transportation, meals and lodging).
- PD Registration
- Student transportation

What should not be coded here?
- Fiscal Agents should not code purchases made for member districts as a Purchased Service
- Nor can a fiscal agent purchase a service from themselves
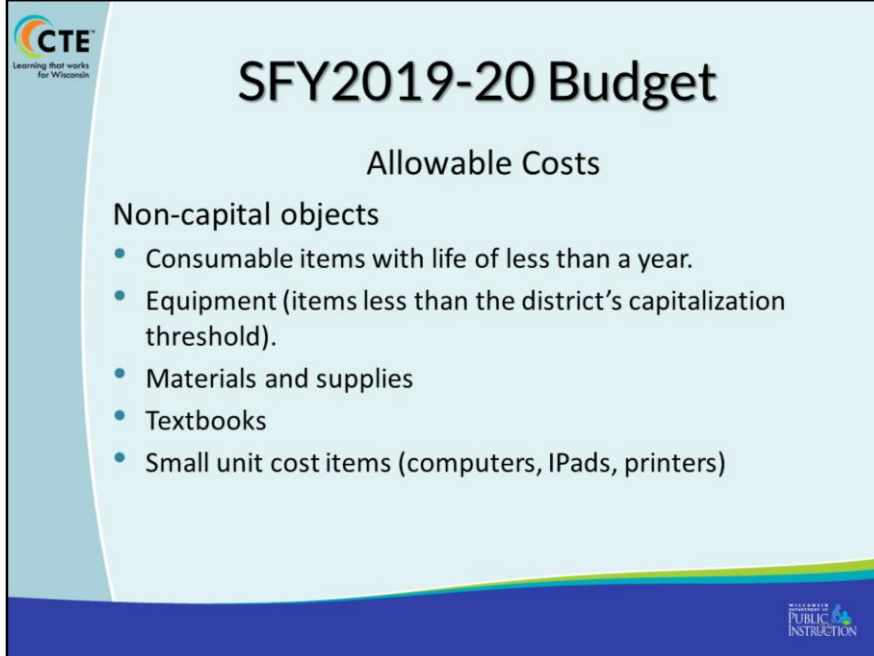
*WUFAR Manual 11-2 through 11-5 describes coding for **purchased services***

Purchase Services typically include:
- For personnel not employed by the fiscal agent
- For employee travel
- PD registration
- Consultant fees
- Student transportation costs

SFY2019-20 Budget

Allowable Costs

Non-capital objects
- Consumable items with life of less than a year.
- Equipment (items less than the district's capitalization threshold).
- Materials and supplies
- Textbooks
- Small unit cost items (computers, IPads, printers)

Non-capital objects include equipment with a small unit cost, as well as supplies, computers and software.

**The amount of your budget that goes toward consumable supplies should be minimal; making up a ver small percentage of your budget.

SFY2019-20 Budget

Allowable Costs

Capital
- Property with a useful life of more than one year and an acquisition cost of $5,000 or more per unit.
- An LEA may use its own definition of equipment, but must also include the above.
- Equipment must be inventoried, tagged, tracked.

What is not a Capital expense?
- Consumable materials or supplies.
- Anything that is not intended to last for at least one year.

WUFAR Manual pages 11-6 through 11-8 of the WUFAR describes the codes for capital objects.

See: Purchasing Equipment with Carl Perkins Guidance on DPI website for more information.

Capital costs are those things above the $5,000 threshold, and that has a life of more than a year.

Guidance related to Equipment purchases and requirements for documentation , records and disposal are on the DPI website.

For an example, we are going to walk through the coding process for personnel.

First, is the cost related to Administration functions related to the grant? This is an example for the CTE Coordinator. The grant requires that only licensed CTE teachers and CTE Coordinators are allowed to be paid with Perkins so you see an ELO field. Substitutes and other school personnel such as clerical will not require the ELO field be completed.

In this example I am budgeting for the CTE Coordinator position for administration portion of salary.
Red arrows indicate required fields.

Coding Non-Capital Objects

First: Select *Program Type* (is cost related to Admin. or CTE programming?)

