MONTANA UNIVERSITY SYSTEM

OFFICE OF THE COMMISSIONER OF HIGHER EDUCATION

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Perkins Local Application Guide 2024-2025

GRANT APPLICATION DUE: 5:00 P.M.
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Learning that works for Montana CTE™

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I. Introduction

The Montana Board of Regents is the eligible agency responsible for the oversight of the state's Perkins V grants. The Montana Office of the Commissioner of Higher Education (OCHE), in consultation with the Montana Office of Public Instruction (OPI), is responsible for the overall administration of the Perkins grants at both the secondary and postsecondary levels.

The Perkins Program Manager within OCHE, along with the guidance of the Montana State CTE Director within OCHE, is responsible for the administration and oversight of Perkins V funding for the postsecondary and joint portions of the Title I Basic Grant and the oversight of Perkins V funding for the secondary portion of the Title I Basic Grant (Secondary Title I Perkins funds are administered through OPI). As required by Perkins V, OCHE must allocate 85% of the formula funds available under the Title I Basic State Grant to local eligible recipients, which includes qualifying two-year community colleges, tribal colleges, and two-year Career and Technical Education (CTE) programs.

II. Purpose

The local application process is designed to address performance shortfalls, facilitate local planning for CTE, provide direction in the use of Federal funds for CTE in accordance with the State Plan, and document how applicants meet the assurances specified in the law.

The *Perkins Local Application Guide* provides basic information relating to the responsibilities of the Postsecondary Grant Coordinator. This guide does not contain all-encompassing information but provides a summary of aspects of CTE grant information that will assist the coordinator. In addition, comprehensive information will be supplied through documents such as applications, instructional guides, supporting materials, and the MUS Carl D. Perkins website at http://mus.edu/Perkins/index.html.

III. Applicable Law

State/Federal Regulations

To comply with the intent of Perkins legislation, the Montana Postsecondary Perkins Program has applied both state and federal level regulations on the allocation of Perkins dollars. These restrictions are designed to assist in the planning of local application grants, and to assist in improving campus Perkins programs. These regulations are listed below.

The following is a listing of regulations applicable to Perkins Programs:

Education Department General Administrative Regulations https://www2.ed.gov/policy/fund/reg/edgarReg/edgar.html
2 CFR 200 is the current guidance PART 200—UNIFORM ADMINISTRATIVE REQUIREMENTS, COST PRINCIPLES, AND AUDIT REQUIREMENTS FOR FEDERAL AWARDS
34 CFR Part 76 (State-Administered Programs).
34 CFR Part 77 (Definitions that Apply to Department Regulations).
34 CFR Part 79 (Intergovernmental Review of Department of Education Programs and Activities).
34 CFR Part 80 (Uniform Administrative Requirements for Grants and Cooperative Agreements to State and Local Governments).
34 CFR Part 81 (General Education Provisions Act—Enforcement).
34 CFR Part 82 (New Restrictions on Lobbying).
34 CFR Part 84 [Government Requirements for Drug-Free Workplace (Financial Assistance)].
34 CFR Part 85 [Government wide Debarment and Suspension (Non-procurement].
34 CFR Part 86 (Drug and Alcohol Abuse Prevention).

34 CFR Part 99 (Family Educational Rights and Privacy).

Acknowledgement of Federal Funding
When issuing statements, press releases, requests for proposals, bid solicitations, and other documents describing projects funded in whole or in part with federal money, all grantees, including but not limited to state and local governments, shall clearly state:

- Percentage of the total cost of the project which will be financed with federal money; and
- Dollar amount of federal funds awarded to the project.

Supplement, Not Supplant
Funds made available under this Act for *CTE/basic education* activities shall supplement, and shall not supplant, non-federal funds expended to carry out *CTE/basic education* activities.

The "supplement, not supplant" provision requires that federal funds be used to augment the regular educational program, not to substitute for funds or services that would otherwise be provided during the relevant time period. Eligible recipients cannot use federal funds to supplant nonfederal funds that would have otherwise been used for a given expenditure.

Salaries and Administration
Perkins funding may be used as salary for work that is directly needed to accomplish the required and permissive uses of the grant, with the following regulations:

- No Perkins funding may be used for administration, outside of the 5% mandated by federal legislation. Administration consists of the following (this list is not inclusive):
  - Grant Management
  - Indirect Costs
  - Monitoring and Evaluating Program Effectiveness
  - Assuring Compliance with State and Federal Law
  - Administration of the Local Grant Application
  - Assisting in the development of the Comprehensive Local Needs Assessment (CLNA)
- Qualifying full-time salaries may be provided with Perkins funding ONLY if project justification and budget narrative clearly indicate the use of funds to "develop, coordinate, implement or improve" CTE programs. OCHE will determine the % of funding for a position based upon clear and concise definitions listed above. FTE salary requests may be determined to be at a lesser % at OCHE discretion.
- Institutions are responsible for providing required documentation to support Time and Effort reporting for ALL employees whose positions are funded partially OR fully with Perkins V federal funds. Time and Effort forms will be reviewed during the Monitoring process.
- Perkins cannot be used to cover more than 20% of a Perkins Coordinator's salary. Funding from Perkins for a Coordinator's salary must cover time spent on Perkins-related activities that do not fall under administrative duties.

