

Perkins V Grant Information
and
Application Instructions
FY2024-2025

(Year 1 of the CLNA and
Perkins Grant Application Cycle)

Applications Due: April 30, 2024

Grant Period: July 1, 2024 - June 30, 2025

Contents

Strengthening CTE for the 21st Century Act (Perkins V) Overview	3
Perkins Grant Eligibility	3
Comprehensive Local Needs Assessment (CLNA)	Error! Bookmark not defined.
CLNA Process	
CLNA Focus Areas	
Career Pathways	
Budgeting	5
2023-2024 Grant Year Application Instructions	7
Additional Resources	14

Strengthening CTE for the 21st Century Act (Perkins V)

Under the Strengthening CTE for the 21st Century Act (referred to as Perkins V), much of the law remained the same. However, some changes now require a fresh look at:

- How CTE program decisions are made,
- How quality is implemented, and
- How successful student outcomes can be achieved.

The required Comprehensive Local Needs Assessment (CLNA) process that grant applicants undergo, provides an opportunity to: gain broad stakeholder involvement; serves as the vehicle for data analysis; and is the **driver** of moving programs forward over a two-year period.

Through robust data analysis, gaps in student or program outcomes are identified. This provides the framework for **data-driven decision-making**, by informing practices and priorities, that will reduce data gaps and lead to positive outcomes for **all** students.

Equitable practices are tied closely to quality CTE programs. As such, the CLNA findings provide grant applicants an opportunity to take a deep look into what is and is not working for certain groups of students defined in the Perkins law (as Special Population groups) and the Every Student Succeeds Act (ESSA).

This approach opens opportunities for grant recipients to pivot from what was done in the past to a continuous improvement approach that continuously moves the needle forward on student outcomes.

Perkins Grant Eligibility

Local Education Agencies (LEAs) who wish to apply for the grant **must**:

1. Have a preliminary formula allocation of at least: \$15,001.
 - a. The formula is applied to every public or charter district that offers K-12th grade.
 - b. The preliminary allocation information posted to the DPI website is used by LEAs to determine if they are eligible to apply for funds on their own or if they need to join a consortium to meet the requirement.
2. Have employed a DPI licensed CTE Coordinator, who leads and coordinates district CTE programs, including the Perkins grant application and implementation.
3. Have at least one career pathway that meets the requirements of size, scope, and quality (SSQ), that reflects local, regional, or state labor market needs.
4. Conduct the comprehensive local needs assessment (CLNA) as laid out in Sec.134 (or participate as a member of a Perkins grant consortium).
5. Abide by state, federal and program assurances related to grant fund implementation.

Comprehensive Local Needs Assessment (CLNA)

To be eligible to apply for and receive funds, an applicant must conduct a comprehensive local needs assessment (CLNA) at least every two years. [Section 134(c)]

“To be eligible to receive financial assistance under this part, an eligible recipient shall— (A) conduct a comprehensive local needs assessment related to career and technical education and include the results of the needs assessment in the local application submitted under subsection (a); and (B) not less than once every 2 years, update comprehensive local needs assessment.”

Once the CLNA is completed, with the data gaps, root causes of those gaps identified, it should drive discussions and decisions leading to development of a strategic plan to address the gaps. The application will ask about the CLNA findings, goals, measures of improvement, activities, and a budget that supports closing the data gaps.

CLNA Process

The CLNA is conducted every two years to inform local education agency (LEA) priorities for a two-year period. As detailed in the CLNA Guide, the CLNA process must:

- Obtain and analyze disaggregated student data.
- Have significant stakeholder consultation; and
- Serve as the driver of goals and local initiatives to improve and modernize (not maintain) CTE programs and career pathways, ensuring that skills taught in CTE programs are aligned with industry and labor market needs and are accessible to all students.

There are four focus areas of the CLNA and the grant application:

- Performance on federal accountability indicators,
- Educator recruitment, retention, and training,
- Progress toward equity and access, and
- Career pathway evaluation of progress.