> Type of Purchase
> It's for CTE instruction
> Voc Tech Default
> Amount

> [Ledger and Vendor are for your use only]
> Detailed description of the purchase

> Rationale/Goal
> Program Activity (POS)
>[Consortia enter district name]

Required fields will have a red arrow.

This purchase is a non-capital cost for the CTE program (not admin costs)

According to this example, it's instructional Media of some sort.

It is for CTE instruction which is a part of Vocational Curriculum

It is for the purchase of Software

The cost is $500

As mentioned earlier, Ledger and Vendor fields are optional for your internal use only, so there is no red arrow.

You are asked to complete a detailed description about the purchase

The required rationale for the purchase was selected (provide students with strong experience and understanding of all aspects of an industry)

Program of Study was selected (Programming and Software)

And as mentioned earlier, District is only required for a consortium application.

Coding Personnel

Position	Area	Activity	Name			
Staff	No Description Beyond Position	Extended Contract-Professional Development	Instructional Staff Training	FACS Advisor Stipend (name to be determined)	Provide students with strong experience and understanding of all aspects of an industry.	Restaurants, Food, and Beverage
Admin	Career and Technical Education Coordinator	Extended Contract	Susie Snowflake	Vocational Education Supervision & Coordination	CTEC extended contract	$238.00
Teacher	Business Education	Extended Contract-Curriculum Development	Bruce Lee	Curriculum Development	Summer meetings with dept. to align curriculum	Provide students with strong experience and understanding of all aspects of an industry.	Accounting	$500.00

Okay, so now we're going to get into some nitty gritty examples of errors and best practices when budgeting and coding.

Just a for-warning that some of the formatting for the line items aren't perfect, due to the cutting and pasting, using screen shots and reconfiguring the line item reports from last year. But regardless it can help identify some common errors and corrections.

Let's look at the **first line** for personnel:
- A stipend for staff is indicated. The detail says it's the FACS advisor. If you are paying salary or stipend, it must be a person with an appropriate license, you cannot circumvent the ELO requirement by indicating "staff". You can only budget for hired employees.
- Staff refers to district personnel **other than** teachers; such as counselors, principals, and administrators.
- Licenses will be looked up automatically via system.

The **second line example**: This is for CTEC Extended contract. The description also says extended contract, this in incorrect since we already know it is for extended contract and that it is for administration related tasks. This is a **rare** case further information is not needed, it's self explanatory.

Example 3: This is a **correct** example of an extended contract for curriculum development. The description says it will happen in the summer with a focus on curriculum alignment for accounting POS. This is clear and can be easily reviewed and determined to be an allowed expense.

Coding Personnel

Not Correct

CTE	Career and Technical Education Coordinator	No Description Beyond Position	Standard (Default)	Suzie Smith	Vocational Education Supervision & Coordination	Meet, coordinate and assist member districts.	Provide students with strong experience and understanding of all aspects of an industry.	$45,883.00

Correct

CTE	Career and Technical Education Coordinator	No Description Beyond Position	Standard (Default)	Suzie Smith	Vocational Education Supervision & Coordination	Meet, coordinate and provide TA to member districts.		$45,883.00

Here, in the top example the rationale that was selected (provide students with strong experience…) does not align with the role of the CTE Coordinator.

Due to the nature of the work of the CTE Coordinator, the rationale is not required for line items dealing with pay for the CTEC.

Coding Personnel

Incorrect

Teacher	Technology Education	Extended Contract-Curriculum Development	Judith Boese-Bookstaff	Curriculum Development	Curriculum Development and Professional Development throughout the year.	Provide students with strong experience and understanding of all aspects of an industry.		Engineer and Tech	$300.00
Staff	No Description Beyond Position	Extended Contract-Professional Development	Instructional Staff Training	Curriculum and Professional Development for teachers unable to be listed individually at this time.	Provide students with strong experience and understanding of all aspects of an industry.		General Management		$10,000.00

Correct

Teacher	Business Education	Extended Contract-Curriculum Development	Charlie Brown	Curriculum Development	Summer meetings with dept. to align curriculum			Accounting	$500.00

Alright, lets see if you can do this one…. In the first line, can you identify what the error is?

