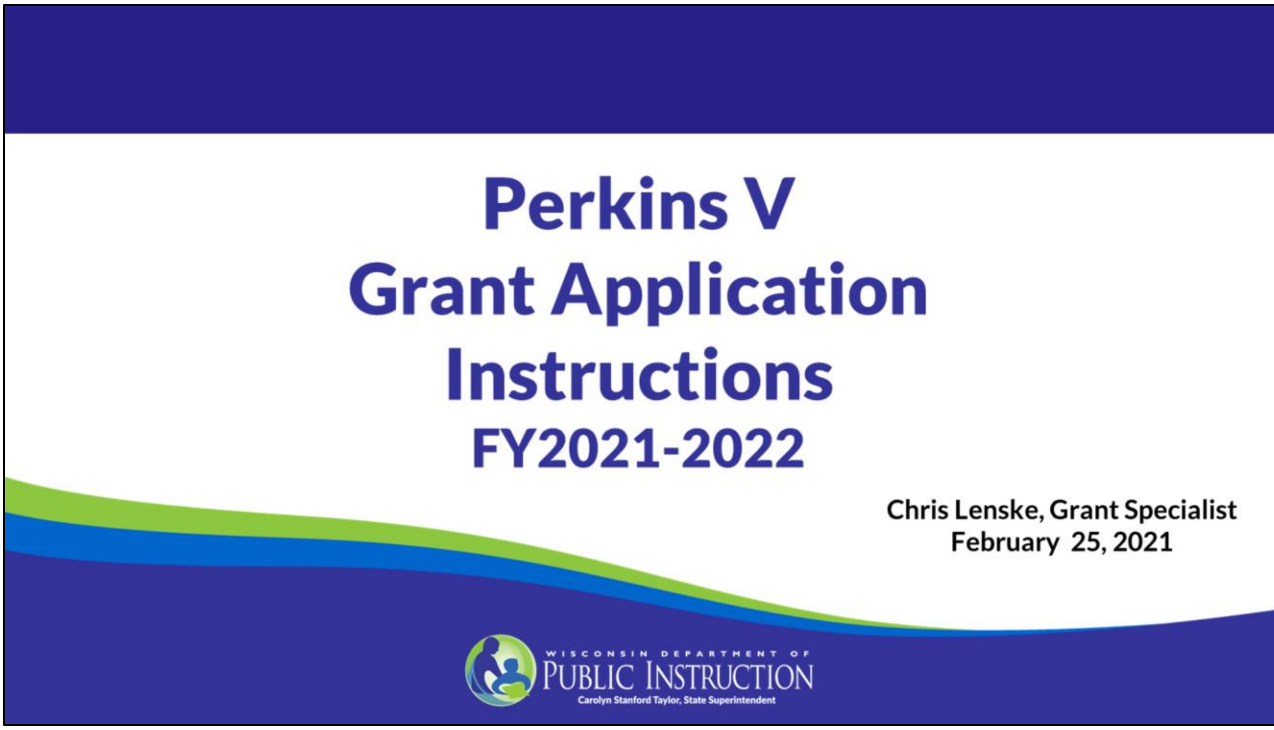


Hello, good afternoon everyone. Welcome to this overview of the Perkins V Grant application instructions. My name is Chris Lenske and as most of you know, I'm the grant specialist on the CTE team at DPI.

We have everyone's microphones muted, but feel free to enter your questions in the chat or raise your hand as we go along with today's presentation. Also, so that you are aware, we are recording this presentation for those who wish to view it at a later time.

We have a lot to cover, so we'll get right to it...

This presentation will walk you through the application instructions, which will

- introduce you to the new instructions document;
- guide your understanding of what will be required in the application
- further inform your understanding of the career pathways size, scope, and quality required elements and
- guide your budget planning

Again, as we go through the presentation today, feel free to put clarifying questions that you have into the chat, and we'll address them at certain points in the presentation.

The draft instructions have been posted to the Perkins application webpage. (You can pull that up if you'd like to view it as we go.)

[Pull up draft copy of instructions.] https://dpi.wi.gov/cte/carl-perkins/grants/formula-grants

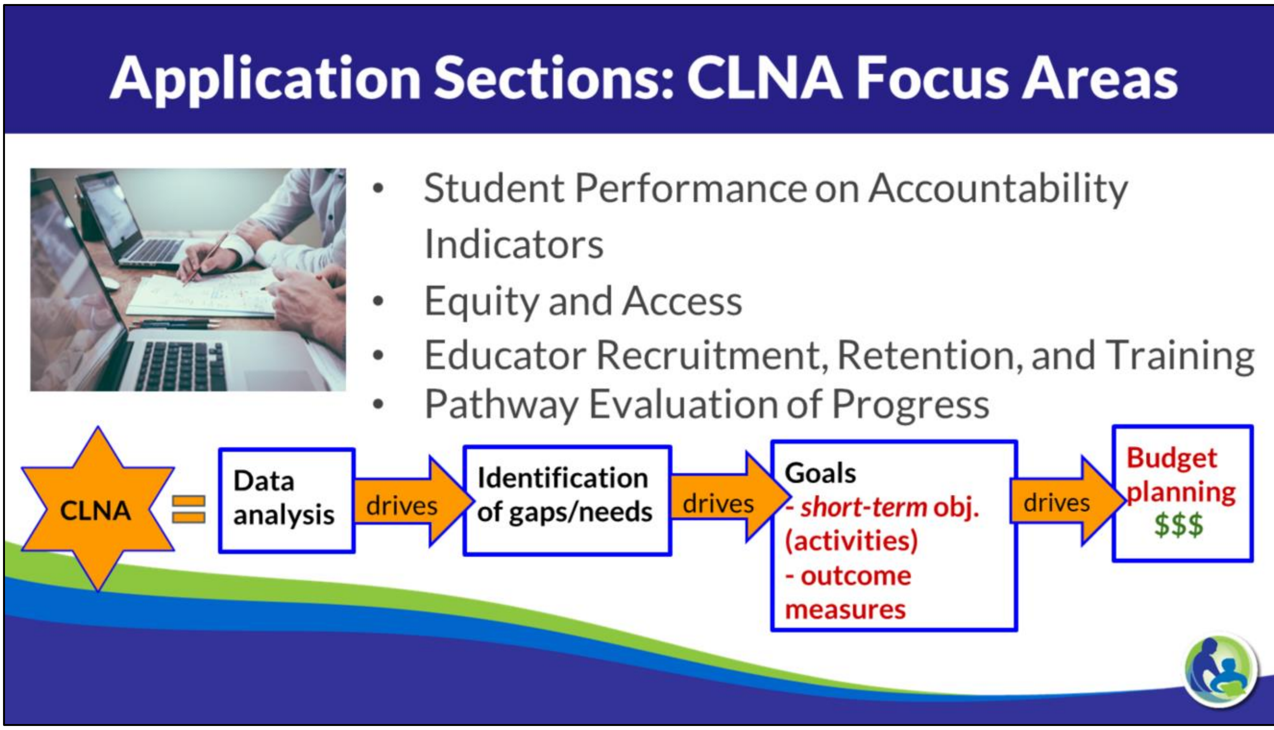
Here is the grant information and instructions for this year. We drafted a very comprehensive document so there is a lot of information in one place, including Perkins eligibility and other high-level information that we covered in our previous presentations over the last month.