As data in each focus area is evaluated, gaps related to the data are identified. A gap is when data reflects a significant difference between “what is” and “what should be.” Gaps tend to reflect unaddressed needs, which can impact an individual, group, school, or an entire community. Examining the gaps closely, through a root cause analysis process, helps uncover what is **truly** needed to move toward improved data outcomes.

[The Comprehensive Local Needs Assessment Guide](#), provides detailed information on the CLNA requirements and process.

The Perkins application requires applicants to provide information on their analysis including their findings (gaps, root cause and aligned needs), and the goals and activities that will close data gaps.

Career Pathways Size, Scope, and Quality (SSQ)

Perkins law requires that grant recipients offer CTE career pathways that are of sufficient size, scope and quality to be effective and that funds may only be used to support such programs.

- **Size** means that an applicant offers at least one career pathway that aligns with state, regional, and/or local labor market needs.
- **Scope** means that a minimum of two CTE courses in a pathway from introductory to more advanced levels is available to students, including that articulation options for postsecondary credit are incorporated into the ACP service delivery and advising.
- Wisconsin currently defines a **quality** career pathway as detailed in [Appendix A, Size, Scope and Quality](#) document. To be approved for funding, a career pathway must currently be implementing **three out of the five** elements, and be fully described in the application as laid out in Appendix A, encompassing:
 - A progressive sequence of at least two CTE courses aligned to the career pathway (required).
 - A work-based learning experience aligned to the sequence and the pathway.
 - Ability to attain an industry-recognized credential which is deemed *required* or *highly* valued by employers in the pathway.
 - A dual-credit college course aligned to the sequence and *required* for the pathway; or
 - An active CTSO aligned to the coursework scope and sequence, curriculum, and the skills necessary in the pathway.

Budgeting

Grant recipients are responsible for the integrity of the grant, ensuring that expenditures follow the purpose and the intent of the law. The following resources provide information needed to budget funds in compliance with applicable regulations:

- Perkins V Act and the Perkins V Wisconsin State Plan
- Education Department General Administration Regulations (EDGAR)
- Uniform Grant Guidance (UGG) and the
- U.S. Department of Education Non-regulatory guidance
- Wisconsin Uniform Financial Accounting Requirements (WUFAR)

The DPI [Allowable Cost Checklist](#) for Federal Funds is a good resource to determine basic allowability of an expense under the UGG and EDGAR. Finance resources should be

referenced prior to creating grant-related budgets, to avoid issues with budget approval. See the [Perkins Budgeting](#) detail and cross-walk for additional limitations and explanations.

Budget Amendments and Claiming

Budget amendment requests may be submitted, after the initial review and approval of the grant application and budget.

- A budget amendment request is **required** following the “final allocation” of funds. This usually occurs in September (within the first quarter of the grant) and is due by Nov 1st.
- Additional requests can be made throughout the grant period (up to June 30), and are subject to review and approval by the DPI CTE Team.
- A **message** posted to the WISEgrants message board **must** accompany all requests. The message must detail line items that are removed, and which items are added, along with the rationale, and how the decision was made to add or remove items.

10% Rule: Under rules set forth by the Federal UGG, subrecipients are allowed to claim an overage of line items without submitting a budget amendment as long as the accumulated line-item overage does not exceed 10 percent of the approved budget (and is within the approved total budget amount). The WISEgrants system is designed to allow this flexibility. Note that it will stop a claim when the total overage exceeds the allowed 10 percent, without having first received approval through the budget amendment process.

Grant Review

Once the LEA CTE coordinator (CTEC) *completes* the application sections, the assigned DPI reviewer will be notified via the system email. Each section will be reviewed and “Accepted” or edits or clarification will be requested. The CTEC will receive a message notice in their mailbox. Budgets will be approved or returned for edits. Returns will be accompanied by a message posted to the message board from the reviewer explaining what is needed. All communication regarding application corrections should take place via the WISEgrants messaging functionality.

Post-Application Monitoring Process

Grant recipients may be selected by the DPI CTE team to participate in a monitoring process. The purpose of monitoring is to review recipient documentation to make sure grant requirements are followed and that the education offered through the grant is in line with the Perkins V Act and the Wisconsin State Plan. A review of SSQ elements of consortia member districts, may also be conducted as part of the process.