The activity selected was curriculum development but in the description it talks about professional development. Professional Development was selected from the drop down menu but Curriculum Development is tin the description filed. That needs to be coded on a separate line.   In addition, the rationale doesn't align. PD and Curriculum Dev are not providing students with strong experiences in an industry. The law is referring to instruction.

In the **second line,** what is the issue? In the Description says PD for teachers who are unable to be listed. Staff refers to counselors, administrators, not teachers. These individuals would not be coded as staff, but rather individually licensed teachers. As I mentioned earlier, you cannot budget salaries for people that do not yet exist.

There must be an intentional plan for academic teachers to receive PD related to curriculum integration. It can't be general; and must be to be to move a POS forward.

Curriculum development outside of contracted time as well as PD must be planned for

with specific purpose and cannot be coded generically for every CTE teacher in district.

The bottom example is correct as it identifies the business education teacher, its extended contract for curriculum development, which will occur over the summer in order to align accounting curriculum.

Everything aligns and it is very clear for the review and easily approvable.

Here are some examples of coding for **purchase services**. The top example has lots of issues.

Employee travel is being purchased, (okay) but in the description registration is listed. Registration is not a travel cost. Travel costs only refer to tsp., meals, hotel and parking.

Registration should be coded as you see in the second sample, as a private vendor contract; it's a purchase from a trainer, conference, or convention vender.

You can combine registrations into one line item as long as you clearly describe the name of the PD. We don't require teacher names, but travel costs are only for CTE licensed teachers or teachers working in collaboration with
CTE teacher.

Note how registration is indicated in the description of the correct version so that we know it is for a conference vs. someone hired to provide PD to district. If the district was paying to bring someone in that would be indicated in the description. It would be

coded the same, but the description would be different.

Okay that was fun.

Let's try this one. The top example was a common error this year. Part of the reason is because of the way it was programmed into WISEgrants, which will be changed for this year.

In the **first example**, communication was selected because the health care academy person was doing outreach. We don't know what that outreach was. The problem is that while you may be communicating with groups, the purchase of communication means a type of communication. So in the description, we should see things like "printing"; webcast subscription; facility rental.

What is confusing is that Stipend is indicated in the description. Stipend for what? Stipends are considered salary so time dedicated to a meeting should be coded in personnel, not communication. We also saw some cases where "meetings" in the description for communication. Again, what is being purchased related to communication? You don't purchase a meeting. However, you may purchase materials for the meeting which would be indicated as such.

The **second example** is pretty good; it indicates the purchase of communication for

program outreach; the description of what is being purchased is video conferencing capability. My only question would be the rationale and if it aligns. If students are gaining experience, it should probably be related to instruction, not Voc Ed Coordination.

Coding Purchase Services

Descriptions

Employee Travel	Professional Development (Instructional Staff)	Instructional Staff Training	Attendance and ~~membership~~ in business organization to develop work based learning opportunities	rational Activities that support special populations prepare for high skill, high wage or high demand occupations.		$1,200.00
Employee Travel	Professional Development (Instructional Staff)	Instructional Staff Training	Childcare conference	Develop, improve and expand use of technology in CTE including training and skills that lead to entry in technology fields.		$350.00
Employee Travel	Professional Development (Instructional Staff)	Instructional Staff Training	Childcare conference: Providing support for family and consumer science programs.	Other: "Permissible Activities"		$350.00

More related to purchase services. Hopefully you've been able to follow along fairly well.

In the first line item membership in a business organization is not a travel expense, so it must be coded as a separate line item.

The description should also include what is being attended; A conference, meeting, or other activity.

The Rationale selection is interesting. Is the attendance at a training, meeting or membership related to preparing special populations for high skill wage and demand occupations? I'd want to know how does the membership (mentioned in the description) support special populations?
Support for special populations should focus on programming to make CTE accessible in high skill, high wage or high demand occupations. But it could involve training if that is needed. So you can see, this brings up a lot of questions for the reviewer.