[Scroll past introductory information]

So, I'll scroll through that information [**STOP at the focus areas].**

- We have a nice section explaining the CLNA focus areas in detail. It breaks each one down with an example of a gap, goal, outcome measure, and budget line items for you to reference.

- Let's look at the first one: **student performance on accountability indicators**…



<come back to slides>

The Comprehensive Local Needs Assessment Results drive Goals drive Objectives/Activities, which drive your Spending.

You'll recall from past discussions that your CLNA results and goals are in place for a two-year period. So, your CLNA from a year ago will continue to be your driver of program priorities, activities and spending needs into the next grant year.

Your application for this year will communicate the activities targeted to mitigate your gaps, and specify purchases where Perkins funds will be used for those activities. As we've said in the past, your application is, essentially, a strategic plan for addressing the gaps through your budget.

(It is not determining what you want to buy and then retrofitting those purchases to your CLNA results.)

As we discussed last time, **focus area objectives (or activities)** will copy over from last year's application's "long-term objectives" and will now become your "short-term objectives (activities)." The RED on the slide indicates the editable fields in your application.

Application - Focus Areas

Long-term Objectives (activities) → Short-term.

Options:

- Keep as is
- Delete

Edit via drop-down menu options or "Other" (fill-in)

Funding - Perkins Yes/No

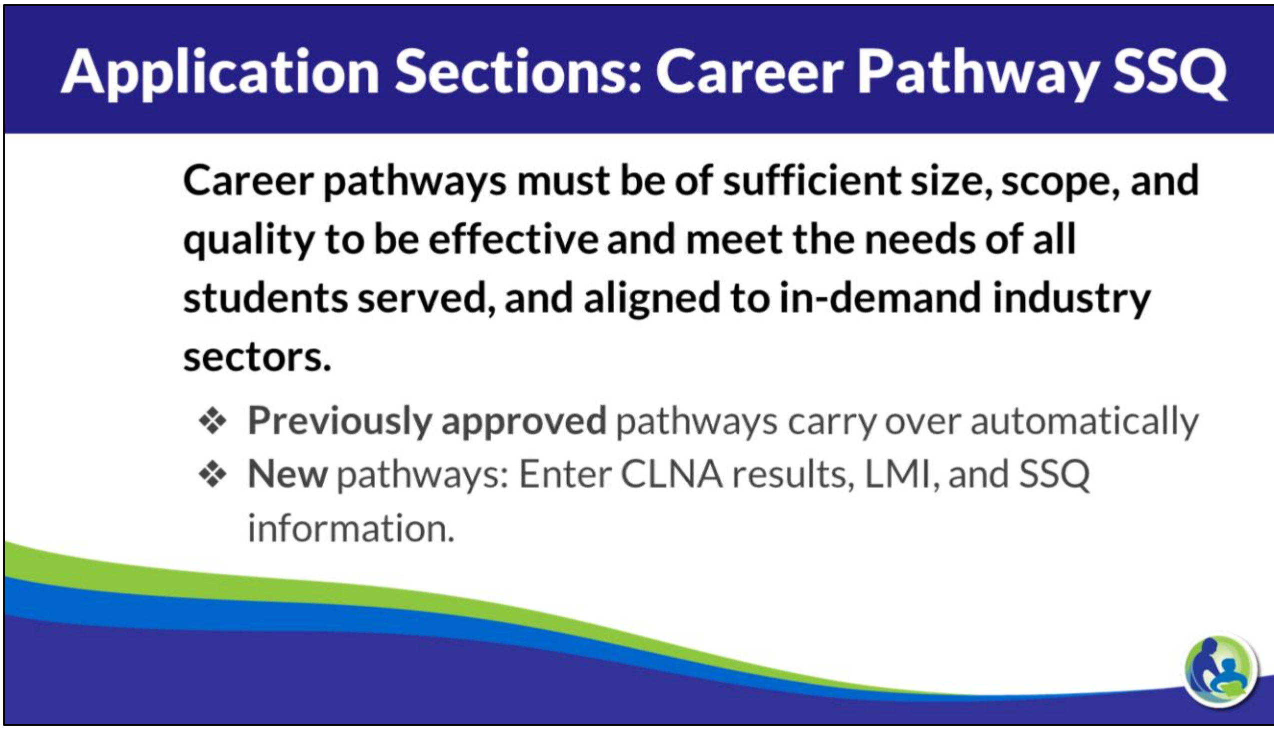
Goal outcome measure

So, you may keep the objective as copied over. Or, update an objective by deleting it and selecting a new one from the drop-down menu that best aligns with the CLNA goal. OR select "other" from the drop-down menu, which allows you to key in your own objective.

Then as you did last year, you'll select "yes" or "no" as to whether or not Perkins funds will be used for that activity. When is "yes" is selected, the objective will pre-fill into the budget section drop-down menu for you. If you indicate NO, meaning you will be using other local resources, the objective will not prefill to the budget.

Finally, enter the outcome measures that will be used to evaluate improvement toward the goal.

Last year, there were a number of areas where objectives weren't appropriate to the focus area, so we anticipate there will be a number of edits to the objectives this year to better align your activities and that is okay.



Related to career pathways SSQ: What is the purpose of this information? It's to ensure that pathways are of sufficient size, scope, and quality to be effective and meet the needs of all students served and are ultimately aligned to in-demand industry sectors.

The career pathways for which you were approved last year will pre-fill into this year's application. As with the other focus areas, the objectives and outcome measures will be editable. You will **not** be able to edit the SSQ information.