Application Instructions (Year 1)

Pre-Application Tasks

A. Complete the Perkins grant CTEC Contact Form (February)

This form is completed separately from the WISEgrants portal. The Google form can be found on the DPI [Perkins Application webpage](#). The form must include the contact information for the fiscal agent CTEC and status of CTEC's license.

Agencies who serve as the fiscal agent (FA) for a consortium, must also submit the [district designee](#) (DD) contact information spreadsheet via the contact form as instructed. The form should not be submitted until the member DD information is fully completed and uploaded.

B. Obtain access to the WISEgrants portal (February).

CTE coordinators and other personnel who require access to the WISEgrants [portal](#) must first have a professional WAMS ID. To register, users should use a work email connected to their WAMS account. The WAMS "[A Quick-Start Guide](#)" can assist with this process. In short:

- 1) Access to the system as a "user" is granted to the fiscal agent (FA) CTE coordinator (CTEC) by the FA Security Administrator. Approvals for CTECs should include both view and edit privileges. Note: Access previously granted carries over automatically from one year to the next.
- 2) Users will be able to view or edit parts of the CPA (Carl Perkins Act) application.
- 3) The [Guide to Accessing New and Existing Grants](#) provides systematic guidance for accessing related functions in the system.

Note: Always select the correct fiscal year from the dropdown menu in the upper right corner of the application as soon as you enter the system as it will default to the current year.

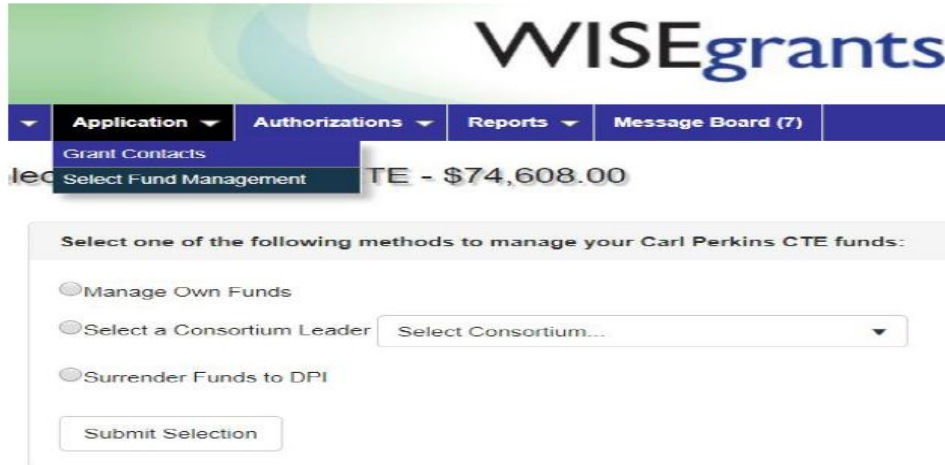
C. Fund Management Selection and Assurances (March)

Every LEA that is allocated funds through the CPA formula must complete the Fund Management Selection, regardless of whether they plan to apply for funds.

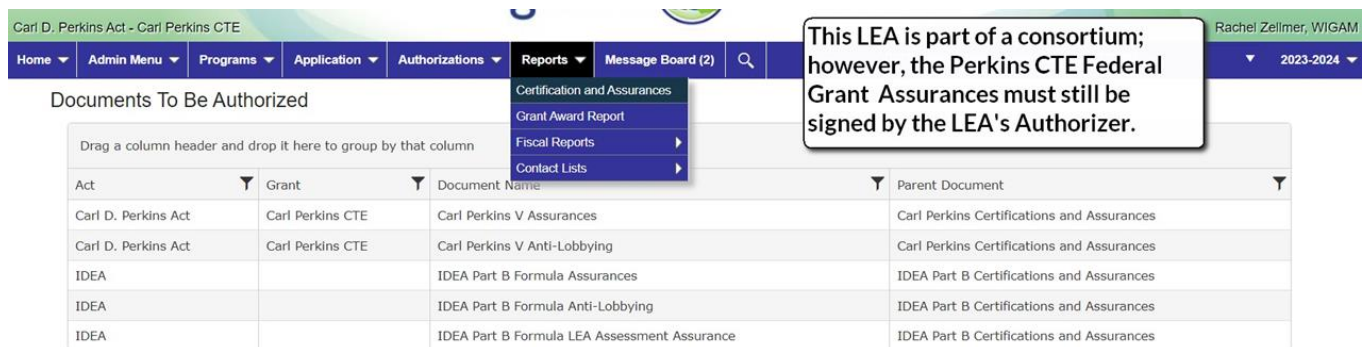
Once logged into the WISEgrants system, the district Authorizer (the person designated to make funding decisions on behalf of the district) must:

1. Select the correct **grant year** from the dropdown (in the upper right corner) to access the fund management function.

2. Select one of the options below on behalf of the LEA:
 - **Manage own funds** (single agency applicant - see Perkins grant eligibility),
 - **Select Consortium Leader** (this moves funds from the district to the consortium lead agency), or
 - **Surrender allocated funds to DPI.**



Once the fund management selection is completed, LEAs who plan to participate as an applicant or member of a consortium, are required to sign the Authorization (“assurances”) documents, thus agreeing to fulfill all requirements under the law. Agreements made with FA and participation in the CLNA process, must preclude selection of consortium leader.



When a consortium is selected, the LEA Authorizer must additionally sign the *Verification* document confirming that the LEA wishes to join the consortium selected. This must be completed before the funds are automatically transferred to the consortium FA.

A **consortium** is a group of LEAs that come together for the purposes of meeting the minimum allocation requirement, or for another locally determined reason. LEAs that join a consortium have participated in the consortium’s CLNA process prior to application and relinquish their allocated funds to the fiscal agent (FA). In a consortium, individual district allocations are consolidated and used in a way that benefits all members according to CLNA priorities. The grant application is completed by the FA CTE Coordinator or other CTE coordinator as assigned by the FA.

WISEgrants Functionality Tips and Tricks

- Select the correct application year (upper right), prior to navigating to the application.
- The WISEgrants pages are set to **timeout**. To avoid losing important information, draft responses separately, then copy and paste into the portal fields and **save often!**
- Sections of the application are editable until approval. Once applications are approved, applications may not be edited.
- Most sections can be downloaded for your records. Sections are saved in WISEgrants for the prescribed amount of time as dictated by records retention rules.

Application Tasks

The application for year 1, consists of **five** sections:

1. Stakeholder engagement
2. Comprehensive Local Needs Assessment (CLNA results for three focus areas)
3. Perkins Pathways (Career Pathways Evaluation of Progress)
4. Narrative and
5. Budget

The screenshot displays the WISEgrants application interface. At the top, there is a header bar with the text "Carl D. Perkins Act - Carl Perkins CTE". Below this is a navigation menu with several tabs: "Home", "Admin Menu", "Programs", "Application", "Authorizations", "Reports", and "Message Board (5)". The "Application" tab is currently selected, and its dropdown menu is open, showing the following options: "Grant Contacts", "Select Fund Management", "Comprehensive Local Needs Assessment (CLNA)", "Perkins Grant Narrative", "Perkins CTE CLNA Material Submission & Review", "Budget", "Submission History", and "Enter Claims". The "Comprehensive Local Needs Assessment (CLNA)" option is highlighted, and a sub-menu is visible to its right, containing "Stakeholder Reporting", "Focus Areas", and "Perkins Pathways". In the background, there is a large text overlay that reads "Fund Management Selected" and "TE - \$3,874.00".

Stakeholders

In this section applicants must identify participants in the CLNA process from each stakeholder group, their name or affiliation, and in what aspect of the CLNA they were involved. At least one stakeholder must be identified for each focus area. (Applicants need not identify all stakeholders involved.) Finally, you'll be asked to summarize the process used for engaging stakeholders in the various aspects of the CLNA process and the role stakeholders played.