The second example is also not correct because the rational/required activity is specific to technology fields, not child care. Child care is not a required activity, so you won't

see it listed as an option from the rationale drop down [but it is a permissible activity] so can be selected as long as required activities are being done.

So in the third example, you can see that "other permissible activities: was selected with the description that is clear that it is for travel to the child care conference for PD.

Coding Purchase Services
Descriptions

In the first example there is an elaborate description which is not necessary. Keep descriptions clear and to the point.

As a result of the drop down selections, we already know it's a sub for a student field trip. For sub coding, it is not necessary to say where the trip is going (you would say where for student tsp., but not for this). This one could say, just to be a little more clear could say, "Sub for taking students for Auto Skills test as the bottom example indicates.

Coding Purchased Services

Private Vendor Contract for Support Services	Professional Development (Instructional Staff)	Instructional Staff Training	Conference Registration for NAF Next - Academy of Health Science (Therapeutic Services)	Provide professional development to school personnel involved in academic and CTE course integration.	$2,500.00
Private Vendor Contract for Support Services	Professional Development (Instructional Staff)	Instructional Staff Training	Conference Registration for NAF Next - Academy of Health Science (Therapeutic Services)	Provide professional development to school personnel involved in academic and CTE course integration.	$1,875.00

Both of these examples are from a consortium and are line items for a district. This is fine, but to save effort, they could have been combined into one line item under Therapeutic Services POS. Just indicate the name of the conference, that it's for registration and how many staff.

Coding Purchased Services

Pupil Transportation	Instructional Field Trip	Field Trips - District Operated	Field trip to WCTC Manufacturing Fair	Provide students with strong experience and understanding of all aspects of an industry.		$2,400.00
Pupil Transportation	Instructional Field Trip	Field Trips - District Operated	Waukesha Business Alliance 21st Century Manufacturing Industry Pathways	Provide students with strong experience and understanding of all aspects of an industry.		$1,500.00

Similarly these two could have been combined. This is for the same school within a consortium. They could have been combined the two by indicating the Manufacturing POS from drop down and included the description: "WCTC Manufacturing fair and Waukesha business alliance 21st Century Manufacturing Industry Pathways field trip".

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The way this is coded brings up a lot of questions.

First, This is incorrect because a CESA or any other fiscal agent, cannot contract with themselves for services.

The option of CESA contract is intended for single districts or a consortium who may be contracting with a CESA for, say PD.

The description is confusing. All the things listed; Stakeholder engagement, collaboration, with a focus on special populations is part of the duties of a CTE Coordinator/fiscal agent, so there would be no separate contract for that type of work by a fiscal agent for their members.

Coding Non-Capital Obj.

Incorrect

This description does not tie to the purchase or Rationale.

Equipment Rental	Equipment Rental	Vocational Curriculum	Vendor contract to set up and clean up gym for career fair. Tables, tablecloths, and booth backdrops are rented.	Activities to support special populations prepare for high skill, high wage or high demand occupations.	General Management	$4,000.00
Supplies	CTE Instruction	Vocational Curriculum	Food for use in culinary lab projects. Kitchen supplies (paper, cleaning solutions, plastic and aluminum wrap products). Working to attract male, non-traditional students.	Activities to address non-compliance with Core Performance Indicators.	Restaurants, Food, and Beverage	$8,631.00

Okay, on to Non Capital items.

The first example, is not a great fit for equipment rental, but probably should have been purchased services.. According to this it was for items and services related to a Career Fair for the General Management POS. Was it only for students in Geneeral Management POS? This may be questioned.

The other question in the first example is related to the rationale selected (highlighted in yellow) - How is equipment rental designed to support special populations? Did only Special Pops who are General Management POS attend the career fair? What was purchased that would meet their needs?

In the second example, it begs the question: purchase of a lot of supplies to address the Non-Compliance with core indicators (see the rationale in yellow). How do those supplies attract male non-traditional students? To me, those items have nothing to do with attracting male students. If you select the Performance Indicator rationale, you must also say which indicator it is referring to in the description. $8,000 seems like a lot dedicated to consumables.