That being said, **IF** you wish to have a new career pathway submitted for approval, you will enter the CLNA results for that new pathway as well as the LMI and SSQ information, just as you did last year.

This section begins on page 7 of the draft guide.

Application
Pathway Evaluation of Progress

Size, Scope, and Quality Elements (3 out of 5)

- ➢Sequence of courses (required)
- ➢Work-based learning (optional)
- ➢Industry-recognized credential (optional)
- ➢College credit (optional)

Resources:

- Appendix A: Size, Scope, and Quality
- **Perkins FAQ:** https://dpi.wi.gov/cte/carl-perkins/perkins-v/frequently-asked-questions

While there probably won't be many new pathways entered for review as this year, for those that are, I want to review the information that must be submitted as evidence that your pathway meets size, scope, and quality elements.

Appendix A on the application website, provides a lot of detail to help you understand what qualifies for size, scope, and quality and what needs to be submitted to show that the element meets the requirements. The Perkins FAQ also provides examples and additional details as to what does and does not meet the bar. Be mindful that what you enter matters.

While consortia fiscal agents do **not** have to submit evidence as part of your application, records of your member districts must be kept for auditing or monitoring purposes.

Career Pathway SSQ - Sequence of Courses (required)

Components of SSQ	What it includes	Evidence of SSQ to be provided in application
Sequence of courses (required): At least two high school CTE courses in a sequence are offered.	At least two high school CTE courses in a sequence are offered as part of the pathway. <u>Quality</u>: Course progression; curriculum aligned to workforce; rigor; alignment to standards.	List courses that meet the requirements of this element for the pathway: Include the courses (by **name)** in sequence from introductory to more advanced.

So let’s take a look at the sequence of courses, which is required. This means at least two high school CTE courses are offered to students in a sequence from introductory to a more advanced level course or courses.

○ The length of the courses are equivalent to a semester or longer, and taught by appropriately licensed CTE teachers or higher education faculty.

○ Further, the curricula align with local workforce needs, are rigorous, and align to state academic and CTE standards.

The column all the way to the right (as it is laid out in Appendix A), tells you what must be included in the application or in the case of a consortium, kept for your records.

So, the course name needs to be provided and listed <u>in the sequence</u> starting with the introductory course and a second (or third) more advanced course.

Career Pathway SSQ - Work-based Learning (optional)

Components of SSQ	What it includes	Evidence of SSQ to be provided in application
Work-based learning (WBL) options At least one WBL opportunity within the pathway is offered.	Work-based learning options may be either **state-certified** programs or **local programs** that meet the Perkins V definition of WBL . WBL encompasses specific characteristics as outlined in Appendix A.	Provide information of the WBL experience connected to the pathway. • The WBL name and course guide description that aligns with the sequence of courses, • The type of WBL experience offered and • If it is in-school or out-of-school

Work-based learning options within the pathway may be either state-certified programs or local programs that meet the Perkins V definition of WBL, which requires

1. Sustained interaction with an industry or professionals,
2. Is situated in a real workplace setting, or simulates such an environment,
3. Fosters in-depth, firsthand engagement with the tasks required in the career field and
4. Aligns with curriculum and instruction.

What you must provide in your application, is the type (or name) of the WBL experience offered along with the course guide description such as:

a. Supervised occupational experiences
b. School-based enterprises,
c. Simulated worksites
e. Internship/local co-op or
f. State-certified Youth Apprenticeship that is aligned to the curriculum and pathway and named.

Then include if the opportunity offered is an in-school or out-of-school opportunity.

Career Pathway SSQ - Industry-recognized credentials (optional)

Components of SSQ	What it includes	Evidence of SSQ to be provided in application
Industry-recognized credentials (IRC) At least one IRC opportunity is offered.	Accepted IRCs are those that are: ● essential to the pathway, and ● recognizable by employers in the region.	List appropriate IRCs for the pathway. ● List the name(s) of the current IRC(s) available for students within the pathway.

Industry-recognized credentials (IRC)

If you use this as one of your three elements, you must offer at least one IRC directly connected to or required for employment.
● List the name(s) of the current IRC(s) available for students within the pathway. These are credentials that you assist your students in obtaining while still in high school.

We saw some confusion here, which led to corrections that had to be made prior to approval.

Please note that an IRC does not need to be on the CTE Incentive Grant reimbursement list. That list is for an entirely different purpose. In fact, some on those IRCs on the list do not meet SSQ requirements, so would not count as 1 of the 3. For example, State skill standards Co-op, YA do not count as IRCs for the purpose of SSQ requirements. (Those are WBL.)

Career Pathway SSQ - Dual Credit (optional)

Components of SSQ	What it includes	Evidence of SSQ to be provided in application
At least one dual credit opportunity is offered.	Dual or concurrent enrollment programs, such as: ● Advanced standing (including AP when appropriate) ● Start College Now ● Early College Credit ● Transcripted credit	List college credit opportunities, including dual or concurrent credit options. This could include AP courses if aligned to the pathway. ● List the name(s) of courses and ● The IHE that provides the credit

For college credit, at least one dual credit opportunity within the pathway is offered (not just any dual credit that district students may have taken).
So, as evidence you need to provide:

- The name of the course aligned with the pathway for which students are currently able to gain college credit and are listed in your course guide. General elective dual credit courses, while valuable, do NOT count for SSQ in a pathway and the
- The name of the institution of higher education that provides the credit for the pathway-related major or degree

So, to determine if a course is applicable, ask yourself, "*will the dual credit course only fulfill a general education requirement, or will it meet an academic requirement for a major or degree related to the pathway?"*

The bottom line is that it must be a course that gives students a head start in the postsecondary segment of their career pathway.

[This includes CTE and non-CTE courses as long as the college credit earned is specific to the career pathway and counts for credit in that postsecondary program.]

Career Pathway SSQ - CTSOs

Components of SSQ	What it includes	Evidence of SSQ to be provided in application
A CTSO is offered that provides leadership and competitive activities that align with the career pathway.	A CTSO is defined as "an organization for individuals enrolled in a CTE program that engages in activities as an integral part of the instructional program."	List active CTSOs and include activities. ● List the CTSO that aligns with the sequence of courses for the pathway. ● List the opportunities for leadership and/or competitive activities (minimum of two)

In order for a CTSO to meet one of the SSQ elements, the activities students engage in must be an integral part of the instructional program. The CTSO identified must align with the career pathway sequence of courses and be taught/advised by a CTE-licensed instructor within the career pathway.