Qualifying Programs
Perkins funding may be used to support CTE programs which clearly meet the stated goals and results from their CLNA. The results of the CLNA are the driving force behind how sub-recipients spend their federal CTE funds.

Restrictions

Perkins funds may not be used for the following activities (list is just some of the non-allowable activities). Please contact the Perkins Program Manager with any questions regarding allowable/non-allowable expenditures.

- Recruitment
- Pre-enrollment Services
- General and Stand-alone Assessment as a Pre-enrollment Activity
- Financial Aid Services
- Remedial Instruction
- Tuition
- Direct Student Assistance (Special populations will be considered on a case-by-case basis)
- Printing, Mailing, Communication related expenditures, paper, binders, envelopes or any type of general office supplies
- Consumable Supplies are not allowable: These are supplies that are 'used up'. Although a lot of great learning happens using supplies that must be 'used up' in the process, these simply are not allowable uses of Perkins funds based on Federal law. Items that do not retain their original identity or are made into other items are not allowable.
- Common examples of non-allowable consumable supplies include Welding rod, welding wire, steel, metal, CO2 Cartridges, ink, toner, printer cartridges, 3D printing cartridges/filament, lumber, paper, plants, potting soil, band aids, health science first aid kit supplies/gloves/alcohol swabs, etc.

IV. Eligibility

Tribal colleges, two-year colleges, and community colleges that have been in good standing with their local application funds for two years prior to the application year indicating a strong performance history and appropriate internal controls per 2 CFR 200 Uniform Grant Guidelines.

This includes adhering to grant application and reporting deadlines, submitting data, providing appropriate federal required quarterly Performance Plan Narratives and fiscal reports; as well as, pertinent fiscal documentation, adhering to all Perkins V program performance and Civil Rights monitoring.

An eligible recipient electing to participate in Perkins V funding must comply with all the requirements set forth in Perkins V, the State Plan, the Montana Perkins V Handbook, and these grant guidelines, including those parts dealing with program evaluation and reporting requirements.

Institutions wishing to qualify for Perkins funds must:

- Have Perkins qualified programs as outlined in the Classification of Instructional Programs (CIP) to pathway crosswalk.
  - Identify all programs using CIP codes and align with the federal standard in order to qualify
  - https://applymontana.mus.edu/careers/career-roadmap/career-pathways/
- Have enough Perkins eligible enrollments in approved programs to meet the minimum $50,000 grant requirement or participate as a consortium member (please see Section VI below for more information about consortia).
  - Perkins eligible enrollments are identified as:
    - Students who are PELL/BIA eligible and are:
      - Enrolled in a Perkins approved program
      - Taking 1 or more credits in the approved program

- Have the ability to report enrollment data, special population data, financial data, quarterly fiscal reports and required supporting fiscal documentation; as well as Performance Plan Narratives and program information requests all in accordance with 2 CFR 200 Guidelines and assigned deadlines/timelines.
- Must submit a completed Comprehensive Local Needs Assessment (CLNA) that directly ties all expenditure requests to the information gathered through that process. CLNA's have several federally required components including engaging consulting with a diverse body of stakeholders. Section 134 of Perkins V: For more CLNA guidance see: https://mus.edu/Perkins/grant_apps.html
- Activities and programs funded must be listed on the CLNA and be aligned with the results for it to be considered as an allowable activity both programmatically and for fiscal reimbursement.

Eligible recipients must annually submit a plan outlining activity for continuous improvement of all performance indicators and an improvement plan, if the College has missed the performance level of any indicator by more than 10%. The continuous improvement plan will outline appropriate adjustments to reach the planned performance level. An approved plan is required for funding. Submit plans to the Campus Folder.

By accepting Perkins V funds, an eligible recipient is ensuring that it will comply with all applicable state and federal statutes, rules, and regulations including EDGAR and 2 CFR 200 UGG Single Audit requirements. Applications will only be considered for approval if they meet the intended purposes of the Act and sufficient funds are available. Grant recipients must comply with all requests for printed or electronic copies of products created with Perkins V which is required by federal law.