The rationale **must align** with the activity and description or cannot be selected. Your budget will not be approved without clear alignment.

Non-Capital

Incorrect

| Non-Capital Equipment | CTE Instruction | Hand Tools | 40 | Vocational Curriculum | ~~Non Capital Equipment:~~ Engineering. Drills, sanders, wrenches, vinyl cutters, 3d Printers~~, and other items to deliver engineering and technology curriculum.~~ | Improve, expand, adapt, and modernize equipment to strengthen POS through relevant technology. | Engineer and Tech |

In this description isn't bad, but there is redundancy in the description. Didn't need to say for non-capital equipment or engineering and tech curriculum, because instruction is already selected from the drop down as well as the POS (last column). Keep like purchases together as one line item. Know what you plan to purchase. To reduce redundancy, I've crossed out what is not needed.

In this example, all we need to know is what hand tools are being purchased for Engineer and Technology in order to improve, expand and modernize equipment. The fact that the number of hand tools is indicated is also correct.

Coding Non-Cap Equip and Supplies

Incorrect

Supplies	CTE Instruction		Vocational Curriculum	Emulators, robotics equipment, etc. as required to update and align curriculum to industry standards and dual credit coursework.	Develop, improve expand the use of technology in CTE including training students and school personnel; provide students skills that lead to entry in technology fields; and offer internships and mentoring.	Information Support	
Non-Capital Equipment	CTE Instruction	Lab Equipment	Vocational Curriculum	Equipment needed by our Culinary departments to continue to move programs forward and align to ProStart.	Improve, expand, adapt, and modernize equipment to strengthen POS through relevant technology.	Restaurants, Food, and Beverage	

Correct

Textbooks / Workbooks	CTE Instruction	Vocational Curriculum	Textbooks for new articulated courses with MATC: Medical Terminology and Healthcare Careers	Link secondary-level CTE program to Postsecondary by offering comprehensive Programs of Study.	Therapeutic Services	$6,300.00

First example the selection says supplies but the description says equipment. The question your reviewer will have is, Which is it? If we are talking supplies to build a robot, don't use word equipment in the description, as equipment should be coded differently.

In second example, what exactly is being purchased? The description is a restatement of the rationale, but doesn't say what is being purchased.

In the Correct example, we see that text books are being purchased, that it is for instruction, the description clarifies it is for a new articulated course with MATC. The rationale for the purchase is to link secondary program to the postsecondary level program. – This is a beautiful example showing clear alignment of the purchase with the requirements of the grant.

Coding Non-capital Obj

Inappropriate

Supplies	CTE Instruction	Vocational Curriculum	Biotechnology and Research Development equipment: 1 & 2 mL pipette pump; case of 12 Edvotek Micropipette, 0.5-10 uL Edvotek Micropipette, 10-100 uL Microcentrifuge Tube Rack, 20 well FitBits (SIZE SMALL) RoadIDs 5 & 10 mL Pipette Pump, case of 12 Edvotek Micropipette, 2-200 uL Scout Balance with Backlit LCD Screen, Ohaus 25 mL Pipette Pump Lab Incubator, 0.7 cu ft DNA DuraGel, Simulated Agarose Gel Practice, 6 pack TetraSource 300 Power Supply for electrophoresis tanks Pipet Stand, 6 bay (for Edvotek Pipets) Vortex Mixer Scissors Bio Cam Consise Dissection Charts & Guide Water Quality Testing III: Multiplex PCR for Contaminants - Kit #953. Lab-Aids Qualitative Introduction to Water Pollution Kit Carolina Forensic Dissection Kit for a class of 32. Carolina's Perfect Solution Pig, Plain Injection, 1 Per Bag, 13 in+. Radish Seeds Resealable plastic bags (sandwich size) Jobs plant food spikes Custom PLTW Scientific Laboratory Notebook Aquasonic Gel, 250 mL Bleach, 1 gallon, unscented Denatured Ethyl Alcohol, 95%, 500 mL (also known as Ethanol) Disposable Serological Pipets, 10mL, .1mL markings, 200 pack Disposable Transfer Pipets, Narrow Stem, 500 pack Edvotek Blue Pipet Tips, 100-1000 uL, 10 x racks of 100 tips Edvotek Pipet Tips, 0.5-10 uL, 10 x racks of 96 tips Edvotek Yellow Pipet Tips, 1-200 uL, 10 x racks of 96 tips Electrophoresis Refill Melt, Agarose Powder, 0.8%, 200 mL Elmers Glue, 4 oz, 4 pack Glue stick (.28 oz), 24 pack Heavy Duty Aluminum Foil Hydrochloric Acid, 0.1 M, 1 liter Inoculating Loops and Needles, Sterile, 250 pack Isopropyl Alcohol, 99%, 3.8 L Masking tape, 1 in x 60 yd, 9 pack Microcentrifuge Tubes, 500 pack	Provide students with strong experience and understanding of all aspects of an industry.	Biotechnology Research and Development