As evidence of this element, you are required to:

● List the appropriate CTSO available that aligns with the sequence of courses for the career pathway.

● List the opportunities for leadership and/or competitive activities (minimum of two) related to the pathway. This means that the name of an activity is provided, such as CTSO Government Day or car wash fundraiser, Fall Leadership Conference or participation in a regional competition or state competition.

Only CTSOs as defined in Perkins and the state of Wisconsin qualify as an integral, intracurricular part of a career pathway.

The CTSOs that meet Wisconsin's-approved bar are DECA, FBLA, FCCLA, FFA, HOSA, SkillsUSA

Any questions about SSQ?

[Applicants who will have a new CTSO available for students in the coming year:

- Indicate the charter date
- Provide the local advisor name and email.]

Application

Pre-Application Tasks

A. Complete the Perkins grant CTEC Contact Form (not in WISEgrants).

- The Google form can be found on the DPI Perkins Application webpage.
- When an FA serves as the lead for a consortium, the district designee (DD) contact information spreadsheet must also be uploaded to the form.

B. Obtain access to the WISEgrants portal.

- WAMS ID: To register, users should use a work email connected to their WAMS account. ("A Quick-Start Guide")
- Access to the system is granted by the agency System Administrator.

[Need 20m]
Now for the nuts and bolts of the application.

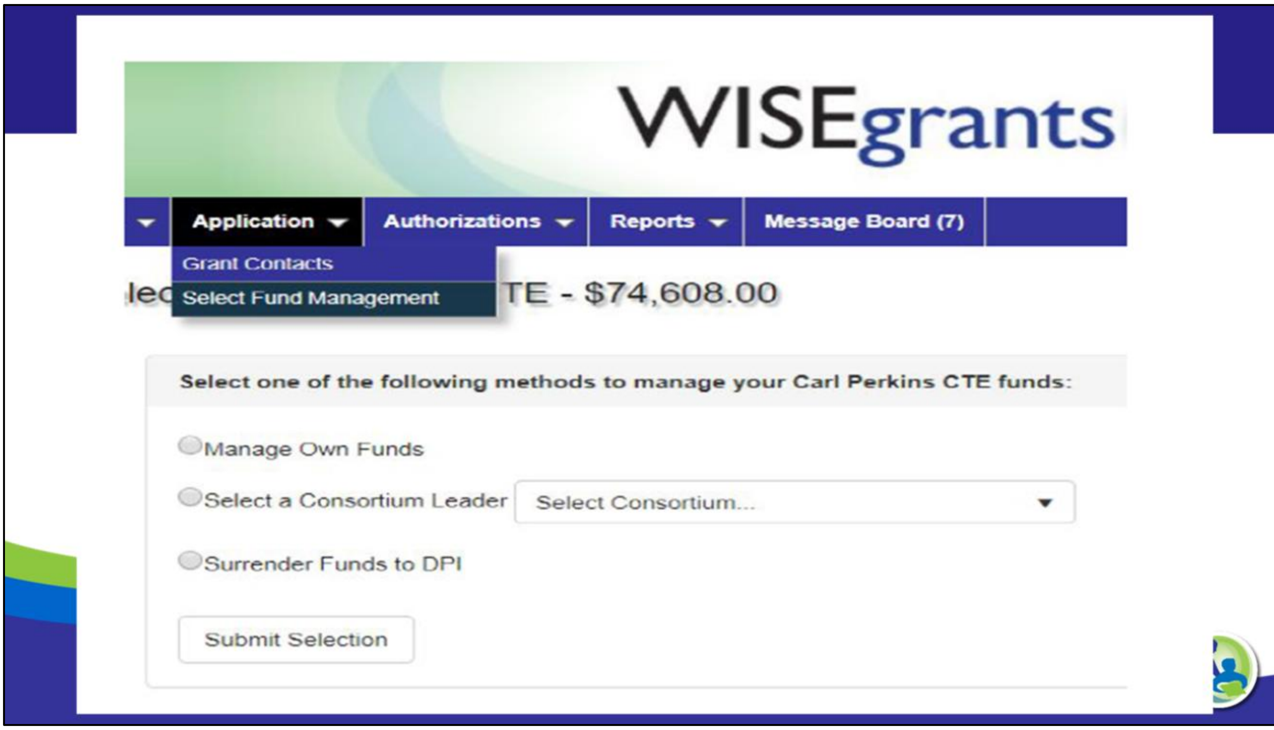
Once the WISEgrants system functionality is developed, we'll walk through a demonstration of the portal, but for now, we'll address some of the steps.

Again, I want to call your attention to the pre-application tasks. These are things that have to be done before you can actually access your application.

First is the contact form. This will be found on the DPI Perkins Application webpage by Monday. The form must include the contact information for the CTEC at your agency and the status of your CTEC license [when it expires].

When an FA serves as the lead for a consortium, the member district designee contact information spreadsheet must also be completed and uploaded to the contacts form. Do not submit your form until the district designee information is fully completed and uploaded.

Then access to the WISEgrants portal must be obtained by anyone who works in the system. Anyone who had access last year will automatically have access this year.



The last pre-application task is the Fund Management Selection and forms signed by your District Authorizer. Here is a screenshot of what that fund management page looks like in the system. The LEA Authorizer (that is, the person designated to make funding decisions on behalf of the district) must select one of the options on behalf of the district:

a) Manage own funds (single agency applicant - see Perkins grant eligibility),

b) Join a consortium (this means that the consortium FA is the applicant), or

c) Surrender allocated funds to DPI.

Once completed, and the required *Assurances* documents signed by the Authorizer, agreeing to fulfill all requirements, you will be able to access the application. Those documents are found under the tab “Authorizations” at the top.

If “join a consortium” is selected, the member district authorizer must additionally sign the *Verification* document confirming that the LEA is joining the consortium selected.

Consortium member agencies do have to go in and complete this process every year. It doesn’t automatically carry over from one year to the next. Due to the two-year CLNA process that is tied to the application, agencies should be completing this in the same way that they did last year.

Once in the application, you will see the following links for the sections of the application. This is where you'll go to enter information.

- The Comprehensive Local Needs Assessment,
- Perkins Pathways
- The narrative section can be accessed to view only.
- And the Budget.