Tribal colleges, two-year colleges, and community colleges that receive and have been in good standing with their local application funds for two years prior to the application year indicating a strong performance history and appropriate internal controls are considered eligible entities for Perkins V Local funds.

V. Consortiums

Federal Law states that a campus must meet a minimum individual allocation of $50,000 to qualify for Perkins funding. If an institution is unable to meet these requirements, they may form a consortium between two or more institutions in order to meet the qualifications. It is required that consortium members participate in joint projects that benefit and provide services to all members participating in the consortium. According to Carl D. Perkins law Section 132(a)(4), an eligible agency may waive the requirement of participation in joint projects in any case in which the eligible institution is located in a rural area. OCHE has applied this waiver, thus eliminating the requirement. Therefore, campuses eligible for less than an allocation of $50,000 may receive Perkins Local funds without completing joint activities with other consortium members.

It is important to note that individual **consortium members are not required to meet the six required uses of funding separately**, but rather are charged with providing programs of sufficient size, scope, and quality to be effective (Sec. 132(a)(4)).

I. Montana Definition of Size, Scope and Quality

Montana's definition of Size, Scope and Quality can be found in the Perkins Multi-Year State Plan.

Criteria for Size

Secondary eligible recipients must offer a minimum of approved Montana Career Pathways based upon student enrollment as follows:

• Large districts (Class AA) must offer three (3) Montana Career Pathways approved by program specialists.

- Medium districts (Class A/B) must offer two (2) Montana Career Pathways approved by program specialists
- Small districts (Class C) must offer one (1) Montana Career Pathway approved by a program specialist

LEAs may offer additional CTE programs beyond the required number of Pathways. If the program meets the requirements of Montana guidelines; it is eligible for Perkins funding.

Postsecondary degree/career programs approved by the Montana Board of Regents or specifically approved by the State are eligible for Perkins funding.

Criteria for Scope

Indications of adequate scope in a Perkins funded secondary CTE program include the requirements for a rigorous Montana Career Pathway (program of study), opportunities for dual credit, online CTE courses, work-based learning, and/or Industry recognized credential opportunities.

Postsecondary programs must include rigorous, coherent CTE content aligned with challenging academic standards culminating in a certificate or degree. Links must exist between the secondary and postsecondary programs of study.

All Perkins funded programs must be aligned with business and industry as validated by a local business advisory committee.

Criteria for Quality

Eligible secondary districts have the minimum number of Montana Career Pathways as determined by their district size, and all CTE funded programs must comply with the Montana CTE requirements and guidelines publication.

Eligible postsecondary recipients offer students the opportunity to participate in programs of study that lead to two of the following three: high-skill, high-wage and/or in-demand occupations. Postsecondary programs must include rigorous, coherent CTE content aligned with challenging academic standards.

Guidance provided to all secondary and postsecondary LEAs on high-skill, high-wage and in-demand are:

- **High-skill – requiring a degree or credential in addition to or beyond a high school diploma.**
- **High-wage – 60% and above the median income per county/city/DLI region/state/etc.**
- **In demand – the Montana Department of Labor argues that all occupations are in demand in Montana.**

II. Required & Permissive Uses

Local Application funds may only be used to meet required and permissive uses, as stated below. Please see **Section IV – Priority Funding** for a list of priority funding areas for the 2024-2025 grant cycle.

Please Note: Perkins funds must be used only to develop, coordinate, implement, or improve career and technical education programs which ***meet the needs identified in the Comprehensive Local Needs Assessment***. LEAs will be required to identify how requested funds will address the results of the CLNA in the local application process. Federal law states you must consult with a diverse body of stakeholders at a "minimum" of representatives of CTE education programs in local agencies (LEA's), secondary and post-secondary teachers and administration, career and academic guidance counselors; school leaders; specialized instruction support staff; State, regional or Local workforce development boards; local or regional business leaders; parents and students; representatives of special populations; representatives of agencies serving out-of-school youth; homeless children and youth, at risk-youth, representatives of Indian tribes and tribal organizations in the State; and any other stakeholder required by the State eligible agency.

Requirements For Local Use of Funds

SEC. 135. LOCAL USES OF FUNDS

(a) GENERAL AUTHORITY.—Each eligible recipient that receives funds under this part shall use such funds to develop, coordinate, implement, or improve career and technical education programs to meet the needs identified in the comprehensive needs assessment described in section 134(c).