So this is way too much detail. Here I highlighted some possible editing. We already know it is for Biotech Research and Development (see last column), so that did not need to be included in description.

There are a lot of different things combined here. Consider, what could have been combined for one line item? Perhaps all the Micropipettes could have all been lumped together with the number purchased indicated. The Hydrochloric Acid, power supply, could have been another line item.

It could be argued that Elmer's Glue, sandwich bags and jobs plant food and a number of the items while needed, are consumables and Perkins funds should be used for those items on a limited basis.

This is a more appropriate description for supplies. We need to be somewhere between every box of nails being listed and just the word "tools".

The only thing that could be argued here is that socket, allen and hammer sets do not meet the rationale of improved, expand, modernize equipment. These items will be looked at with more scrutiny.

Remember the focus of perkins is to improve, expand and update as is stated in the rationale that was chosen.
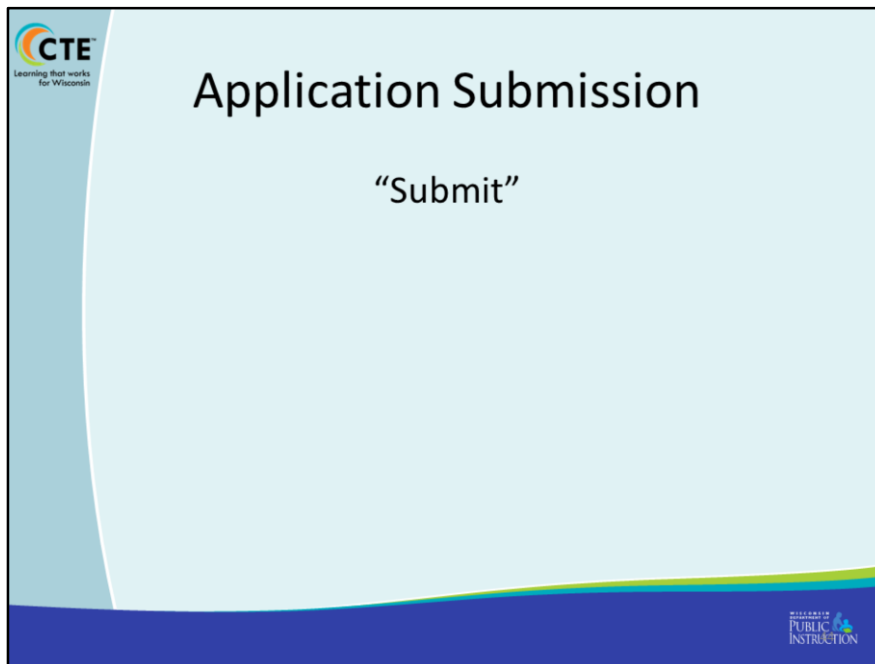
Once all the sections of the Perkins application are complete, you may hit submit. You will not be able to access your budget or any part of the application again. So be sure it is ready to submit before doing so. If you hit submit accidentally, send a message to your reviewer asking them to return it to you so that you can make the needed changes.

Well there you have it. Perkins budgeting in a nut-shell. If you have any questions do not hesitate to contact my via email as that is usually the best way.

Have a great day!