Application: Budget

Budget Categories

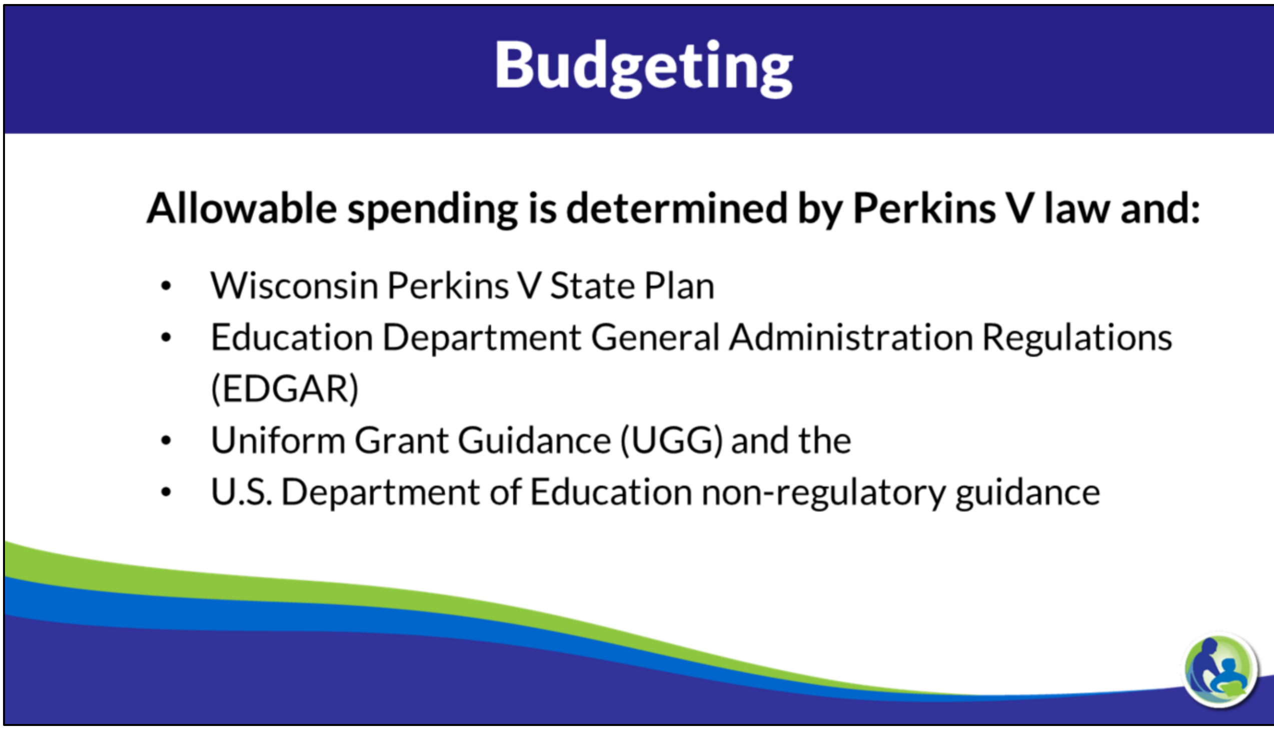
- Personnel
- Purchase services
- Non-capital objects
- Capital objects
- Other objects

Budget Types

- Administration
- CTE program

In terms of the budget, everything purchased falls into one of these budget categories and types. We covered what each of these means in our last webcast.

In the instructions document, we've included considerations for expenses and common purchase requests (both allowed and not allowed), that will help you make decisions about your purchases.

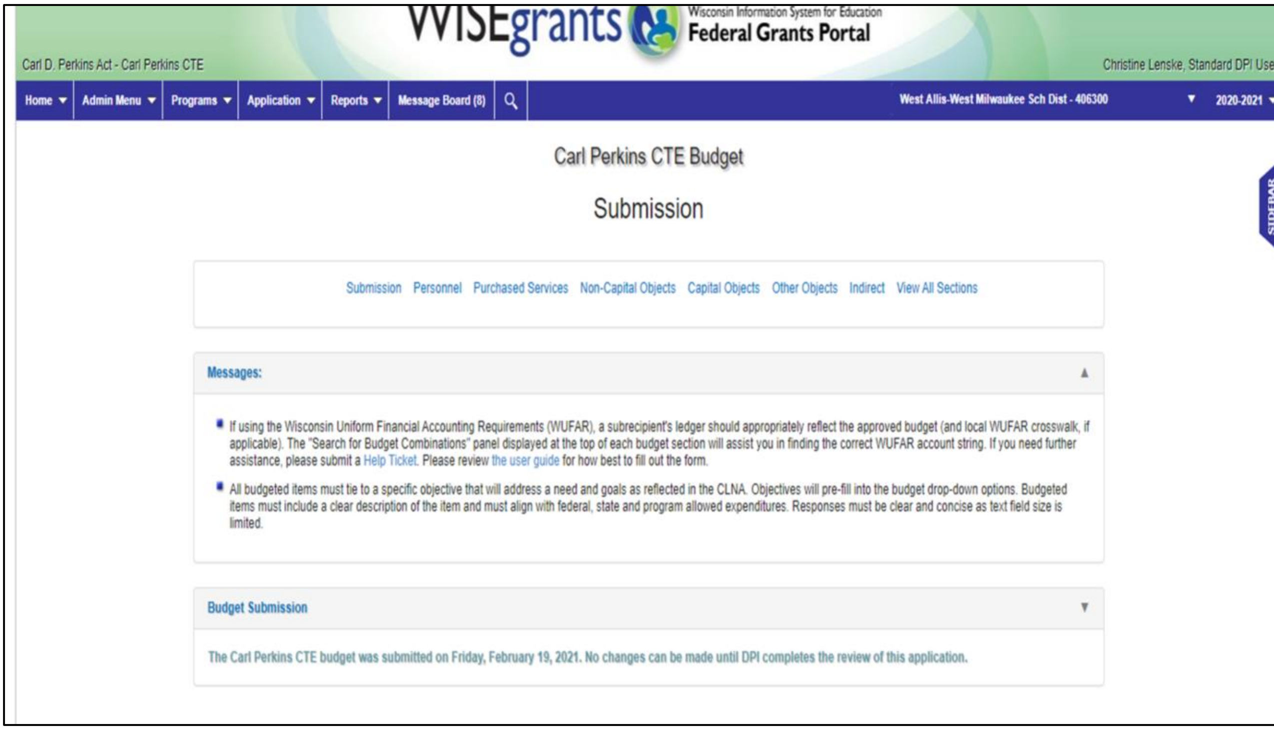


In addition to the Act, allowable spending is determined by a number of rules.