Add Stakeholder

Stakeholder Type Local or Regional Business or Industry

Name of Individual Wade Krogwold

Agency, Organization, or Business Direct Supply

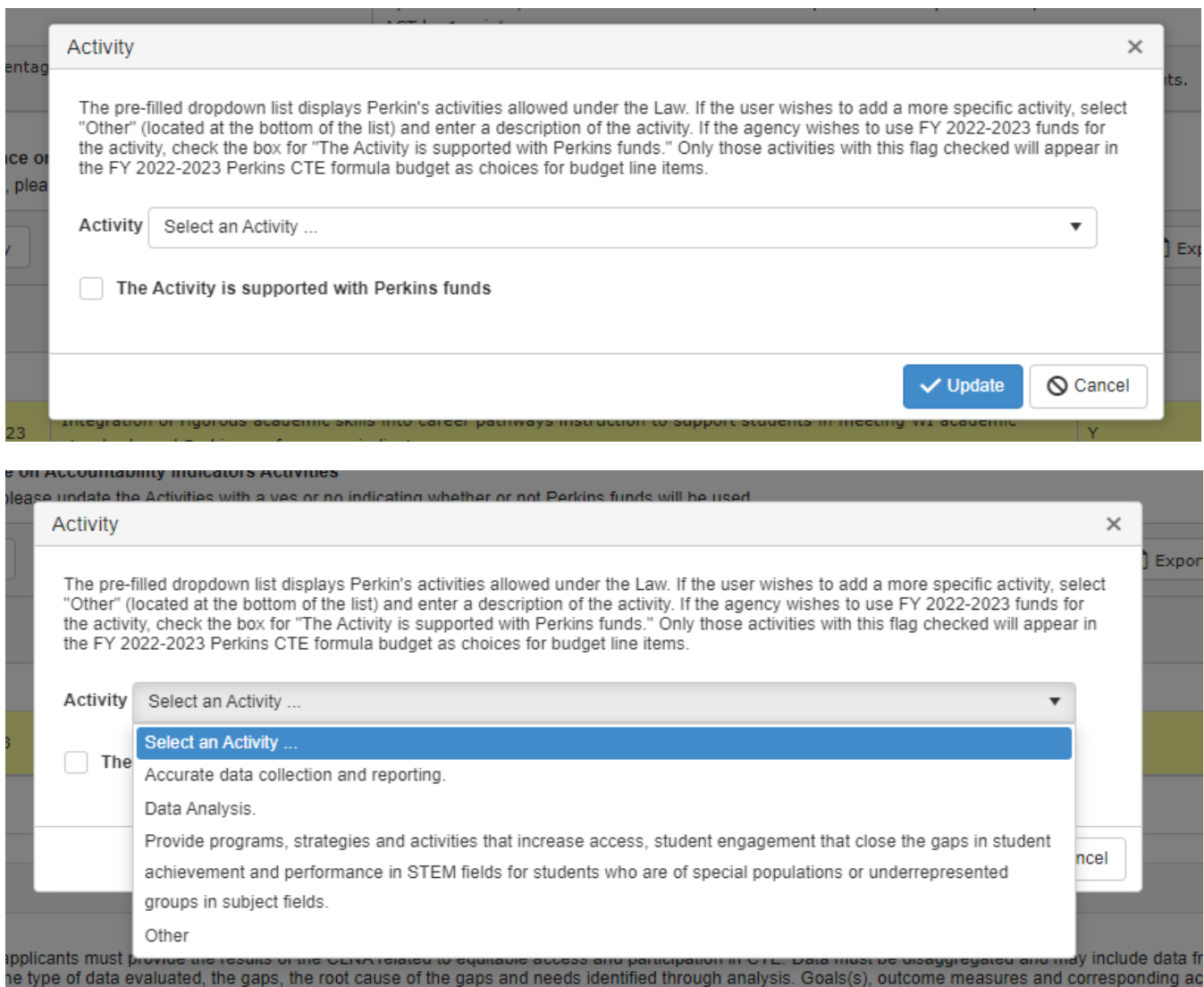
Area of Engagement Student Performance X Equity and Access X Educator Recruitment, Retention, and Training X Career Pathway Evaluation X

Comprehensive Local Needs Assessment Results Section

Focus Areas

Each focus area will have text fields for you to enter your CLNA results. This includes a description of the types of disaggregated data you evaluated and where you obtained the data from; your findings, including the gaps found and the needs identified through the root cause analysis; the goals and outcome measures that reflect mitigating the gap; and then the activities and whether Perkins grant funds will be used to support the activities.