(b) REQUIREMENTS FOR USES OF FUNDS.—Funds made available to eligible recipients under this part shall be used to support career and technical education programs that are of sufficient size, scope, and quality to be effective and that—

(1) provide career exploration and career development activities through an organized, systematic framework designed to aid students, including in the middle grades, before enrolling and while participating in a career and technical education program, in making informed plans and decisions about future education and career opportunities and programs of study, which may include—

(A) introductory courses or activities focused on career exploration and career awareness, including non-traditional fields;
(B) readily available career and labor market information, including information on—
(i) occupational supply and demand;
(ii) educational requirements;
(iii) other information on careers aligned to State, local, or Tribal (as applicable) economic priorities; and
(iv) employment sectors;
(C) programs and activities related to the development of student graduation and career plans;
(D) career guidance and academic counselors that provide information on postsecondary education and career options;
(E) any other activity that advances knowledge of career opportunities and assists students in making informed decisions about future education and employment goals, including non-traditional fields; or
(F) providing students with strong experience in, and comprehensive understanding of, all aspects of an industry;

(2) provide professional development for teachers, faculty, school leaders, administrators, specialized instructional support personnel, career guidance and academic counselors, or paraprofessionals, which may include—
(A) professional development on supporting individualized academic and career and technical education instructional approaches, including the integration of academic and career and technical education standards and curricula;
(B) professional development on ensuring labor market information is used to inform the programs, guidance, and advisement offered to students, including information provided under section 15(e)(2)(C) of the Wagner-Peyser Act (29 U.S.C. 49l-2(e)(2)(C));
(C) providing teachers, faculty, school leaders, administrators, specialized instructional support personnel, career guidance and academic counselors, or paraprofessionals, as appropriate, with opportunities to advance knowledge, skills, and understanding of all aspects of an industry, including the latest workplace equipment, technologies, standards, and credentials;
(D) supporting school leaders and administrators in managing career and technical education programs in the schools, institutions, or local educational agencies of such school leaders or administrators;
(E) supporting the implementation of strategies to improve student achievement and close gaps in student participation and performance in career and technical education programs;
(F) providing teachers, faculty, specialized instructional support personnel, career guidance and academic counselors, principals, school leaders, or paraprofessionals, as appropriate, with opportunities to advance knowledge, skills, and understanding in pedagogical practices, including, to the extent the eligible recipient determines that such evidence is reasonably available, evidence-based pedagogical practices;
(G) training teachers, faculty, school leaders, administrators, specialized instructional support personnel, career guidance and academic counselors, or paraprofessionals, as appropriate, to provide appropriate accommodations for

individuals with disabilities, and students with disabilities who are provided accommodations under the Rehabilitation Act of 1973 (29 U.S.C. 701 et seq.) or the Individuals with Disabilities Education Act;
(H) training teachers, faculty, specialized instructional support personnel, career guidance and academic counselors, and paraprofessionals in frameworks to effectively teach students, including a particular focus on students with disabilities and English learners, which may include universal design for learning, multi-tier systems of supports, and positive behavioral interventions and support; or
(I) training for the effective use of community spaces that provide access to tools, technology, and knowledge for learners and entrepreneurs, such as makerspaces or libraries;

(3) provide within career and technical education the skills necessary to pursue careers in high-skill, high-wage, or in-demand industry sectors or occupations;

(4) support integration of academic skills into career and technical education programs and programs of study to support—

(A) CTE participants at the secondary school level in meeting the challenging State academic standards adopted under section 1111(b)(1) of the Elementary and Secondary Education Act of 1965 by the State in which the eligible recipient is located; and
(B) CTE participants at the postsecondary level in achieving academic skills;

(5) plan and carry out elements that support the implementation of career and technical education programs and programs of study and that result in increasing student achievement of the local levels of performance established under section 113, which may include—

(A) a curriculum aligned with the requirements for a program of study;
(B) sustainable relationships among education, business and industry, and other community stakeholders, including industry or sector partnerships in the local area, where applicable, that are designed to facilitate the process of continuously updating and aligning programs of study with skills that are in demand in the State, regional, or local economy, and in collaboration with business outreach staff in one-stop centers, as defined in section 3 of the Workforce Innovation and Opportunity Act (29 U.S.C. 3102), and other appropriate organizations, including community-based and youth-serving organizations;
(C) where appropriate, expanding opportunities for CTE concentrators to participate in accelerated learning programs (as described in section 4104(b)(3)(A)(i)(IV) of the Elementary and Secondary Education Act of 1965 (20 U.S.C. 7114(b)(3)(A)(i)(IV)), including dual or concurrent enrollment programs, early college high schools, and the development or implementation of articulation agreements as part of a career and technical education program of study;
(D) appropriate equipment, technology, and instructional materials (including support for library resources) aligned with business and industry needs, including machinery, testing equipment, tools, implements, hardware and software, and other new and emerging instructional materials;
(E) a continuum of work-based learning opportunities, including simulated work environments;
(F) industry-recognized certification examinations or other assessments leading toward a recognized postsecondary credential;
(G) efforts to recruit and retain career and technical education program teachers, faculty, school leaders, administrators, specialized instructional support personnel, career guidance and academic counselors, and paraprofessionals;
(H) where applicable, coordination with other education and workforce development programs and initiatives, including career pathways and sector partnerships developed under the Workforce Innovation and Opportunity Act (29 U.S.C. 3101 et seq.) and other Federal laws and initiatives that provide students with transition-related services, including the Individuals with Disabilities Education Act;
(I) expanding opportunities for students to participate in distance career and technical education and blended-learning programs;
(J) expanding opportunities for students to participate in competency-based education programs;