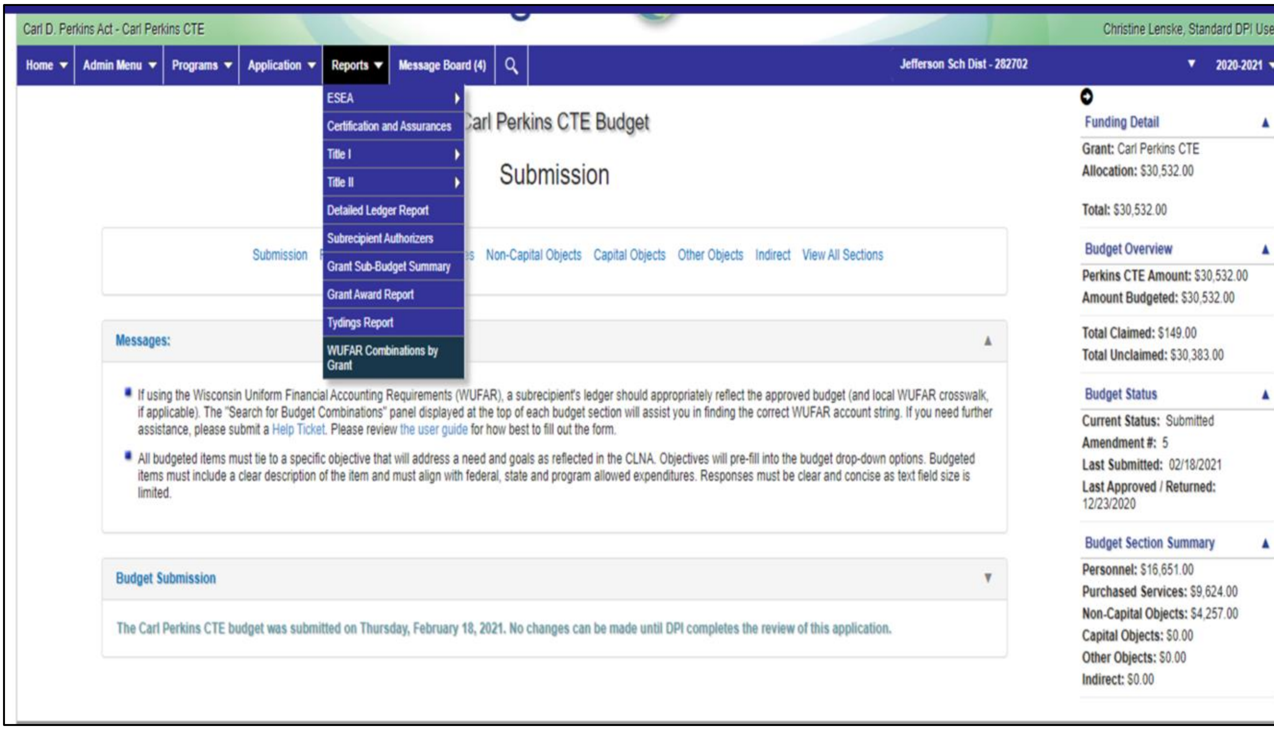
In short, while a purchase may seem to be in line with the Perkins act, it may not be in line with other federal or local spending rules, so a good rule of thumb is to check with your business office.

We talked a lot about budgeting in the last webcast. So, if you haven’t yet, be sure to view that.

Today we’ll focus a bit more on the budget instructions and functionality of the WISEgrants system.



This is what the budget page looks like. Listed, under Perkins budget **submission**, you can see the categories for which you'll enter budget items: Personnel, Purchased Services, Non-cap and Cap Objects, and Other.

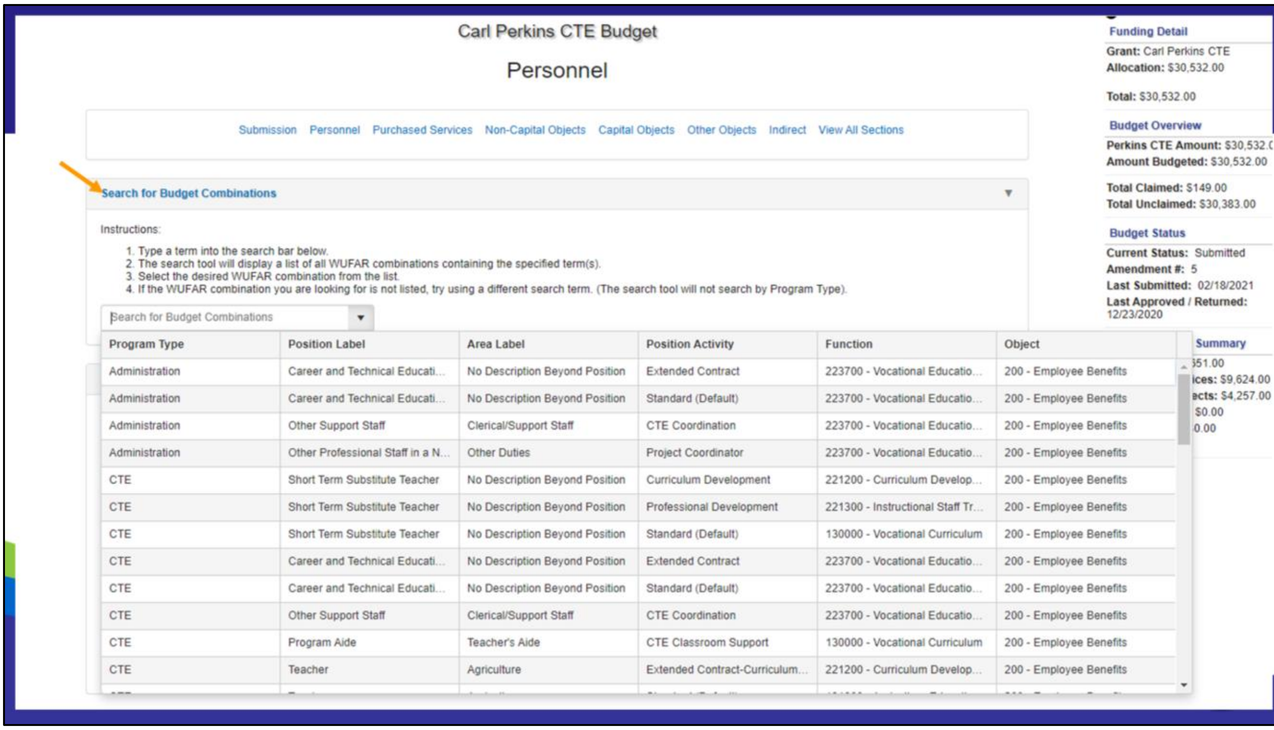


WUFAR, or the Wisconsin Uniform Financial Accounting Requirements, is used for coding line items.