Applicants may choose activities as allowed under the Perkins V from the drop-down menu or select "other" option whereby applicants may key in their own, more specific activities. If the activity is going to be paid for with Perkins funds, you will check the box.



Career Pathways Evaluation of Progress Section

All pathways for which the applicant wishes to use funds, must be entered for year one of the grant. The applicant will have to document evidence that there is local or state need for the career pathway entered. Then document which three out of the five quality components are provided to support the pathway in meeting the size, scope and quality requirement.

[Appendix A](#) provides detailed instructions related to what must be included as evidence of meeting SSQ for each component. Once the SSQ information is entered, the applicant must provide the CLNA evaluation of progress results. This is the same type of information that was required in the CLNA focus areas.

1) Enter Career Pathway

To add a new Pathway, select the career pathway from the dropdown. Applicants have the option to select a locally developed career pathway or regionally developed career pathway (must have received prior approval from the regional pathways collaborative). Agencies who

have an approved “Regional Career Pathway” will only need to provide the link to their approved pathway map as evidence of LMI needs and meeting SSQ.

Consortia must list the member districts that meet the SSQ requirements for each career pathway added.

2) Labor Market Information (LMI)

Share information on the resource(s) used to support the need for the pathway identified. Options include the DPI LMI website, a workforce development board, a regional economic development organization, a technical college, industry, and trade. Summarize the data used to support the need for the pathway.

3) Size, Scope, and Quality (SSQ)

Applicants must provide evidence that the pathway meets the requirements of SSQ by choosing two SSQ elements in addition to the sequence of courses (for a total of three components) currently available to students. See [Appendix A](#) for evidence of what must be provided.

- Sequence of courses for the pathway (required): List the sequence of courses that are available for students. The sequence must include at least two high school CTE courses that move from basic/introductory to more advanced within the pathway. A general introductory course that includes a number of pathways does not count as an introductory course.
- Work-based learning (WBL) opportunity (optional): Experience must align with the pathway courses. Indicate the WBL activity available to students that meets the Perkins V WBL definition and Appendix A. Include information on business and industry partners involved.
- Industry-recognized credential (optional): List the credential available that is required (or essential) for employment in the career pathway.
- Dual credit (optional): Dual-credit options offered must count for both secondary and postsecondary credit in the career pathway and may include advanced placement courses (as appropriate).
- CTSO membership (optional): Ideally, evidence of an active CTSOs (with paid state/national membership dues in the most recent year), must be aligned to the pathway curriculum. Appendix A outlines additional options and evidence considerations for an “active” CTSO.

Consortia are not required to enter SSQ data for each member district within the application; however, they must maintain supporting documentation spelled out in Appendix A, verifying that each member district listed in the pathway section meets SSQ for that pathway. This supporting information may be required to be submitted as part of a monitoring process later in the grant year.

4) Pathway Evaluation

This is the CLNA portion of the career pathway section. Information on the data reviewed, findings related to data gaps and root cause, goals, measurable outcomes, and activities to be implemented are all entered here, the same way they were entered for the focus areas.

Budget

Entering budget line items

The budget for the application must be developed based on the preliminary allocation. Planned purchases must clearly tie to the activity that addresses the gaps and needs reflected in the CLNA results, ultimately improving outcome data and closing the identified gap.

CTE coordinators must consult with their business office personnel to ensure proper coding of items. The required budget documentation includes:

1. Selecting the budget area (e.g. Personnel)
2. Selecting the “type” of purchase (administration or CTE). Administration is allowed for all expenses that deal with FA administering the grant.
3. The dropdown options (categories and function codes according to Wisconsin Uniform Financial Accounting Requirements) chosen will determine what additional fields are required. Required fields are indicated by a red arrow (<).
4. All budgeted items must include the unit being purchased (how many) and a clear **description of the item** being purchased (not the reason for the purchase). Description means the name of the equipment, training, supply, or educators attending PD.