(K) improving career guidance and academic counseling programs that assist students in making informed academic and career and technical education decisions, including academic and financial aid counseling;
(L) supporting the integration of employability skills into career and technical education programs and programs of study, including through family and consumer science programs;
(M) supporting programs and activities that increase access, student engagement, and success in science, technology, engineering, and mathematics fields (including computer science and architecture) for students who are members of groups underrepresented in such subject fields;
(N) providing career and technical education, in a school or other educational setting, for adults or out-of-school youth to complete secondary school education or upgrade technical skills;
(O) supporting career and technical student organizations, including student preparation for and participation in technical skills competitions aligned with career and technical education program standards and curricula;
(P) making all forms of instructional content widely available, which may include use of open educational resources;
(Q) supporting the integration of arts and design skills, when appropriate, into career and technical education programs and programs of study;
(R) partnering with a qualified intermediary to improve training, the development of public-private partnerships, systems development, capacity-building, and scalability of the delivery of high-quality career and technical education;
(S) support to reduce or eliminate out-of-pocket expenses for special populations participating in career and technical education, including those participating in dual or concurrent enrollment programs or early college high school programs, and supporting the costs associated with fees, transportation, childcare, or mobility challenges for those special populations; or
(T) other activities to improve career and technical education programs; and

(6) develop and implement evaluations of the activities carried out with funds under this part, including evaluations necessary to complete the comprehensive needs assessment required under section 134(c) and the local report required under section 113(b)(4)(B).

(c) POOLING FUNDS.—An eligible recipient may pool a portion of funds received under this Act with a portion of funds received under this Act available to one or more eligible recipients to support implementation of programs of study through the activities described in subsection(b)(2).

(d) ADMINISTRATIVE COSTS.—Each eligible recipient receiving funds under this part shall not use more than 5 percent of such funds for costs associated with the administration of activities under this section.

III. Accountability & Data

The required postsecondary core indicators of performance for each grant cycle are established by state Perkins staff and the U.S. Department of Education. The purpose of the indicators is to assess the effectiveness of the state Perkins Program, along with its individual institutions, in achieving statewide progress in CTE, and to optimize the return on investment of federal funds in CTE activities.

Accountability Report Card
Prior to awarding federal funds each year, the CTE Data Specialist at OCHE will provide a “Report Card” showing state level performance and performance measurements for each individual college. Factors evaluated will be:

Using the above-mentioned data, the Perkins Program Manager will also determine whether or not specific award conditions/restrictions are necessary. Additional award conditions/restrictions may include:

- Withholding authority for quarterly reimbursement due to inaccurate fiscal supporting documentation
- Withholding authority to proceed with programmatic activities until evidence of acceptable performance is submitted

- Requiring more detailed financial reports, supporting documentation or explanation of expenditures
- Requiring 1:1 technical assistance and more intense involvement of fiscal controllers as well as sub-recipient leadership and management
- Establishment of a prior approval process before budget changes or new expenditures of any kind
- Submission of federally required Time and Effort reports of ALL personnel whose salary is covered by Perkins funds
- Requesting and reviewing minutes taken from CTE Advisory Board Meetings or required CLNA stakeholder consultations (Section 134 (d) Perkins V)

If additional award conditions/restrictions are required, the Perkins Program Manager will notify the College of:

- The reason why the additional conditions/restrictions are being imposed
- The nature of the action needed to remove the conditions/restrictions
- The time allowed for competing the actions and who will be responsible
- The method for requesting reconsideration of conditions/restrictions

Performance Expectations

Each institution is responsible for meeting or exceeding the negotiated performance levels. All projects/programs funded by Perkins must be related to a measurable performance outcome that demonstrates cost effectiveness and is tied directly to one of the following three indicators:

- 1P1 – Postsecondary Retention and Post-Program Placement
- 2P1 – Earned Recognized Postsecondary Credential
- 3P1 – Nontraditional Program Completion

Evaluation methods should be designed to provide feedback regarding progress toward attaining required performance levels. Institutions who do not meet negotiated performance levels will be required to submit a local improvement plan along with the following year's Perkins application.