Common codes for the Perkins grant can be pulled down from the reports tab.

To the right, is the side bar which shows your allocation, the amount budgeted, claimed and not yet claimed, and the current status of approval.

One thing we get asked about is if Perkins allows recipients to carry over funds. Perkins, unlike other federal grants, does not have a carryover provision for grant recipients. So, whatever is not used, comes back to DPI, is put through the allocation formula, and allocated to all districts as part of the final allocation the next year.



Carl Perkins CTE Budget

Personnel

Submission Personnel Purchased Services Non-Capital Objects Capital Objects Other Objects Indirect View All Sections

Search for Budget Combinations

Instructions:

1. Type a term into the search bar below.
2. The search tool will display a list of all WUFAR combinations containing the specified term(s).
3. Select the desired WUFAR combination from the list.
4. If the WUFAR combination you are looking for is not listed, try using a different search term. (The search tool will not search by Program Type).

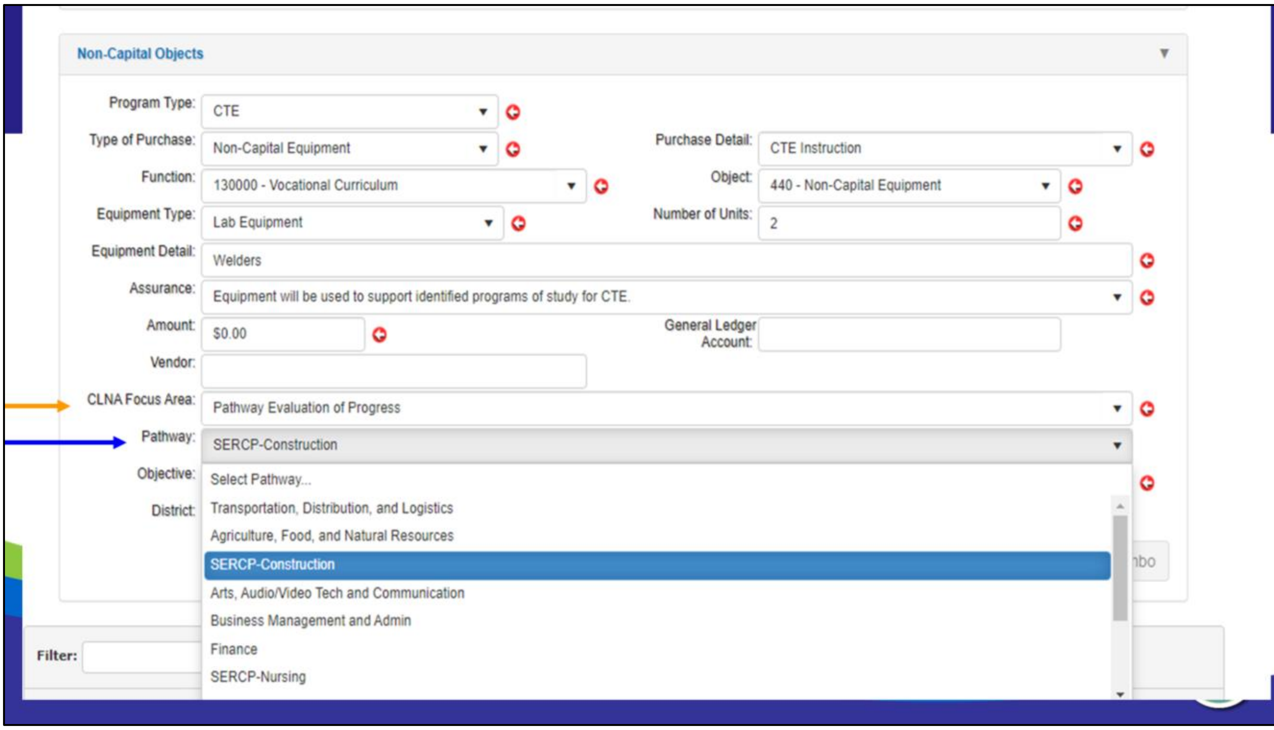
Search for Budget Combinations

Program Type	Position Label	Area Label	Position Activity	Function	Object
Administration	Career and Technical Educati...	No Description Beyond Position	Extended Contract	223700 - Vocational Educatio...	200 - Employee Benefits
Administration	Career and Technical Educati...	No Description Beyond Position	Standard (Default)	223700 - Vocational Educatio...	200 - Employee Benefits
Administration	Other Support Staff	Clerical/Support Staff	CTE Coordination	223700 - Vocational Educatio...	200 - Employee Benefits
Administration	Other Professional Staff in a N...	Other Duties	Project Coordinator	223700 - Vocational Educatio...	200 - Employee Benefits
CTE	Short Term Substitute Teacher	No Description Beyond Position	Curriculum Development	221200 - Curriculum Develop...	200 - Employee Benefits
CTE	Short Term Substitute Teacher	No Description Beyond Position	Professional Development	221300 - Instructional Staff Tr...	200 - Employee Benefits
CTE	Short Term Substitute Teacher	No Description Beyond Position	Standard (Default)	130000 - Vocational Curriculum	200 - Employee Benefits
CTE	Career and Technical Educati...	No Description Beyond Position	Extended Contract	223700 - Vocational Educatio...	200 - Employee Benefits
CTE	Career and Technical Educati...	No Description Beyond Position	Standard (Default)	223700 - Vocational Educatio...	200 - Employee Benefits
CTE	Other Support Staff	Clerical/Support Staff	CTE Coordination	223700 - Vocational Educatio...	200 - Employee Benefits
CTE	Program Aide	Teacher's Aide	CTE Classroom Support	130000 - Vocational Curriculum	200 - Employee Benefits
CTE	Teacher	Agriculture	Extended Contract-Curriculum...	221200 - Curriculum Develop...	200 - Employee Benefits

This is another way to see the WUFAR codes for a particular spending category, which is probably the most helpful.