Examples:

Private vendor/personal services: Include the name of the conference, the content area personnel attending, and number of attendees. Allowable PD must be those activities that are sustained, intensive, collaborative, job-embedded, data-driven, and classroom-focused.

Software as a service: Maintenance for technology equipment not provided by the school district and includes ongoing service agreements for technology hardware and software.

Travel: Travel for PD must include the name of the conference, location, content area personnel, what is being purchased (mileage, lodging), and number of attendees.

Field trips: The purpose of travel must be tied to curriculum for a career pathway that meets size, scope, and quality (SSQ). Travel for the purpose of college exploration is not allowed.

Consultants: Consultants or trainers are those hired to advance initiatives, such as curriculum development, professional development to improve CTE teaching strategies, and academic course integration. Include the dollar amounts to be expended and the specific activities, and /or services (e.g. training or strategic planning) provided by a consultant.

Supplies and Equipment: Name the items being purchased. Equipment requires the # purchased. Example of description for equipment:

- Incorrect description: “Misc Welding equipment” (this is too general)
 - Correct description: 2 Welders and 5 helmets
- Incorrect description: “Misc. equipment. Instructor would like new lab.”
 - Correct description: “Food processor (2), mixers (2).”

5. Select the activity that aligns with the purchase to meet the CLNA focus area goal.

a. The activities identified in the CLNA and pathway evaluation results will pre-fill as dropdown options. Select the one that aligns with the purchase. ***If none of the approved activities align with the purchase, the item may not be purchased.***

b. An activity aligned to the above examples, might be: “Update lab equipment to align with industry standards” (if that was a need reflected in CLNA results).

6. Consortia only: The school district is required for certain expenses.

7. Career pathway (dropdown). Career pathways identified in the application will pre-fill into the dropdown options as well. [Consortia: only districts that meet SSQ for the pathway, may use funds for pathway related costs and instruction.] The following is an example of the budget functionality in WISEgrants highlighting the menu items for purchase of equipment for instruction in the regionally developed construction pathway:

The screenshot displays the 'Non-Capital Objects' form in the WISEgrants system. The form is populated with the following information:

- Program Type:** CTE
- Type of Purchase:** Non-Capital Equipment
- Function:** 130000 - Vocational Curriculum
- Equipment Type:** Lab Equipment
- Equipment Detail:** Welders
- Assurance:** Equipment will be used to support identified programs of study for CTE.
- Amount:** \$0.00
- Vendor:** (Empty field)
- CLNA Focus Area:** Pathway Evaluation of Progress
- Pathway:** SERCP-Construction
- Objective:** Select Pathway...
- District:** Transportation, Distribution, and Logistics

A dropdown menu is open for the District field, showing the following options:

- SERCP-Construction (highlighted)
- Arts, Audio/Video Tech and Communication
- Business Management and Admin
- Finance
- SERCP-Nursing

A 'Filter:' box is located at the bottom left of the form.

WUFAR (Wisconsin Uniform Financial Accounting Requirements)

WUFAR is the coding system used by Wisconsin to ensure budgets and claims are uniformly understood and implemented. The WISEgrants system houses a list of commonly used codes for Perkins related expenses. To assist applicants, appropriate codes are programmed in and may be selected from the dropdown menu when entering the Perkins budget. Common Perkins WUFAR combinations are listed and available to view in the system.

Note: In order for a budget line item to be approved, the purchase must show clear alignment to the activity, goal, and need as reflected in the CLNA results (Sec.135) and must adhere to WUFAR.

Additional Resources

[Appendix A: Size, Scope and Quality](#)

[Perkins V Budgeting Details](#)

[CTE and Perkins Grant Terms](#)

[Fiscal Agents](#)

[Use of Funds](#)

[Activities to Reach Goals](#)