Indicator Guidance and Definitions

The text below provides information relative to how students are counted for the purposes of Perkins, along with the definitions of indicators and accountability measures.

Postsecondary CTE Participant: A postsecondary/adult student who has earned one or more credits in any CTE program area.

Postsecondary CTE Concentrator: A postsecondary/adult student who: (1) completes at least 12 academic or CTE credits within a single program area sequence that is comprised of 12 or more academic and technical credits and terminates in the award of an industry recognized credential, a certificate, or a degree; or (2) completes a short term CTE program sequence of less than 12 credit units that terminates in an industry-recognized credential, a certificate, or a degree.

1P1: Postsecondary Retention and Post-Program Placement

- Numerator: the number of CTE concentrators who, during the second quarter after program completion, remain enrolled in postsecondary education, are in advanced training, military service, or a service program that receives assistance under title I of the National and Community Service Act of 1990 (42 U.S.C. 12511 et seq.), are volunteers as described in section 5(a) of the Peace Corps Act (22 U.S.C 2504(a)), or are placed or retained in employment.
- Denominator: the number of CTE concentrators who completed their program in the prior reporting year.

2P1: Earned Recognized Postsecondary Credential

- Numerator: the number of CTE concentrators who obtained a diploma, certificate, or credential during participation in or within one year of program completion.
- Denominator: the number of CTE concentrators who left postsecondary during the prior reporting year.

3P1: Nontraditional Program Completion

- Numerator: the number of CTE concentrators, from underrepresented gender groups, in career and technical education programs and programs of study that lead to non-traditional fields.
- Denominator: the number of CTE concentrators in a CTE program or program of study that leads to a nontraditional field during the reporting year.

Disaggregated Data Categories

The categories below are those identified by the U.S. Department of Education.

- Gender
- Race and Ethnicity
- Special Populations:
    - individuals with disabilities;
    - individuals from economically disadvantaged families, including low-income youth and adults;
    - individuals preparing for non-traditional fields;
    - single parents, including single pregnant women;
    - out-of-workforce individuals;
    - English learners;
    - homeless individuals described in section 725 of the McKinney-Vento Homeless Assistance Act (42 U.S.C. 11434a);
    - youth who are in, or have aged out of, the foster care system; and
    - youth with a parent who -
        - is a member of the armed forces (as such term is defined in section 101 (a)(4) of title 10, United States Code); and
        - is on active duty (as such term is defined in section 101(d)(1) of such title).

Data Collection

All data files must be submitted to the CTE Data Specialist at OCHE by November 1. cstahl@montana.edu

IV. Local Application

Accessing the Local Application

The postsecondary Perkins Local Application can be accessed online in the Campus Folder.

Application Content

The Local Application will be completed online in the Campus Folder and will cover a variety of institutional information, including Contact Information, Project Justification, Budget Narratives, allowable and non-allowable costs, Amendments, and Improvement Plans (if requested by OCHE). If you have questions about programmatic details within the application, please contact the Perkins Program Manager. mlrutherford@montana.edu

Project Justification
Must include (1) a specific description of project activities and (2) clear project budget details demonstrating math. Explain how the project relates to the activities outlined in the results of the CLNA.

Budget Narrative
Budget details MUST match budget template line items in affiliated Project Justification. Make sure to address all fiscal aspects of a project. A budget narrative explains ALL the estimated costs for a Project Justification including specific details including how mathematical calculations were derived. ****Tip**** make sure to double check that you have included all the monetary/fiscal components from a Project Justification into the Budget Narrative.

Comprehensive Local Needs Assessment
In each Project Summary section, please identify how the expense is justified by results of your CLNA. You must use results from your 2023-2024 CLNA and attach it to your application in the CLNA section in the Campus Folder.

EXAMPLE: Please identify the results from your Comprehensive Local Needs Assessment that are addressed by this project, program or purchase (include specific data and how this project, program or purchases addresses the identified need):
1. Advisory board feedback that the program needs additional supplies. 2. US Bureau of Labor Statics O'NET says that "Employment of chefs and head cooks is projected to grow 11 percent from 2018 to 2028, much faster than the average for all occupations. Most job opportunities for chefs and head cooks are expected to be in food services, including restaurants. Job opportunities will result from growth and from the need to replace workers who leave the occupation." 3. MT projections indicate a 12.5% increase in jobs in this field. 4. According to the provided data portal, chefs and head cooks make over $45K, which is considered high-wage, if going by the 60% of median

LEAs should keep backup documentation related to the CLNA (consultations with federally required stakeholders Section 134(2)(d), documentation of attendees, Advisory Committee minutes, etc.). These do not need to be submitted with the grant application but may be requested by OCHE at any time during the Tier II Monitoring process.