Here, I clicked on personnel - and did a **search for budget combinations**. All the appropriate personnel budget coding combinations display for you.

You can see in the left column, it shows which positions are associated to admin and CTE program types.
Using this can help you identify what you want to select from the drop-downs before you start entering your information.



Here is an example of how the codes are entered into the system.

So let's say we're entering non-capital objects. Once you select non-cap from the top menu, this screen will pop up and is where you'll enter information about the purchase. (See upper left. It says, Non-capital Objects in blue, indicating that is what's been selected.)

The first thing you'll do is select the "type" of purchase, <see the first line on the left side>. In this example, CTE was selected rather than admin.

Most of the fields provide drop-down options, where you'll select the most appropriate response. Any field with a red arrow is required. For example, the amount of the purchase has a red arrow, but the General Ledger Account does not. You may use that field for your own record keeping purposes.

You can see that the CLNA focus area selected is the **Pathway evaluation of progress** and the **pathway being budgeted for is construction**.

All budgeted items must include a **clear description** of the item (That field is hidden in the screen shot), and it must align or be appropriate for the focus area and objective.

The objective field, kind of hidden, will pre-fill from the CLNA section where you indicated your objectives.

The school district is required for certain expenses for consortia only.

Any questions about what we’ve covered so far?

Budget

Purchase Item	Purchase Item Detail	Object Number	Object Label	Function Number	Function Label	Amount	Description	Vendor	CLNA Focus Area	Pathway	Objective
Private Vendor Contract	Professional Development	310	Personal Services	221300	Instructional Staff Training	$896.42	Registrations to attend professional development conferences and workshops (WMEA, WTEA, WAAE SkillsUSA, etc...)		Pathway Evaluation of Progress	Marketing	Implement new ideas and revise learning targets to align with industry standards and engage with all students
Private Vendor Contract	Professional Development	310	Personal Services	221300	Instructional Staff Training	$808.00	Travel costs to attend professional development conferences and workshops (WTEA, WMEA, SkillsUSA, etc...)		Pathway Evaluation of Progress	Science, Tech, Engineering, and Math	Attend professional development to increase the capacity of CTE staff to implement IRCs

This is an example of what the line item looks like once entered. There are two line items that I've pulled to review from purchase services.

The purchase item detail (pulled from drop-down options) is professional development.

The top one is a private vendor contract for registration costs, indicating the name of the conferences and the pathway instructors who are attending.

The second line item is for travel costs. These items are purchased to meet the needs in the CLNA focus area of the pathway evaluation.

What's odd is that two different pathways are indicated for what looks to be the same conferences. I think I know why this was done, but it would have been better to break out the training for marketing and the training for STEM separately. Meaning the marketing-related PD in one line and the STEM training in a second. The objective is also different (the last column), which doesn't make sense.

Budget

Capital Equipment	CTE Instruction	Lab Equipment	1	Vocational Curriculum	Haas Wireless Intuitive Probing System for Haas CNC Mini Mill to upgrade equipment to industry and dual credit standards.	Pathway Evaluation of Progress	Manufacturing	Update outdated equipment to match Industry & dual credit standards.	$5,001
Non-Capital Equipment	CTE Instruction	Simulators	2	Vocational Curriculum	Big Red Adult CPR Manikin	Equity and Access	Health Science		$3,800.00
Non-Capital Equipment	CTE Instruction	Large Appliances	1	Vocational Curriculum	Six burner stove for Culinary Hospitality lab	Equity and Access	Hospitality and Tourism		$3,393.00

We have three line items here. Let's look at the top one and read it from left to right.

We see that a capital equipment purchase has been entered. It is for instruction. It's for vocational lab equipment, and they are purchasing ONE piece of equipment. (These are all provided to you to select from via drop-down menus.) When we get to the description, which is keyed in, this example has more information than is needed for the description. This district included the reason for the purchase, which is most often not necessary. To make it easy on you and on your reviewer, just describe the item being purchased, such as the name of the item. The reason for the purchase should be clear in your objective (highlighted in green). If it's not, you can put minimal clarifying information in the description, but in this case, the objective is quite sufficient as to the reason for the purchase.

For the other two line items, everything is real clear. We see they are purchasing two simulators and one large appliance.

The problem here is that these items were budgeted for the Equity and Access focus area, which is not an appropriate focus area for purchasing equipment. These are pathway-related purchases, or in other words, purchases for instruction in the pathway, and not specific to reducing barriers to access the program.

Budget

Capital Obj

Capital Equipment	CTE Instruction	Lab Equipment	**1**	Vocational Curriculum	Haas Wireless Intuitive Probing System for Haas CNC Mini Mill	Pathway Evaluation of Progress	Manufacturing	Update outdated equipment to match Industry & dual credit standards.	$5,000.00

Purchase Service

Pupil Transportation	Instructional Field Trip	Pupil Transportation	Field Trips - Contracted	Visit to clinic and to FVTC to observe industry settings and postsecondary learning.	Pathway Evaluation of Progress	SERCP - Nursing	Ensure hands on pathway exploration.	$300.00

Here is another one.

The line item is a capital object. It's equipment. It's for instruction. **One item is being purchased**. It's for vocational education. The description of the item being purchased is **a Haas Wireless Probing System**. It is for the manufacturing career pathway. The objective is to purchase equipment that matches industry and dual-credit standards and will cost $5,000. (Wonderful.)

In the second example, you see the purchase of transportation for a field trip. It's contracted (likely a bus service). The description includes what the transportation is for (visits to clinics and Fox Valley Tech) to explore the career pathway of nursing. It will cost a total of $300. The type of transportation being contracted for, such as bus, is not as important as where the students are going. This is how we determine if there is proper alignment.

We'll stop here for questions.

Timeline

Activity	Dates
CPA application available in WISEgrants	March 2
Fund management selection and assurances	March 2 - March 30
Application submission deadline	April 30
Application review by DPI	April 1 – May 31
Application corrections and DPI review	May - June
Grant year begins	July 1

Again, here is the timeline for this year's application. It looks like we may be a little later making it available to you due to an unforeseen circumstance. We want your allocations to be accurate, and right now there are some questions related to census data due to COVID that we are waiting for confirmation on. So hold tight. There is plenty here to get you started, you have the instructions so you can draft out your application responses to input into the system later.

The next webcast will be a walk-through of the WISEgrants functionality and any new tips and tricks for using the system. We are shooting for the week of March 8th for that webcast.

Any remaining questions?