Funding Distribution
Line-item budget narrative descriptions should be as detailed as possible. Please provide relative dates, locations, and names if applicable. When developing the budget please include the following information in your narrative. See Budget Narrative descriptions in the Campus Folder for guidance. When developing your Project Justifications and Budget Narratives think about answering "who, what, when, where, why and how" for the entire project.

Amendments
Once approved, you may access your current application and complete the amendment online in the Campus Folder.

After the local application and budget is approved and the grant cycle is underway, there may be need to submit an amendment.

Any one of the following criteria necessitate submitting an amendment:

- an adjustment to spending greater than 10% of the sub-total for the major budget category (such as Salaries or Travel),
- reallocating funding to a new project, or a change in the scope of objectives of programmatic goals
- A 25% reduction in time devoted by the Perkins Coordinator or a change of any key persons specified in the grant application
- there has been a change to the type of equipment identified for a project.

Please allow 2 weeks for Amendment approval and plan accordingly for expenditures.

Application/Amendment Submission
Please submit your application and amendments online to the Campus Folder. Please contact the Perkins Program Manager for assistance and questions. mlrutherford@montana.edu

V. Reports

There are several types of reports that are required throughout the Perkins grant cycle. Fiscal and program report forms can be found at: http://mus.edu/Perkins/grant_apps.html.

Reports include:

- Quarterly Reports: Recipients will be asked to summarize the projects/programs and report the final outcomes as they relate to accountability measures used to assess progress in meeting negotiated performance levels. Quarterly reports are completed in the Campus Folder as Performance Plan Narratives.

- Fiscal Reports. Fiscal report forms can be found at: http://www.mus.edu/Perkins/grant_apps.html. Fiscal reports are due to the Federal Fiscal Accountant (afillinger@montana.edu) 30 days after the end of each *quarter*. Final quarterly fiscal reports for the grant period ending June 30 are due prior to Aug. 31.

Equipment Inventory. All capitalized (formerly Major Equipment) purchases should be made prior to the beginning of the 3rd Quarter (January 1). Any capitalized (formerly Major Equipment) purchases after Jan 31 require OCHE permission. Requests to purchase equipment beyond this date will be considered on a case-by-case basis. Equipment Inventory forms, along with copies of equipment invoices/paid receipts should be provided to the Federal Fiscal Accountant (afillinger@montana.edu) no later than January 31 with either the corresponding Q1 or Q2 Fiscal Report.

When purchasing and disposing of equipment with federal funds, please refer to and ensure compliance with the regulations in EDGAR, Part 80.32 and 2 CFR 200 UGG guidelines. When there is no longer a need for a specific piece of equipment to accomplish the purpose of the career and technical education program, or if the equipment becomes worn out or obsolete, please contact the Perkins Program Manager or accountant, Angie Fillinger, afillinger@montana.edu.

VI. Monitoring

The Postsecondary Montana Perkins Program is responsible for monitoring and evaluating the effectiveness of local application programs. Perkins staff at OCHE will conduct regular program reviews and audits to ensure accuracy and compliance. Perkins V monitoring may include Tier 1 review of quarterly fiscal reports and supporting fiscal documentation, Tier II Desk Audits, and Tier III On-Site Visits.

An institution selected for Tier II or Tier III monitoring will be notified at least one month in advance. This notification may include an agenda and any documents required to be available for the review. A summary of the monitoring visit will be prepared for the institution no later than 30 days following the review, and may cover findings, action steps required, areas for improvement, and best practices noted.

100% of all Perkins V sub-awardees will have a Tier 1 Quarterly Monitoring throughout the fiscal year with the submission of the Quarterly and Financial Fiscal Reports.

Every Fiscal Reporting Quarter the Perkins Program Manager and Fiscal Federal Accountant will conduct reviews of each subrecipients' Perkins V Quarterly Program and Financial Fiscal reports as well as supporting documentation.

The following criteria are reviewed for monitoring (this list is not exhaustive).

FISCAL REPORTS:

- Quarterly fiscal report and supporting documents are submitted prior to stated deadlines
- Fiscal report matches the most current approved Budget and Amendment
- Supporting financial documentation and receipts are appropriate and accurate
- Controller provides adequate internal financial controls and understands proper use of Perkins V funding
- Perkins V Grant Program Coordinator position has been consistently maintained and understands proper use of Perkins V funding
- All expenditures are allowable
- Major Equipment purchases are made prior to Jan 31. OCHE approval is sought when situations arise where purchases might need to be made outside of this window
- Expenditures from Quarter 4 Final Fiscal Report were pre-approved on the Final Amendment
- History of Quarter 4 Final Fiscal Report generally matches the Final Amendment without numerous differences

QUATERLY PROGRAM REPORTS:

- Quarterly Program Performance Plan Narrative Reports are submitted with all questions completed thoroughly **AND** prior to deadlines.
    - **Quarter 1-Due October 31**
    - **Quarter 2-Due January 31**
    - **Quarter 3-Due April 30**
    - **Quarter 4 (Final Report)-due August 31**

OTHER CRITERIA:

- Perkins V Grant Program Coordinator attends monthly webinars/Perkins Coordinator Check-In conference calls
- Amount of unspent grant funds
- Progress on Perkins Improvement Plans for Performance Indicators
- Staff turnover

On-going concerns with the criteria listed above could lead to a Tier II Desk Audit.

VII. Timeline

Below is a DRAFT timeline of a typical Perkins grant cycle, which runs from July 1 through June 30. Contents/dates are subject to change.

January 31
Q2 Fiscal and Performance Plan Narratives Reports due

April 30
Q3 Fiscal and Performance Plan Narratives Reports due

May 1
Final Budget Amendment Deadline

Mid-May
Perkins Local + CLNA and Perkins Reserve Applications due

July 1
Fiscal Year Grant Cycle begins

August 31
Q4 Final Fiscal and Performance Plan Narratives Reports due

October 31
Q1 Fiscal and Performance Plan Narratives Reports due

November 1
Perkins performance and student data due to OCHE CTE Data Specialist

December 31
Deadline for ordering Capitalized Equipment (formerly Major Equipment)

VIII. Methods of Administration/Civil Rights

The U.S. Department of Education, Office for Civil Rights (OCR), requires the OCHE to conduct site visits as part of its Vocational Education Methods of Administration civil rights compliance of campuses that receive federal funding for two-year CTE programs. On-site reviews are based on U.S. Department of Education regulations implementing Title VI (34 CFR, Part 100), Title IX (34 CFR, Part 106), Section 504 (34 CFR, Part 104), and the Department of Justice regulations implementing Title II of the Americans with Disabilities Act (ADA) (28 CFR, Part 35), as well as the Guidelines for Eliminating Discrimination and Denial of Services on the Basis of Race, Color, National Origin, Sex and Disability in Vocational Education Programs (34 CFR, Part 100, Appendix B).

Further information on this topic can be found at http://mus.edu/OCR/index.html. Questions can be referred to Perkins Equity & Compliance Manager and MOA State Coordinator Ciera Mead Franks-Ongoy at cfranksongoy@montana.ed.

APPENDIX 1 – Travel

STATE EMPLOYEE TRAVEL INFORMATION

Per Diem Rates Effective 10/01/23 through 9/30/24

	In-State	Out-of-State	Foreign
Morning Meal 12:01 am – 10:00 am	$8.25	$13	$13
Midday Meal 10:01 am – 3:00 pm	$9.25	$15	$15
Evening Meal 3:01 pm – midnight	$16.00	$26	$26
Total per day	$33.50	$54	$54

Must be in travel status–at least 15 miles away from your headquarters or work site for the day–for **MORE THAN 3 hours (<u>a minimum of one minute over three hours</u>)** during the mealtime range to qualify for that meal allowance. This means leaving no later than 6:59 am for a morning meal and not returning any earlier than 6:02 pm for the evening meal. (You must count your minutes and be VERY SPECIFIC about recording the start and finish of your travel shift.

References: 2-18-501, 2-18-502, MCA; Employee Travel Policy; GSA website for Out-of-State and Foreign meals at standard rate.

Lodging Rates Effective 10/01/23 through 9/30/24

	In- and Out-of-State Rates
Standard Rate	$107
High-Cost Rate	See GSA website for rates
	Foreign Lodging Rates
Foreign	See US Department of State website for rates

NOTE: The following counties are considered high-cost and vary in their allowed standard rate: *Flathead*, *Gallatin*, *Park*, *Lewis and Clark*, and *Missoula*.

Rates exceeding either standard or high-cost rates require preapproval.

References: 2-18-501, MCA; Employee Travel Policy

Personal Vehicle Mileage Reimbursements Effective 1/1/24 through 12/31/24

	Rate per Mile	Notes
Standard Rate	32.3 cents	No maximum mileage per month
High Rate*	67.0 cents	0 <= 1000 miles per month
Low Rate*	64.0 cents	>1000 miles per month

*Must meet certain requirements to qualify for high/low rates.

References: 2-18-503, MCA; Employee Travel Policy

Preapproval by department director or designee is required for:

- Out-of-State Travel
- Lodging at Actual Cost
- Personal Vehicle Usage
- Foreign Travel

Questions about travel? Email: travelhelpdesk@mt.gov